Worldwide Conference Schedule
Curriculum

The following is the most current VANTAGE 2017 Worldwide Conference curriculum (updated on May 17, 2017). New sessions will be added over the next few weeks. Be sure to bookmark this web page and revisit for the most current schedule.

For our ProLaw and Legal Tracker clients, we have designed two two-day conferences, ProLaw Summit at VANTAGE and Tracker Summit at VANTAGE, that include all ProLaw and Legal Tracker sessions. Please visit ProLaw Summit schedule or Tracker Summit schedule for details.

All VANTAGE Worldwide sessions and tutorials qualify for CPE credit.

Sessions are listed as follows:
- Insights & Outlooks
- Business Development
- Enterprise
- Enterprise to 3E
- 3E

Focus areas:
Each icon represents a specific focus area within the firm, for example, Finance. The sessions and tutorials at VANTAGE have been designed for these focus areas.
- Business Development
- Finance
- IT/Technology
- Management
- Risk and Compliance
- Transactional/ Litigation

Schedule grid:
A quick reference schedule grid is located after the sessions list. Jump to the schedule grid »
MONDAY, JUNE 5, 2017

1:00 pm – 3:00 pm
Common E-Billing Mistakes Managers Should Know About and How to Assist in Correcting Them
Presented by Christine Smith and Kasey Kellum
During this tutorial our experts will show you common mistakes e-billers make, causing delays in e-billing as well as rejections. We will also help you find simple solutions to assist your e-billers to eliminate those mistakes.

TUTORIAL
FLORIDIAN SALON F

3:15 pm – 5:15 pm
E-Billing Best Practices for E-Billers and Managers
Presented by Christine Smith and Kasey Kellum
During this tutorial our experts will show you best practice reports and best practice e-billing processes to ensure your e-billing team is e-billing efficiently.

TUTORIAL
FLORIDIAN SALON F

TUESDAY, JUNE 6, 2017

11:45 am – 12:45 pm
Design Gallery Roadmap
Presented by Jason Taylor
Many exciting things are happening with Design Gallery. Come see where the product is going by getting a glimpse at our roadmap of new functionality planned for future releases.

FLORIDIAN SALON A

1:45 pm – 2:45 pm
The Lawyer Experience: Workspace and Elite Mobile Demonstration and Overview
Presented by Priya Ramaswamy and Paul Odette
View a live demonstration of how lawyers can get their job done using an intuitive user interface that seamlessly brings together 3E, MatterSphere, Elite Data Insights, and Business Development Premier data. You'll learn how you can empower your lawyers with automated client insight, let them access documents and enter time on the go, view dashboards and client and matter reports, interact with 3E processes, and more.

FLORIDIAN SALON F

Evaluate - Matter Pricing and Budgeting
Presented by Rob Stote and Dan Wales, both of DW Reporting
Increasing client, regulatory, revenue and cost pressures mean that matter pricing and budgeting has quickly become one of the leading trends in the legal industry. To help you create and manage matter plans, and monitor the engagement in real time, DW Reporting are delighted to present Evaluate, a data-driven market leading solution available for both Enterprise and Elite 3E platforms. Using this tool, and aided by historical data, and user inputs - users can price, plan and manage complex matters seamlessly, yet intuitively, to maintain both client expectations and profitability.

FLORIDIAN SALON K

3:00 pm – 4:00 pm
Securing the Legal Cloud
Presented by Anne Marie-Scollay and Rick Weyenberg, Azure Cloud Solutions Architect, Microsoft
More law firms than ever are looking at moving to the cloud, and careful security planning is vital to a successful cloud strategy. The good news? The legal industry can learn from the many other industries who have gone to the cloud already. Join experts from Microsoft and Thomson Reuters for an overview of what law firms should learn about cloud security best practices proven by years of experience in other sectors. And, since law firms face unique challenges and opportunities, discover a few cloud security tips for success specific to the legal industry as well.

FLORIDIAN SALON A

Design Gallery v3 in Action
Presented by Jason Taylor and Dave McKay
Design Gallery version 3 is a major release which includes fundamental changes to how documents are created and distributed. Join us for a detailed demo that will guide you through the new v3 experience. You will see how you can take control of your entire document automation processes and do things not possible with v2.

BONNET CREEK SALON X
4:30 pm – 5:30 pm

**Workspace and Mobile: What’s New and Product Roadmap**
Presented by Priya Ramaswamy and Paul Odette
Come find out where Elite is and where it’s going with Workspace and Mobile – the lawyer user experience that brings together 3E, MatterSphere, Elite Data Insights, Business Development Premier, and other applications within your firm.

**Conversion and Migration Bootcamp: Practical Tips to Help You Prepare for New Practice Management Software**
Presented by Shishir Shetty, Rob Beisswenger and Russ Haskin, all of Wilson Legal Solutions
It only makes natural sense that when a firm goes through a practice management conversion or migration their first goal is to make sure they can produce the same results that they had with previous versions. However, many clients realize after the fact that there were inherent opportunities to improve and align processes, advance deliverables, and strategically use the conversion as way of betterment for the firm. Wilson Legal Solutions and it’s team is well versed in working with firms to identify opportunities for improvement while establishing a solid plan to bring the firm through a conversion or migration with as much benefit as possible. This informative session will feature experts at Wilson Legal as they lead an interactive discussion on how best to position your firm when taking on these engagements. Discover practical tips on how to avoid the pitfalls that can lengthen many of these engagements while discovering the additional benefits. Join in a real world case study illustrating the need for proactive planning well before an engagement starts.

**Elite Integration Framework Data Sync: How to Implement Bi-directional Syncs with Elite and Third-Party Applications**
Presented by Brad Reaves and Darren Baldwin
This is an in depth technical overview explaining how to implement bi-directional data integrations between Elite products such as 3E and MatterSphere, and also 3rd party applications.

