



2013 Practice Management Annual Juris Conference
 SEPTEMBER 16-17 | SAN ANTONIO

Monday, September 16, 2013

7:30 - 8:30 a.m.	Breakfast		
8:30 - 8:45	Welcome		
8:45 - 9:45	Keynote		
9:45 - 10:00	Break		
	Fundamentals Track	Advanced Track	Learning Labs
10:00 - 11:00	Fundamentals of Juris Suite Reporting <i>Kelly McNamee</i>	Accounting and Budgeting Considerations <i>Tyler Chapman and Joel Eaton</i>	
11:10 - 12:10 p.m.	Taking the Hassle out of Expense Schedules <i>Celeste Bradford</i>	Legal Billing Trends <i>Tyler Chapman</i>	Juris Suite Reporting Learning Lab <i>Kelly McNamee</i>
12:10 - 1:30	Lunch		
1:30 - 2:30	Product Update		
2:30 - 2:40	Break		
2:40 - 3:40	Customizing Your Bill Designs <i>Celeste Bradford</i>	Profitability Basics in Juris <i>Tyler Chapman and Joel Eaton</i>	Juris Suite Reporting Learning Lab <i>Kelly McNamee</i>
3:40 - 4:00	Break		
4:00 - 5:00	Best Practices in Billing, AR and AP <i>Kelly McNamee</i>	Key Performance Indicators <i>Tyler Chapman and Joel Eaton</i>	Bill Designs Learning Lab <i>Duane Cary</i>
6:30 - 10:00	Customer Appreciation Dinner		

Agenda subject to change.

- [View Fundamentals Track descriptions](#)
- [View Advanced Track descriptions](#)
- [View Learning Labs descriptions](#)



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Tuesday, September 17, 2013

	Fundamentals Track	Advanced Track	Learning Labs
7:15 - 8:30 a.m.	Breakfast		
8:30 - 9:30	A Look Ahead - Technology Tools to Drive Profitability <i>Steve Fetters and Mike Wasco</i>	The Power of BI and Juris Reporting <i>Joel Eaton</i>	
9:40 - 10:40	Creating Juris Suite Compliance Rules <i>Celeste Bradford</i>	Manage Your Firm Like a Business <i>Tyler Chapman and David Caiati</i>	Bill Designs Learning Lab <i>Duane Cary</i>
10:40 - 11:00	Break		
11:00 - 12:00 p.m.	Troubleshooting Tips <i>Kelly McNamee and Kim Herrick</i>	Supporting Alternative Billing Arrangements <i>Joel Eaton</i>	Creating Juris Suite Compliance Rules <i>Celeste Bradford</i>
12:00 - 1:00	Lunch		
1:00 - 2:00 p.m.	What's New in Juris Client Intake <i>David Caiati</i>	Practice Area Innovation <i>Tyler Chapman and Niki Lanter</i>	Creating Juris Suite Compliance Rules <i>Celeste Bradford</i>
2:00 - 2:10	Break		
2:10 - 3:10	Juris Topic Café		
3:10 - 3:30	General Closing and Prize Drawing		

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[View Fundamentals Track descriptions](#)

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Fundamentals Track Descriptions

Session	Description
Sept. 16 10:00-11:00 AM Fundamentals of Juris Suite Reporting <i>Kelly McNamee</i>	Get the most out of reporting by learning the unique features found in the Juris Suite Reporting module including Report Distributions, Data/Analysis Tabs, Additional Parameters and an Introduction to Report Editing.
Sept. 16 11:10-12:10 PM Taking the Hassle out of Expense Schedules <i>Celeste Bradford</i>	Practical solutions for taking the complications out of expense schedules. Learn how to more easily manage customs rates, expenses and complex client requirements.
Sept. 16 2:40-3:40 PM Customizing Your Bill Designs <i>Celeste Bradford</i>	Learn how to produce professional, tailored bills that meet your clients' unique needs while reducing errors, adjustments, write-offs and bad debt.
Sept. 16 4:00-5:00 AM Best Practices in Billing, AR and AP <i>Kelly McNamee</i>	Increase your Juris Core A/P, A/R and Billing process efficiency by using shortcut keys, text codes, notecards, updating standard rates, bill design options, and other quick tips gathered by Support, Training and long-time Juris users.
Sept. 17 8:30-9:30 AM A Look Ahead - Technology Tools to Drive Profitability <i>Steve Fetters and Mike Wasco</i>	Learn about new technologies that can change the way you conduct day-to-day business and help your firm achieve maximum efficiency.
Sept. 17 9:40-10:40 AM Creating Juris Suite Compliance Rules <i>Celeste Bradford</i>	Commonly used compliance rules: Why to use them, how to create them, and how they can help speed up your billing process.
Sept. 17 11:00-12:00 PM Troubleshooting Tips <i>Kelly McNamee and Kim Herrick</i>	We've gathered the top FAQs from Support including questions how to manage your Juris Core Bank Reconciliations, Cash Receipts and Payment Vouchers including Trust Transactions, and we can't wait to share the answers with you!
Sept. 17 10:00-11:30 AM What's New in Juris Client Intake <i>David Caiati</i>	A well-defined client intake process can help your firm reduce the risk of missing critical client data and avoid conflicts of interest. You'll learn more about client intake best practices and enhancements in Juris that can help automate and streamline your firm's client intake process.

