TAPER

TWICE-ANNUAL PRACTICE ENHANCEMENT RETREAT

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PHOENIX 2023

OCTOBER 18-20

LAWYERS WITH PURPOSE®

LawyersWithPurpose.com/TAPER

PHOENIX AGENDA OCTOBER 2023

	Wednesday, October 18	Thursday, October 19	Friday, October 20
8:00 AM - 8:50 AM	WELCOME/INTRODUCTIONS	CYBER SECURITY - ARE YOU PROTECTED?	8:00AM-10:15AM WHY DAY
8:50 AM - 9:00 AM | BREAK			
9:00 AM - 10:15 AM	KEYNOTE SPEAKER: DR. TRACEY WILEN	HOW ARE YOU SHOWING UP?	
9:00 AM - 10:15 AM		AI FROM A MARKETING AND LEGAL PERSPECTIVE	
10:15 AM - 10:30 AM | BREAK			
10:30 AM - 11:30 AM	GENERATING DOC TEMPLATES AND SENDING VIA ACTIONSTEP	STRATEGIES AND BEST PRACTICES FOR USING ANNUITIES IN CRISIS MEDICAID PLANNING	
10:30AM - 11:30 AM	GREAT FIRST DATE, NOW WHAT? BUILDING A STRATEGY WITH RMS PARTNER	PROJECT MANAGEMENT	
	11:30 AM - 1:00 PM | LUNCH SPONSOR	11:30 AM - 1:00 PM LUNCH & LEARN: ACTIONSTEP: ANNUAL REPORT	
1:00 PM - 2:15 PM	"DIFFICULT CLIENTS" & WHY THEY DON'T EXIST: A LESSON IN COMMUNICATION & EXPECTATION SETTING	1:00PM-5:15PM FIRM RETREATS	
1:00 PM - 2:15 PM	ELIMINATE THE OVERWHELM: HOW TO COMPLETE A MEDICAID APPLICATION		
2:15 PM - 2:30 PM | BREAK			
2:30 PM - 3:45 PM	SOCIAL STYLES		
2:30 PM - 3:45 PM	NURSING HOME MARKETING		
3:45 PM - 4:00 PM | BREAK			
4:00 PM - 5:15 PM	TEAM MEMBER ROUNDTABLE		
4:00 PM - 5:15 PM	ATTORNEY ROUNDTABLE		
5:15 PM - 6:30 PM	COCKTAIL HOUR		

WEDNESDAY, OCTOBER 18, 2023

Welcome/Introductions

October 18 | 8:00 am-8:50 am

Keynote Speaker

Dr. Tracy Wilen

October 18 | 9:00 am-10:15 am

The world is in disruption! Companies are at the forefront of rapid and unpredictable change. The continued accelerated pace of technology, and competitive forces is causing workplace environments to become more volatile and in need of disruptive leaders, employees to challenge the status quo.

Dr. Tracey Wilen is a researcher, speaker, Author on the impact of technology on society, work, and careers. A former visiting scholar at Stanford University, she has held leadership positions at Apple, HP, Cisco Systems, and the Apollo Group. She has been an adjunct professor for California colleges teaching classes in business, technology, and women's workforce topics.

Dr. Wilen has authored or co-authored 13 books, and she has appeared on CNN, Fox, and CBS News, and in the Wall Street Journal and many others. She is a regular guest on radio and TV shows across the US as an expert contributor.

Generating Doc Templates and Sending via Actionstep

Presented by: Julie Salter, Client Services & Marketing Coordinator at Salter Law LLC

October 18 | 10:30 am – 11:30 am

Automation plays such a big part in today's world of process and workflows which is why being able to generate document templates into emails directly inside Actionstep is so important. This session focuses on just that: how to transfer the letter templates into emails that you can send directly through your Actionstep system! Participants will learn where in Actionstep to access the tools to send e-mails directly to clients as well as how to ensure certain fields merge to make emails more personal and link to their matters automatically. Participants will walk away with the understanding that they CAN use Actionstep for more than just tracking by updating the tasks to automate their process even more. This is one session you don't want to miss!

Great First Date, Now What? Building a Strategy with RMS Partner

Presented by Tim Crisafulli, ESQ & Leigh Baldwin, President of Leigh Baldwin and Co.