**Law Firm Profitability: Trends and Dynamics from a Global Market Perspective**
Presented by Tom Jones, Founder and President, Iridium Technology
This session will provide an executive overview of the latest insights and business drivers in law firm profitability analysis and reporting with the global legal market. The briefing will be led by Tom Jones, President of Iridium Technology. Iridium provides business intelligence and profitability solutions for law firms in the US, APAC, and UK/EMEA. The firms cover all sizes, from single-office to multi-national. This session will highlight the current trends and upcoming developments for profitability analysis and reporting by firms in the US and other regions. The session will include numerous "mini case studies" to show how the trends are being applied by firms.

**Jump Starting Your Project (3E or Enterprise) – Key Points to Consider Before Your Project Starts**
Presented by Deb West and Terry Hornung, both of Source Consulting Group, LLC
Are you ready to take the leap? Whether that leap is to implement 3E or upgrade your current environment, (3E or Enterprise), there are discussions that can be had and tasks that can be completed, prior to your project kick-off, that will jump start your project and give you the key factors you need in gauging the success of your project. Source Consulting Group has assisted many clients with their 3E implementations as well as with upgrades to both 3E and Enterprise. Join us as we share some of our suggestions on how to get your project started on the right track and completed successfully.
Wednesday, June 7, 2017

9:00 am – 10:30 am

Is the Cloud More Secure Than You Think?
Presented by Ruby Lee, Mark Gendein, and Rick Weyenberg, Microsoft
During this session, we will tackle some of the top security questions when evaluating Cloud-based solutions. Additionally, we'll share with you the steps Elite is taking to ensure we are providing products of value while also protecting your data.

Improve Your Bottom Line with Matter Management
Presented by Jerry Young and Rich Rifkin
Today's law firms serve increasingly sophisticated clients who expect alternative fee arrangements rather than traditional pricing. Additionally, law firm leaders - eager to protect profits and reduce legal and business risk - now prioritize process improvement and matter management solutions to improve legal work product delivery. In this new normal, MatterSphere has become an invaluable tool as law firms. Get a taste of this powerful and far-reaching product in this session. Learn about MatterSphere as a front office tool, a case management system, a document management repository – and a whole lot more.

Moving from Document Studio to Design Gallery
Presented by Matt Klem and Randy Roy
Thinking about moving to Design Gallery? In this session, we will discuss all of the key items you need to know about moving to Design Gallery v3 from Document Studio. We'll cover everything about the upgrade path, from solution development, to server set up and configuration.

Legal Cloud Crash Course
Presented by Rick Weyenberg, Azure Cloud Solutions Architect, Microsoft
Think moving your law firm to the cloud is complicated? It doesn't have to be. Join us for an overview of a few fundamental cloud concepts that will help you begin planning the right path for your firm. What are the advantages of public vs. private cloud? What are the trade-offs firms should evaluate between SaaS, PaaS, and IaaS? What other key costs and benefits are important to consider upfront? Learn top insights from a Microsoft cloud expert.

3E and MatterSphere: Enhance Your New Business Request Process – and Manage More than Just Conflicts!
Presented by Paul Odette and Brad Reaves
Come see how MatterSphere, paired with 3E, provides the smooth and efficient business request process your lawyers and secretaries demand. You'll also learn about additional key integration points between 3E and MatterSphere and how they can work together to make your practice run more smoothly.

xcelerate Budgeting and Forecasting and NEW Cost to Serve Module
Presented by Jag Dhariwal, Vice President of Global Sales, OLAP Vision
The NEW xcelerate Cost to Serve module – extend your investments and learn how xcelerate helps your firm calculate profitability with flexibility and ease! Learn how xcelerate Budgeting and Forecasting, built for 3E and Enterprise customers, can help your firm protect profits with real-time budget insight and skyrocketing efficiency and accuracy. Come hear customer case studies and exciting new announcements.

11:00 am – 12:00 pm

xcelerate Budgeting and Forecasting and NEW Cost to Serve Module
Presented by Jag Dhariwal, Vice President of Global Sales, OLAP Vision
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FLORIDIAN SALON G

FLORIDIAN SALON F

TUTORIAL

FLORIDIAN SALON F

JACKSON

FLORIDIAN SALON K
1:45 pm – 2:45 pm

Troubleshooting a Design Gallery Environment
Presented by Matt Klem and Dave McKay

Why didn’t that invoice generate? Where’s my print job? These are common questions asked by Design Gallery users. In this session, we’ll discuss a range of concepts around how to best troubleshoot your Design Gallery environment.

FLORIDIAN SALON L

3:15 pm – 4:45 pm

Presented by Greg Nilsen

A look at the long-term roadmap plans for eBillingHub, including the next-gen version of the billing solution - Project Livewire.

TUTORIAL
FLORIDIAN SALON F

Introduction to Design Gallery Processes
Presented by Matt Klem and Jason Taylor

With Design Gallery v3 we introduced processes to provide flexible control over your document and distribution requirements. In this session we’ll cover how processes work, how to create them, and how to maximize their use.

TUTORIAL
FLORIDIAN SALON B

MatterSphere Developer Productivity and Customization Examples
Presented by Allan Wheatley

This session is for IT leaders looking to take their firm’s efficiency to the next level. The MatterSphere 7.2 release will be demonstrated, showcasing new features that significantly boost MatterSphere developer productivity.

TUTORIAL
FLORIDIAN SALON F

International Payments and Elite Integration – A Revolution of Process Improvement!
Presented by Anthony Loiacono, Co-Founder, Global Exchange

In today’s global economy, managing risk by protecting the firms’ international payment and cost recovery process is not only smart – it’s essential. This session focuses on the “Invoice » Billing » Payment” life cycle, including ONEStep invoice processing, data capture, exchange rate protection, EnhancedFX Elite integration, compliance protection, vendor remittance & global funds transfer. This addresses knowing what it has been billed in matter currency – without currency fluctuation risk when the payment is due. As a pioneer of direct invoice processing, Global Exchange transcends the existing law firm workflow into an improved process. This enables firms to maintain 100% control of the process with full integration into Elite. Discussion topics include: • Current issues facing cost recovery for international payments. • Elite integration without exchange rate, billing or accounting constraints. • Practical, effective strategies to implement an improved international payment environment. • How to implement a system to ensure the integrity of the firm is protected.