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Advanced Track Descriptions

Session	Description
Sept. 16 10:00-11:00 AM Accounting and Budgeting Considerations <i>Tyler Chapman and Joel Eaton</i>	The right budgeting and accounting models can take almost any firm to a new level of profitability, yet most firms barely scrape the surface of possibilities available in Juris. This class will help you understand more about the advanced budgeting and accounting capabilities of Juris and how to use those capabilities to increase your own firm's profitability.
Sept. 16 11:10-12:10 PM Legal Billing Trends <i>Tyler Chapman</i>	Ease pressures on the back office by learning more about the latest trends and industry requirements around electronic billing, insurance defense, and other trending topics in legal billing. Led by experts in Juris and the legal industry, this class will help you get on top of industry trends and learn how to incorporate new and innovative solutions to help answer those trends and increase firm profitability.
Sept. 16 2:40-3:40 PM Profitability Basics in Juris <i>Tyler Chapman and Joel Eaton</i>	Learn more about the foundational practices in Juris that can help your firm achieve maximum profitability. This class will cover reports and data elements; how you can help your firm by becoming the profit police; how you can help uncover the most profitable clients, offices, timekeepers and practice classes using Juris best practices; and more.
Sept. 16 4:00-5:00 PM Key Performance Indicators <i>Tyler Chapman and Joel Eaton</i>	This class will help you lock in on the key performance indicators for your firm and how you can use Juris to present financial data to the right people in your firm in the right way to help increase profitability.
Sept. 17 8:30-9:30 AM The Power of BI and Juris Reporting <i>Joel Eaton</i>	Learn how to use the full power of Juris Core Reporting and Business Intelligence modules to explore every aspect of your firm's profitability drivers, and ultimately, help improve its financial picture.
Sept. 17 9:40-10:40 AM Manage Your Firm Like a Business <i>Tyler Chapman and David Caiati</i>	This class will help back office personnel understand more about the vital role they can play in law firm profitability, and how working with Juris and the right people can give you the power to improve your firm's financial picture.
Sept. 17 11:00-12:00 PM Supporting Alternative Billing Arrangements <i>Joel Eaton</i>	AFAs are fast becoming the predominate way of charging for legal services. It's time to help your firm achieve maximum profitability by learning more about best practices for dealing with flat fees, retainers, phase billing, and back-office cycles.
Sept. 17 1:00-2:00 PM Practice Area Innovation <i>Tyler Chapman and Niki Lanter</i>	While the increasing prominence of intellectual property, energy, and corporate law present new opportunities for law firms, they also put new demands on back office workflows and billing needs. Learn how Juris can help you develop new processes and reporting methods that can not only ease back-office workload, but also help improve firm profitability.

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Learning Labs Descriptions

Session	Description
Sept. 16 11:10-12:10 PM Juris Suite Reporting Learning Lab <i>Kelly McNamee</i>	Learn to make cosmetic changes to your standard Juris Suite reports to meet your firm’s needs including adding and deleting data fields, logos and labels as well as sorting and grouping the report. This session is limited to 20 participants.
Sept. 16 2:40-3:40 PM Juris Suite Reporting Learning Lab <i>Kelly McNamee</i>	Learn to make cosmetic changes to your standard Juris Suite reports to meet your firm’s needs including adding and deleting data fields, logos and labels as well as sorting and grouping the report. This session is limited to 20 participants.
Sept. 16 4:00-5:00 PM Bill Designs Learning Lab <i>Duane Cary</i>	Bring your Bill Designs on a flash drive or edit ours and take them home to start using immediately! For example, decide which sections to show on the prebill or final bill, suppress items when there’s no data, determine tab order, add and arrange fields and sections and apply styles. This session is limited to 20 participants.
Sept. 17 9:40-10:40 AM Bill Designs Learning Lab <i>Duane Cary</i>	Bring your Bill Designs on a flash drive or edit ours and take them home to start using immediately! For example, decide which sections to show on the prebill or final bill, suppress items when there’s no data, determine tab order, add and arrange fields and sections and apply styles. This session is limited to 20 participants.
Sept. 17 11:00-12:00 PM Create Juris Suite Compliance Rules <i>Celeste Bradford</i>	Use step by step instructions to create Juris Suite Compliance Rules and take them home to implement at your firm!
Sept. 17 1:00-2:00 PM Create Juris Suite Compliance Rules <i>Celeste Bradford</i>	Use step by step instructions to create Juris Suite Compliance Rules and take them home to implement at your firm!

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