October 18 | 10:30 am – 11:30 am

Enhance your relationship management skills! Develop strategies to build relationships and institute collaborative processes that add value to the client experience. Participants will learn about a specific approach that will allow them to capitalize on a successful synergy meeting and thereby increase client referrals to both parties. This interactive session will include learning what is "good synergy" as well as how to integrate each professional's process to add value to the client.

"Difficult Clients" & Why They Don't Exist: A Lesson in Communication & Expectation Setting

Presented by Briana Moriarty, Head of Professional Services, Lawyers with Purpose

October 18 | 1:00 pm – 2:15 pm

In this vibrant session for both attorneys and team members, we will eliminate the term "difficult client" from your firm's dictionary. We will discover the concept that miscommunication leads to a whole boatload of issues with clients and team members. This interactive session will review the MIFY Skills and how well you're incorporating them into everyday interactions. A quick review of social styles and how you may communicate without using any words. We will visit the concept of "other people's eyeglasses" and how it plays into your client interactions. How to deal with pushbacks in a respectful way and how setting proper expectations are key in all client and team interactions. You will leave this session with a better understanding of how communication and expectation setting can create more successful interactions with your clients and team members.

Eliminate the Overwhelm: How to Complete a Medicaid Application

Presented by Katarina Lepinski, Certified Medicaid Planner ™ , Medicaid Coordinator & Implementation Manager, Hougum Law Firm, LLC

October 18 | 1:00 pm – 2:15 pm

Are you mystified by the Medicaid application process? Are you sick of the back-and-forth with clients and caseworkers? Do you even know what the application is really asking for? Katarina Lepinski, Medicaid Coordinator at Hougum Law Firm (Wisconsin), will share her tips and tricks for successfully completing a Medicaid application. She will focus on how to efficiently collect the required documents, and how to organize and track them through the process. You'll learn about resources available to you, and how to use them. Join us for this interactive session as Kat walks through the process of completing a sample Medicaid application. Remember, just because your clients are in crisis, doesn't mean your law firm has to be!

Social Styles

Presented by Jennah Gerhard, Law Firm Leader, Bellomo & Associates

October 18 | 2:30 pm -3:45 pm

Firms can experience dramatic, measurable improvements in performance when their people learn how to adapt to others' social styles. For most of us, interpersonal behaviors and preferences are habitual and largely out of awareness. Develop a recognition that people do have different styles and that each has unique strengths. Once attendees know their own style and understand style differences, they can learn how to modify behaviors to make it easier to exchange information and work together to make decisions in a way that is more effective for the whole team.

Nursing Home Marketing

Presented by Sandy Ard, Attorney & Owner, Ard Law Firm, LLC

October 18 | 2:30 pm – 3:45 pm

Are you looking for fresh and impactful ways to connect with your community? Maybe you've been considering strategically expanding your Medicaid enterprise and establishing genuine connections with neighboring nursing homes. It all starts with a simple conversation – and that's where we come in as your committed partners. We're here to help you kick off those crucial conversations and foster relationships that stand the test of time. Prepare to discover the art of building trust and ensuring top-notch care for your esteemed clients.

Team Member Roundtable

October 18 | 4:00 pm – 5:15 pm

You asked for the roundtables to make a comeback, and we listened! The Team Member Roundtable is an open format that gives you the ability to engage with fellow team members within our community. Our roundtables are designed to offer engaging conversations, feedback, and suggestions! By attending this session, you will not only learn from other firms, but you will also take away tips and techniques that can be implemented in the firm! You do not want to miss out on this session in Phoenix!
This session is for team members only!

Attorney Roundtable

October 18 | 4:00 pm – 5:15 pm

Attorneys – the Roundtable is back at TAPER! Our Attorney Roundtable is an open discussion that has been created to offer a wide range of relevant topics! It can be used to identify challenges and roadblocks, offer insight to solutions, and an overall benefit of collaboration with your fellow community members! Why not learn from your fellow colleagues? It's the best type of collaboration! You will have the ability to be a part of engaging conversations, insights into solutions to potential roadblocks and challenges you may face, as well as support from the community! You do not want to miss this session in Phoenix!
This session is for attorneys only!

THURSDAY, OCTOBER 19, 2023

Cyber Security – Are you Protected?

Presented by: Bruce Kelly, CEO of Vivitec

October 19 | 8:00 am – 8:50 am

In today's small to medium sized business market, there are several misconceptions about how safe you are from a cyber-attack. During this session, you'll gain a better understanding on how law firms can be prime targets for cyber criminals. You'll get a glimpse into real world examples of small business threats, what they look like, and how you can prevent them from happening!