TUTORIAL
FLORIDIAN SALON B

THURSDAY, JUNE 8, 2017

8:45 am – 9:45 am

Getting the Most Value from Your Elite Partnership
Presented by Debbie Szumylo, Tracy O’Keefe, and Kevin Hathaway

In this session, we will explore the various resources that Elite offers you to make you successful, including:
• Support Team • Customer Experience Advocates • Secondment Program • Regional/Product User Groups • Elite Community • Knowledge Base • Customer Care Team • Billing Help Desk • Client Advisory Board During this session you will learn what each resource offers and how it can help you run your firm more efficiently.

FLORIDIAN SALON B

Working Together for a Better eBillingHub Ecosystem
Presented by Greg Brown and Greg Nilsen

Come learn about the steps that eBillingHub is taking to partner more closely with Time and Billing Systems, Corporate Client Vendors and other application providers to improve your overall e-billing experience.
Using Design Gallery’s Visual Designer
Presented by Matt Klem and Jason Taylor
In this session we will provide a general introduction on how to use Design Gallery's MS Word-like design tool, Visual Designer. In addition, if you have already legacy components in Design Gallery written in XSL code, this session will also look at taking these XSL components and migrating them into Visual Designer making them easier to modify in the future.

Our Journey with MatterSphere: A Firm’s Story
Presented by Alister Wyld and Ben Boyes, Turner Padget
Join a law firm for a discussion on what led them to select MatterSphere and how the system is now helping practices and lawyers at the firm work better.

Matter Planning and Pricing
Presented by Russ Holmes, Cosine
Built directly within the 3E Framework, Cosine’s Matter Planning and Pricing module has at its foundation all of 3E’s comprehensive client and matter management capabilities. The module delivers industry leading matter planning and pricing functionalities whilst accessing native rates, budgeting and other 3E features to deliver for the first time an elegant real time solution for 3E clients. See how it can help your firm deliver on time and on budget.

Matter Management: What’s New and Product Roadmap
Presented by Paul Odette
Join us for a year-in-review discussion covering matters or questions that have come up since the last user conference. We'll also highlight what's coming in the future MatterSphere roadmap.

ClientPay 2.0: Next Generation Payment Processing for Next Generation Law Firms
Presented by Ryan Beck, Vice President, and Vince Arnoldi, both of ClientPay
Today's top law firms are hungry for new technology advancements that will transform the way they do business. Join us to discover how our industry leading, next generation, credit card processing service makes invoicing and billing clients easy for you and easy for them. Hear how ClientPay’s newest platform, to be rolled out soon, will revolutionize recurring billing, enhance your client's payment experience, and provide firms the custom fields needed to successfully report on transactions. Did you know that ClientPay's Transaction Optimizer technology is helping Thomson Reuters's Elite firms save an average of 23% on their payment processing fees? Don't miss out on this next generation technology.

Data Visualization with Microsoft’s Power BI
Presented by Lisa Brown and Marc Solomon
Bring your data to life with Microsoft's Power BI Visualizations. With Power BI you can let your data tell a compelling story with rich data visualizations. See how easy it is to create new and modify existing visualizations and learn how Power BI fits inside the new Elite Data Insights solution.

ARCS3: Implementing & Managing Financial Strategies
Presented by Joe Zoghbi, MiniSoft, Inc.
How you can efficiently and effectively implement strategic account management solutions.

eBillingHub: Going Native in Microsoft Azure
Presented by Madhu Nair
Have a look at the Cloud technology underlying the future of eBillingHub, the new features it will enable, and how it will impact your law firm.

How to Extend Workspace and Mobile
Presented by Brad Reaves and Darren Baldwin
Learn how to go beyond out-of-the-box Workspace and Mobile options, and customize them to meet your firm’s unique requirements. This session provides a detailed demonstration of how to configure and customize the web and mobile user interfaces, and the Elite Integration Framework Data Sync.
The Myths & Realities of Time Entry: A Roundtable Discussion
Presented by Gabriela Isturiz, Co-Founder and President, and Matt Yezovich, Director of Sales, both of Bellefield Systems and Matt Yezovich, Director of Sales
Join Gabriela Isturiz, President of Bellefield Systems, and Matt Yezovich, Director of Sales, for a roundtable discussion on the challenges and solutions to timekeeping in the modern law firm. These industry-recognized thought leaders will touch on time entry as it relates to integration, firm adoption, revenue, and ROI including: how using time entry data has helped them make better decisions throughout the firm, how technology has helped them manage compliance with their time entry policy, and what's on the horizon for the most innovative firms.

3:00 pm – 4:00 pm
Workspace and Mobile: Deep Dive on Time Entry
Presented by Brad Reaves, Darren Baldwin, and Priya Ramaswamy
This session will provide a thorough demo of time entry capabilities and take you under the hood of how Workspace and Elite Mobile time entry integrates with the 3E database. You'll get an in-depth perspective of how the user interface interacts with 3E.

INSIGHTS & OUTLOOKS

TUESDAY, JUNE 6, 2017
4:30 pm – 5:30 pm
Peer Monitor Industry Trend Overview
Presented by Cory Branden
Learn about top trends emerging in the legal industry based on recent data from Peer Monitor.

WEDNESDAY, JUNE 7, 2017
9:00 am – 10:30 am
Next-Level Data for the GC and CFO
Presented by Greg Nilsen and Dan Bodnar
More e-billing and matter data are available than ever before for GCs, law firm CFOs, and their teams. How is the data boom helping or hindering your teams today, and what new opportunities or challenges do you expect in the future?

3:15 pm – 4:45 pm
Cloud on the Horizon
Presented by Ruby Lee
Over 40% of law firms expect that a quarter or more of their technology will be in the cloud in 1 - 3 years. Join this session to find out how the Cloud can fit into your firm's technology roadmap.
Lean Legal: Evolution or Revolution?
Presented by Priya Ramaswamy and Vinnie Scarinci
Find out how today's firms are streamlining processes and boosting revenue. This session covers how corporate legal departments and law firms are changing procedures and technology to cut costs and drive productivity, and see how fast this change is taking place.

The Intelligent Law Firm
Presented by Lisa Brown and Marc Solomon
What types of business intelligence do your lawyers and C-levels rely on most today? Come for a discussion on BI resources and the cost of missing timely and accurate data on your firm's decision making, and your revenue.

The Lawyer's Technology "Wish List"
Presented by Justin Farmer
What unmet technology needs will your lawyers face in 2017? What about in three years?

Cyber Security Arms Race
Presented by Anne-Marie Scollay
Preparing for major security risks – such as cyber terrorism, data privacy, and reputational impact – has never been more important. How ready is your firm? Come find out what it takes to overcome today's security risks.
## BUSINESS DEVELOPMENT

### WEDNESDAY, JUNE 7, 2017

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| 9:00 am – 10:30 am | Driving ROI and Lawyer Engagement in Business Development<br>
**Presented by Brad Messerich, Kyra Olson, and Priya Ramaswamy**<br><br>Plan, Engage, Convert, Measure, Communicate - Repeat. Join this exciting live demonstration of Business Development Premier to learn best practices for planning your BD campaigns, driving ROI, demonstrating success and empowering your lawyers to engage with minimal effort. | TUTORIAL           |                                                                                                                                            | MANATEE       |
| 11:00 am – 12:00 pm | 5 Key Technology Trends in Business Development<br>
**Presented by Madhu Nair and Ryan Schultz**<br><br>Exciting innovations are happening with Azure, Dynamics 365, Big Data, Social Integration, and Business Intelligence. Join this session to learn about the benefits of these technologies and how Business Development Premier plans to leverage them. | TUTORIAL           |                                                                                                                                            | MANATEE       |
| 1:45 pm – 2:45 pm | Managing Organizational Change to Maximize Business Development Success and Firm-wide Adoption<br>
**Presented by Rob Alston, Nick Strothman, Armstrong Teasdale, and Becky Martin, Brownstein Hyatt**<br><br>Having a successful CRM program is about much more than technology. Join us for a discussion on Organizational Change Management (OCM) best practices for successfully implementing Business Development Premier and boosting engagement within your firm. | TUTORIAL           |                                                                                                                                            | MANATEE       |
| 3:15 pm – 4:45 pm | 2017 Legal Marketing and Business Development Trends and Dynamics<br>
**Presented by Kyra Olson and Janet Bennett**<br><br>The importance of list management and email marketing is widely recognized in legal marketing. How are today's firms raising the bar to achieve even more? This session highlights the current legal marketing and business development trends. Live demonstrations illustrating how the trends can be applied in Business Development Premier will be given. | TUTORIAL           |                                                                                                                                            | MANATEE       |
| 4:45 pm – 5:30 pm | Emerging Law Firm Trends and How Your Attorneys Can Be Best Prepared for a New Business Development Opportunity<br>
**Presented by Rob Alston and Janet Bennett**<br><br>Come learn about emerging trends in law firm business development garnered from leading Thomson Reuters tools Peer Monitor and Monitor Suite. This session will discuss the legal market landscape, law firm profitability, growth industries and practices, along with best practices in using the tools and insights and to grow your practice. This discussion will allow you to hear how your peers are using legal analytics to strategically drive firm growth and better prepare attorneys to present themselves as a trusted advisor when meeting with in-house counsel. | TUTORIAL           |                                                                                                                                            | MANATEE       |
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| 8:45 am – 9:45 am | Business Development Premier: What’s New and Product Roadmap  
**Presented by Kyra Olson and Madhu Nair**  
What’s new with Business Development Premier and where is it headed? The Product Management team will highlight the most exciting features released over the past year and provide insights into the future roadmap direction, including the new Business Development Premier Cloud release. |
| 10:15 am – 11:15 am | Business Development Premier: Why Cloud?  
**Presented by Madhu Nair**  
Cloud is one of the hottest trends in legal IT, and Business Development Premier is evolving to stay on the cutting edge. Join this session to learn how Business Development Premier is leveraging Cloud technology. We’ll also discuss the advantages this technology provides for Cloud customers. |
| 11:30 am – 12:30 pm | How to Make Your Lawyers Love You  
**Presented by Kyra Olson**  
Business development success is largely dependent upon lawyer relationships, but lawyer engagement can be a challenge. Thomson Reuters Business Development technologies allow you to leverage automated intelligence from your lawyers’ daily activities so that you can empower them with comprehensive prospect and client information without asking them to lift a finger. |
| 1:30 pm – 2:30 pm | Cross-selling in Practice: Relationships + Experience = Opportunity  
**Presented by Brad Messerich**  
Identifying opportunities for cross-selling can be a challenge, particularly for firms organized by practice groups. This session focuses on frequently encountered challenges and the strategies for overcoming them, both technically and organizationally. |
| 3:00 pm – 4:00 pm | Breaking Down the Data Silos: Why Time & Billing Data Is Important to Business Development  
**Presented by Ryan Schultz and Prashant Bhuptani**  
Business Development Premier allows you to leverage integrated financial data in your Business Development initiatives. What financial data should you integrate? How does this information power cross-selling opportunities, key client programs, pitch teams, and more? How does linking client data with BD data benefit your lawyers? |
| 4:15 pm – 5:15 pm | Managing Your CRM Universe to Maximize Relevance and Impact  
**Presented by Mike Rose and Jillion Weisberg**  
Accurate and complete contact data is imperative to the success of both internal firm adoption and external contact engagement. Join this session to learn best practices for using Administration features and segmentation strategies to manage the breadth, relevance and quality of your CRM data. |
ENTERPRISE

MONDAY, JUNE 5, 2017

1:00 pm – 3:00 pm
Enterprise Interim Billing Best Practices
Presented by Darryl Brown and Maggie Walker-O’Connor
Join us for an extensive look at the Enterprise Interim Billing feature (a.k.a., Fixed Fee or On Account Billing). Interim billing enables your firm to render invoices without relieving work-in-progress. As unallocated credits reduce accounts receivables, interim balances reduce unbilled time and costs. This tutorial will cover everything from setups, to transactions, to the impact on statistics and reporting. [TUTORIAL]