How are you showing up?

Presented by A. Sipes, Attorney/Owner, Compass Estate Planning & Elder Law

October 19 | 9:00 am – 10:15 am

Join us for an engaging session focused on cultivating a culture of professionalism within the legal realm. Explore the fundamental principles of ethical conduct, client communication, and collaborative teamwork that define a successful and respected law office. Gain practical insights and strategies to enhance your professional image, build strong client relationships, and contribute to a harmonious and effective legal environment.

AI From a Marketing and Legal Perspective

Presented by: Lisa Burline-Roser, Director of Marketing, Lawyers with Purpose & Michael Menninger, Owner & Attorney, Houck Menninger Law, LLC

October 19 | 9:00 am – 10:15 am

Join us for an enlightening session that delves into the dynamic interplay between Artificial Intelligence (AI) and the realms of Marketing and Law. In this thought-provoking discussion, we'll explore how AI technologies transform marketing strategies and reshape legal landscapes. Driven by data-driven insights, AI is revolutionizing consumer engagement, personalized campaigns, and market analysis. Simultaneously, its rapid evolution raises pertinent legal considerations, from data privacy to intellectual property. This session will unravel the opportunities and challenges at the nexus of AI, Marketing, and Law, providing valuable insights for professionals seeking a comprehensive understanding of this evolving landscape.

Strategies and Best Practices for Using Annuities in Crisis Medicaid Planning

Presented by: Dale M. Krause, J.D., LLM, Owner of Krause Financial Services

October 19 | 10:30 am – 11:30 am

The Medicaid Compliant Annuity revolutionized the Estate Planning industry. Are you using them to your clients' full benefit? How should your strategy differ for single versus married clients? Come learn best practices for using the Medicaid Compliant Annuity from the creator, himself! Our strategic partner, Dale M. Krause, J.D., LLM, will review MCA requirements, and go beyond the basics to illustrate how to use annuities in crisis planning. Dale has over 30 years of experience in elder law, estate planning, and asset preservation solutions, and frequently educates and empowers other professionals in their long-term-care planning cases. Gain fresh insights from real-life examples and learn how to effectively qualify your clients using this spend-down technique.

Project Management

Presented by Bethany Mackey, COO, Lawyers with Purpose

October 19 | 10:30 am - 11:30 am

Have you ever struggled with completing a project? Have you ever felt stuck before the project even started? Worried about how long your project will take to finish? And what if things change? The good news is we will be walking through how to start a project when it feels too big, how to manage the time needed to get things done, and what happens when things change. That is right, things will change and your project can still be a success. Come join us as we walk through a project and send you home with new questions, and new ways to handle whatever comes at you.

Firm Retreats: Rising Above Challenges

Phil Miner, Subject Matter Expert, Lawyers with Purpose
Bryn Simpson, Head of Experience, Lawyers with Purpose
Bethany Mackey, COO, Lawyers with Purpose
Amanda Bossow, Head of Education, Lawyers with Purpose
Briana Moriarty, Head of Professional Services, Lawyers with Purpose

October 19 | 1:00 pm - 5:15 pm

Join forces as a team to strategize both your individual and professional goals. Learn to set measurable objectives utilizing Brainstorming Sprints, the Money Plan, the Four-Month Focuser, the Implementation Focuser, and the Project Focuser. Come with your ideas and an open mind. Equip your team with the tools to prepare for and conquer obstacles in the coming quarter!

FRIDAY, OCTOBER 20, 2023

Why Day

Presenter: Patrick Grady, Owner of Today & Tomorrow Enterprises, Inc.

October 20 | 8:00 am – 10:15 am

Patrick T. Grady has over two decades of experience as a speaker and trainer, his extraordinarily powerful presentations can help you navigate your way through the maze of challenges we face in our organizations, corporations, associations and educational environments.

Using a high energy approach with clean and appropriate humor, stories and analogies as the catalyst for his message, Patrick will help you to develop skills that will dramatically impact how you deal with and implement your responsibilities. Utilizing interactive activities and real world examples, your audience will more than simply listen . . . they'll learn to take action NOW and gain breakthrough skills for leaders at every level!

Through his humorous and interactive presentations, Patrick assists participants in identifying the positives associated with our careers, he teaches attendees how to get out of paradigms that hold back creative thinking and develop new patterns of thinking that support innovation and new ideas.