Document Studio Maintenance and Advanced Template Design
Presented by Matt Klem and Randy Roy
Most customers use the basic features of Document Studio, but few use it to its full potential. In this session, we’ll walk through several advanced concepts in Document Studio, including dynamic subdoc references, macro execution, IFT repeatability and many other topics. [TUTORIAL]

3:15 pm – 5:15 pm
Enterprise Flat Fee Billing Best Practices
Presented by Maggie Walker-O’Connor and Darryl Brown
This tutorial provides an in-depth review of the setup, use, process flow, and reporting for implementing flat fee billing in Enterprise. [TUTORIAL]

Understanding Enterprise Framework Tools and Screen Customizations
Presented by Matt Jamma
Join us for an in-depth look at the Enterprise Tools menu functions and how they can be used to enhance and customize the Enterprise experience for your users. This tutorial will focus mainly on the functions that impact the user interface, including Data Dictionary Manager, Message Manager, Label Preferences, Query Builder, Multi Query Builder, and Tree View Editor. We also will explore the benefits of using Visual Basic for Applications (VBA) to extend the functionality of Enterprise applications by customizing screens to streamline processes as well as to secure data. You will learn how to move certain fields from one screen to another for the firm, group, or individual, and how to secure information by either disabling a field or even removing it. [TUTORIAL]

TUESDAY, JUNE 6, 2017

10:30 am – 11:30 am
Enterprise Multipayer Best Practices
Presented by Darryl Brown
What is multipayer billing? What is the the best way to use it? Join us for an exploration of how multipayer works, the benefits, and the impact on statistics and reporting.

Enterprise Write-ups and Write-downs Best Practices
Presented by Maggie Walker-O’Connor
Join us for an in-depth review of the various write-up and write-down options available in Enterprise. Discover how these transactions flow through the system in terms of realization and postings, and learn about their impact on statistics and reporting.
1:45 pm – 2:45 pm

**Evaluate - Matter Pricing and Budgeting**

Presented by Rob Stote and Dan Wales, both of DW Reporting

Increasing client, regulatory, revenue and cost pressures mean that matter pricing and budgeting has quickly become one of the leading trends in the legal industry. To help you create and manage matter plans, and monitor the engagement in real time, DW Reporting are delighted to present Evaluate, a data-driven market leading solution available for both Enterprise and Elite 3E platforms. Using this tool, and aided by historical data, and user inputs - users can price, plan and manage complex matters seamlessly, yet intuitively, to maintain both client expectations and profitability.

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3:00 pm – 4:00 pm

**Conversion and Migration Bootcamp: Practical Tips to Help You Prepare for New Practice Management Software**

Presented by Shishir Shetty, Rob Beisswenger and Russ Haskin, all of Wilson Legal Solutions

It only makes natural sense that when a firm goes through a practice management conversion or migration their first goal is to make sure they can produce the same results that they had with previous versions. However, many clients realize after the fact that there were inherent opportunities to improve and align processes, advance deliverables, and strategically use the conversion as way of betterment for the firm. Wilson Legal Solutions and it's team is well versed in working with firms to identify opportunities for improvement while establishing a solid plan to bring the firm through a conversion or migration with as much benefit as possible. This informative session will feature experts at Wilson Legal as they lead an interactive discussion on how best to position your firm when taking on these engagements. Discover practical tips on how to avoid the pitfalls that can lengthen many of these engagements while discovering the additional benefits. Join in a real world case study illustrating the need for proactive planning well before an engagement starts.

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**Paperless Proforma for Enterprise and 3E**

Presented by Karen Altnow

We will discuss making the transition from the Enterprise version to the 3E version of Paperless Proforma. Attendees will get a sneak peek at 3E Paperless Proforma and a roadmap tour into the future of Paperless Proforma.

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**Enterprise Conflicts Manager 3.10 and 3.11 Enhancements Review**

Presented by Janis Gaston

In this session, we will review the enhancements delivered in the Enterprise Conflicts Manager 3.10 and 3.11 releases. We will also provide an update on how the Enterprise 3.11 upgrades are progressing and where you can find more information on the Enterprise Progression.

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**Enterprise Favorite Features**

Presented by Jane Heino and Kevin Threlfall

Join Elite subject matter experts to hear about some of their favorite features. This is a perfect session to learn how to become more efficient with the system and business processes.
### Jump Starting Your Project (3E or Enterprise) – Key Points to Consider Before Your Project Starts
**Presented by Deb West and Terry Hornung, both of Source Consulting Group, LLC**

Are you ready to take the leap? Whether that leap is to implement 3E or upgrade your current environment, (3E or Enterprise), there are discussions that can be had and tasks that can be completed, prior to your project kick-off, that will jump start your project and give you the key factors you need in gauging the success of your project. Source Consulting Group has assisted many clients with their 3E implementations as well as with upgrades to both 3E and Enterprise. Join us as we share some of our suggestions on how to get your project started on the right track and completed successfully.

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### WebView 5.5 and 5.6 Enhancement Review
**Presented by Lynnette Gentry-Martinez**

In this session, we will review the enhancements delivered in the WebView 5.5 and 5.6 releases. We will also provide an update on how the Enterprise 3.11 upgrades are progressing and where you can find more information on the Enterprise Progression.

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### Enterprise Data Mining Tips and Tricks
**Presented by Matt Jamma**

Discover useful tips and tricks for mining data in Enterprise, including billing inquiry and standard reports by topic or need.

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### Enterprise AP/GL 3.10 and 3.11 Enhancement Review
**Presented by Ruben Linero**

In this session, we will review the enhancements delivered in the Enterprise Financial Manager (AP/GL) 3.10 and 3.11 releases. We will also provide an update on how the Enterprise 3.11 upgrades are progressing and where you can find more information on the Enterprise Progression.

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### xcelerate Budgeting and Forecasting and NEW Cost to Serve Module
**Presented by Jag Dhariwal, Vice President of Global Sales, OLAP Vision**

The NEW xcelerate Cost to Serve module – extend your investments and learn how xcelerate helps your firm calculate profitability with flexibility and ease! Learn how xcelerate Budgeting and Forecasting, built for 3E and Enterprise customers, can help your firm protect profits with real-time budget insight and skyrocketing efficiency and accuracy. Come hear customer case studies and exciting new announcements.

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### Paperless Proforma Customizations for Beginners
**Presented by Karen Altnow, Matt Klem, and Dave McKay**

Customizing Paperless Proforma can be a daunting task. Come learn about customizing Paperless yourself by modifying lists, details screen, user security, and much more.

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### Tips and Tricks in Enterprise Credits
**Presented by Darryl Brown**

In this session, we will share tips and tricks in Credits to help maximize your use of the application. Our focus will be on lesser-known options, so you'll be sure to learn something new!

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### Enterprise Billing Manager 3.10 and 3.11 Enhancement Review
**Presented by Maggie Walker-O’Connor and Darryl Brown**

In this session, we will review the enhancements delivered in the Enterprise Billing Manager 3.10 and 3.11 releases. We will also provide an update on how the Enterprise 3.11 upgrades are progressing and where you can find more information on the Enterprise Progression.
THURSDAY, JUNE 8, 2017

8:45 am – 9:45 am

Our Journey with MatterSphere: A Firm’s Story
Presented by Alister Wyld and Ben Boyes, Turner Padget
Join a law firm for a discussion on what led them to select MatterSphere and how the system is now helping practices and lawyers at the firm work better.

Volume Discounts and Alternative Fee Arrangements: How and When to Use Them
Presented by Rhonda Compher
Today’s clients are asking for new large volume discounts and alternative fee arrangements, in addition to all of the rate structures. Come find out how to use the 3E volume discounts and alternative fee arrangements and see how to make them work for you.

10:15 am – 11:15 am

Enterprise Records Manager 3.10 and 3.11 Enhancements Review
Presented by Janis Gaston
In this session, we will review the enhancements delivered in the Enterprise Records Manager 3.10 and 3.11 releases. We will also provide an update on how the Enterprise 3.11 upgrades are progressing and where you can find more information on the Enterprise Progression.

11:30 am – 12:30 pm

Enterprise Data Warehouse Reporting
Presented by Matt Jamma
Data Warehousing in Enterprise provides an easy method of combining data from across management reports into a single, easily modified, final report. By selecting the Data Warehousing option when generating a standard report in the Enterprise system, the report creates a table of data that is accessible through report writer applications. In this session, using standard Enterprise Data Warehouse reports, you will learn how to set up Excel to communicate with these Enterprise tables to retrieve information from them for reporting.

Paperless Proforma for 3E
Presented by Karen Altnow
Join Paperless Proforma Product Manager Karen Altnow as she shares a glimpse of Paperless Proforma for 3E and a roadmap tour into the future of Paperless Proforma.

1:30 pm – 2:30 pm

Enterprise Split Billing Best Practices
Presented by Maggie Walker-O’Connor
What is split billing? What is the the best way to use it? Join us for an exploration of how it works, the benefits, and the impact on statistics and reporting.

3:00 pm – 4:00 pm

Extend Best Practices and 3.11 Enhancements Review
Presented by Matt Jamma
Come and learn about the customization capabilities available with Enterprise Extend. Learn how to customize standard events to tailor them to your firm’s needs, and gain a better understanding of the enhancements included in the 3.11 release. Previous knowledge of Extend is strongly recommended. We will also provide an update on how the Enterprise 3.11 upgrades are progressing and where you can find more information on the Enterprise Progression.

Enterprise Billing Rates Best Practices
Presented by Darryl Brown
With complex rate demands and exceptions on the rise, this session will help you gain a better understanding of the hierarchy of standard and alternate billing rates and options.
MONDAY, JUNE 5, 2017

1:00 pm – 3:00 pm
Meeting Legal Business Requirements: Transitioning to 3E Rates
Presented by Rhonda Compher
Join us as we compare and contrast rate functionality between Elite Enterprise and 3E. We will examine timekeeper, cost, and exception rates. We'll also demonstrate a few rate scenarios.
TUTORIAL
FLORIDIAN SALONS D & E

3:15 pm – 5:15 pm
Transitioning to 3E: Advanced Multicurrency
Presented by Rhonda Compher and Ruben Linero
Explore the ease with which 3E handles multicurrency, from sub-ledgers to GL. This session will focus on the similarities and differences of the multicurrency framework, currencies conversion, and supportive reporting features in Enterprise and 3E. We will also walk through added feature sets like explicit currency, realized/unrealized FX, and the unlimited currency rate types available in 3E.
TUTORIAL
FLORIDIAN SALONS D & E

TUESDAY, JUNE 6, 2017

10:30 am – 11:30 am
Implementation Readiness Services Overview
Presented by Daniel Martinez, Val Brady, and Cindy Young
Are you wondering how to start developing a strategy to move to 3E? This tutorial will help you develop a vision by identifying the business needs that drive 3E value such as your current pain points, critical business processes, and success criteria. We will take you through a combined technical and application session, including a review of a checklist on what can be done today to prepare for your 3E implementation, while still delivering value in Enterprise.
TUTORIAL
FLORIDIAN SALON B

11:45 am – 12:45 pm
Learn from your Peers: Our 3E Experience
Presented by Charles Furness-Smith, Director of Finance, Nabarro LLP
In this session, a long-term Enterprise customer now live on 3E for 6 years will discuss topics such as their favorite 3E features as well as things you should be thinking about now to make the transition as smooth as possible.
FLORIDIAN SALON B

1:45 pm – 2:45 pm
Paperless Proforma for Enterprise and 3E
Presented by Karen Altnow
We will discuss making the transition from the Enterprise version to the 3E version of Paperless Proforma. Attendees will get a sneak peek at 3E Paperless Proforma and a roadmap tour into the future of Paperless Proforma.
FLORIDIAN SALON B

FLORIDIAN SALON B

What are the Business Benefits of Moving to 3E?
Presented by Brigitte Miklaszewski, Betsy Esquivel, and Rob Burger, CAB member
Join our experienced team as they lay out the business benefits and transformative aspects of 3E.
FLORIDIAN SALON A
<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
<th>Presenter(s)</th>
</tr>
</thead>
</table>
| 3:00 pm – 4:00 pm | I Want My UDF! Custom Fields in 3E  
*Presented by Joseph Torres and David Goodrich*  
In this session, we will talk about how to handle User Defined Fields (UDFs) during your move to 3E. We'll cover best practice considerations for looking at existing fields or creating custom fields in 3E - in addition to discussing how this impacts your conversion and template development. | FLORIDIAN SALONS D & E |
| 3:00 pm – 4:00 pm | Top 10 Reasons to Move to 3E  
*Presented by Betsy Esquivel*  
In this session, we'll go over some Enterprise favorite features that are even better in 3E! | BONNET CREEK SALONS XI & XII |
| 3:00 pm – 4:00 pm | Data Structures: Tables Versus Archetypes and Framework  
*Presented by Joseph Torres and Charles Zack*  
Join us as we compare the Enterprise data structures to 3E. You'll get an overview of the 3E data structure set and see how it differs from Enterprise. | FLORIDIAN SALONS D & E |
| 4:30 pm – 5:30 pm | Technical Infrastructure: Understanding the 3E Product Systems Requirements  
*Presented by Marcus Huddleston and Scott Strachan*  
Join us for a stem-to-stern review of the 3E Product System Requirements (PSR). | FLORIDIAN SALONS D & E |
| 9:00 am – 10:30 am | Understanding the Enterprise to 3E Conversion Process  
*Presented by David Goodrich, Val Brady, and Kim Vickerman*  
Join us as we discuss the Enterprise to 3E conversion process. Topics covered will include: Elite's role versus the firm's role, what you can do to prepare, understanding what Elite covers, what to expect from each conversion, and understanding the Data Validation process (i.e., LDR, Data Validation and UAT). | FLORIDIAN SALON A |
| 9:00 am – 10:30 am | Moving to 3E: Fundamentals of Changes in Masking  
*Presented by Erika Price-Raute and Chris Collins*  
Join us as we compare Enterprise and 3E masking. You will learn how masking can be utilized, and improved upon, in 3E. | FLORIDIAN SALONS D & E |
| 11:00 am – 12:00 pm | Learn From Your Peers: Preparing For Your 3E Implementation  
*Presented by Jan Wong, Torys LLP*  
Are you interested in hearing about an active Enterprise to 3E implementation presented by the customer? If so, this is a session not to be missed! Learn how this firm prepared for and is executing their 3E implementation project including what's working, what didn't and areas to closely monitor. | FLORIDIAN SALON A |
| 11:00 am – 12:00 pm | Migrating From Enterprise to 3E with eBillingHub  
*Presented by Kasey Kellum*  
When taking on a project like transitioning from Enterprise to 3E, it's easy to overlook the potential impact on your e-billing process. Join us as we discuss what the process entails from the eBillingHub perspective and hear testimonials from customers who have already completed the migration. | FLORIDIAN SALON B |
**1:45 pm – 2:45 pm**

**Learn From Your Peers: Anatomy of an Enterprise to 3E Conversion**
Presented by Lene Robles, Director of Strategic Business Systems, Stinson Leonard Street and Randi Pyle, Business Systems Manager, Stinson Leonard Street
Are you interested in hearing about an Enterprise to 3E conversion from a customer who has recently gone live on 3E? Join us for a review of the process they followed, the challenges they experienced, and the efficiencies they gained.

**Making the Move with 3E Setups**
Presented by Janis Gaston and Kerry Vandermolen
Join us as we discuss improvements to the setup processes between Enterprise and 3E. 3E offers much more flexibility and control over the impact of setups. We will review enhancements in application and master file setups like statuses, offices, and departments. Additionally, we'll discuss VB Options vs. Overrides, Set System options, and finally Control Panels vs Financial Controls.

**3:15 pm – 4:45 pm**

**Making the Change with Reporting**
Presented by Jay Maclean and Charles Zack
Join us as we discuss improvements to the setup processes between Enterprise and 3E. 3E offers much more flexibility and control over the impact of setups. We will review enhancements in application and master file setups like statuses, offices, and departments. Additionally, we'll discuss VB Options vs. Overrides, Set System options, and finally Control Panels vs Financial Controls.

**Today Versus the Future: Advanced Billing Arrangements**
Presented by Ruben Linero and Janis Gaston
Join us while we explore how 3E and Enterprise differ when handling advanced billing arrangements, including multi-payor, splits, fixed fee, volume discounts and alternative fee arrangements.

**THURSDAY, JUNE 8, 2017**

**8:45 am – 9:45 am**

**Our Journey with MatterSphere: A Firm's Story**
Presented by Alister Wyld and Ben Boyes, Turner Padget
Join a law firm for a discussion on what led them to select MatterSphere and how the system is now helping practices and lawyers at the firm work better.

**General Ledger and Reporting**
Presented by Nancy Agpaoa and Marcus Brannon
Join us as we discuss the similarities and differences between Enterprise General Ledger and 3E.

**10:15 am – 11:15 am**

**Prepare to Launch: Know Your Customizations and Data Requirements**
Presented by Ed Markey and Avneet Sahni
When replacing a core business system, you need to know what your current customizations are – and what business benefits they provide – to ensure those requirements continue to be met. This session will assist you in identifying your current customizations such as integrations, reports, UDFs, and information distribution. Additionally, we'll cover how to handle custom data requirements in the new system.

**Conflicts**
Presented by Michael Wright
Considering moving to 3E soon? In this session, we will compare Enterprise Conflicts Manager and 3E Conflicts and review the benefits of 3E.
<table>
<thead>
<tr>
<th>Time</th>
<th>Event Description</th>
<th>Location</th>
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</thead>
<tbody>
<tr>
<td>11:30 am – 12:30 pm</td>
<td><strong>Paperless Proforma for 3E</strong>&lt;br&gt;Presented by Karen Altnow&lt;br&gt;Join Paperless Proforma Product Manager Karen Altnow as she shares a glimpse of Paperless Proforma for 3E and a roadmap tour into the future of Paperless Proforma.</td>
<td>BONNET CREEK SALON X</td>
</tr>
<tr>
<td>1:30 pm – 2:30 pm</td>
<td><strong>Making the Progression with Proformas and Bills - Part I</strong>&lt;br&gt;Presented by Marti Attanasio and Mary McCarthy&lt;br&gt;Join us as we discuss the similarities and differences in the billing process between Enterprise and 3E.</td>
<td>FLORIDIAN SALONS D &amp; E</td>
</tr>
<tr>
<td>3:00 pm – 4:00 pm</td>
<td><strong>Making the Progression with Proformas and Bills - Part II</strong>&lt;br&gt;Presented by Marti Attanasio and Mary McCarthy&lt;br&gt;Join us for part two of our discussion on the similarities and differences in the billing process between Enterprise and 3E.</td>
<td>FLORIDIAN SALONS D &amp; E</td>
</tr>
<tr>
<td>1:30 pm – 2:30 pm</td>
<td><strong>Look and Feel: The Major Differences between Enterprise and 3E</strong>&lt;br&gt;Presented by Ruben Linero and Kerry Vandermolen&lt;br&gt;Learn the advantages of using dashboards in 3E vs. the Enterprise Navigation Tree The business concepts and many of the processes translate beautifully. We will walk through commonly used Enterprise features like timekeeper, client matter, time, data searching, keyboard shortcuts, and calendars. Lastly, we'll demo 3E's equivalent features.</td>
<td>FLORIDIAN SALONS D &amp; E</td>
</tr>
<tr>
<td>3:00 pm – 4:00 pm</td>
<td><strong>Should I upgrade Enterprise or Move to 3E?</strong>&lt;br&gt;Presented by Patti Goettel and Brent Bourque&lt;br&gt;This session goes over the pros and cons of upgrading Enterprise to its latest version versus starting the progression to 3E project.</td>
<td>FLORIDIAN SALON K</td>
</tr>
</tbody>
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MONDAY, JUNE 5, 2017

1:00 pm – 3:00 pm

Database Basics for 3E Users
Presented by Charles Zack
This session is for the 'non-technical' 3E application user who wants to learn about how the 3E database works behind the scenes. We will cover the basic parts of an SQL query, including how to build simple SQL queries to find the data in a 3E process. TUTORIAL
BONNET CREEK SALONS XI & XII

Implementation Best Practices
Presented by Val Reece, Mark Calabrese, and Somesh Surapureddi
Come hear Elite's North American Regional Directors talk about successful 3E projects, the ins, outs and lessons learned from the folks responsible at a high level. Come ready to ask your questions in this interactive presentation. TUTORIAL
FLORIDIAN SALON K

3:15 pm – 5:15 pm

Mastering 3E Templates and Template Options
Presented by Chris Collins and Charles Zack
Join this session to review a wide variety of template options to understand their use and how you might consider your path forward. TUTORIAL
BONNET CREEK SALON X

3E for Global Firms
Presented by Randolph Nairn and Tina Pyselman
Business is global today and law firms conducting business on an international scale face the challenges of multiple jurisdictions, different risk and compliance regimes, multiple currencies, and differing tax requirements. Join our experienced consultants to learn how 3E enables global firms to manage their operations and reporting in ways that satisfy both the firm’s global needs and its regional requirements. TUTORIAL
FLORIDIAN SALON L

TUESDAY, JUNE 6, 2017

10:30 am – 11:30 am

3E Product Roadmap
Presented by 3E Product Management Team
Hear directly from the 3E Product Management team about 3E current and future plans. This roadmap session will focus mainly on the 3E applications, with a lighter emphasis on Framework and technology. Please attend the separate '3E Technology and Framework Roadmap' session for a more in-depth look at those areas. TUTORIAL
BONNET CREEK SALONS XI & XII
<table>
<thead>
<tr>
<th>Time</th>
<th>Session Title</th>
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<th>Presenter(s)</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>11:45 am –</td>
<td>Design Gallery Roadmap</td>
<td>FLORIDIAN SALON A</td>
<td>Jason Taylor</td>
<td>Many exciting things are happening with Design Gallery. Come see where the product is going by getting a glimpse at our roadmap of new functionality planned for future releases.</td>
</tr>
<tr>
<td>12:45 pm</td>
<td>3E Technology and Framework Roadmap</td>
<td>BONNET CREEK SALONS XI &amp; XII</td>
<td>Jerid Dupier, Ruby Lee, Gerry Lattimer, and Mark Gendein</td>
<td>Join this session to learn about Elite's plans for the future of 3E Framework and technology.</td>
</tr>
<tr>
<td>1:45 pm –</td>
<td>The Lawyer Experience: Workspace and Elite Mobile Demonstration and Overview</td>
<td>FLORIDIAN SALON F</td>
<td>Priya Ramaswamy and Paul Odette</td>
<td>View a live demonstration of how lawyers can get their job done using an intuitive user interface that seamlessly brings together 3E, MatterSphere, Elite Data Insights, and Business Development Premier data. You'll learn how you can empower your lawyers with automated client insight, let them access documents and enter time on the go, view dashboards and client and matter reports, interact with 3E processes, and more.</td>
</tr>
<tr>
<td>2:45 pm</td>
<td>Evaluate - Matter Pricing and Budgeting</td>
<td>BONNET CREEK SALON X</td>
<td>Rob Stote and Dan Wales, both of DW Reporting</td>
<td>Increasing client, regulatory, revenue and cost pressures mean that matter pricing and budgeting has quickly become one of the leading trends in the legal industry. To help you create and manage matter plans, and monitor the engagement in real time, DW Reporting are delighted to present Evaluate, a data-driven market leading solution available for both Enterprise and Elite 3E platforms. Using this tool, and aided by historical data, and user inputs - users can price, plan and manage complex matters seamlessly, yet intuitively, to maintain both client expectations and profitability.</td>
</tr>
<tr>
<td>1:45 pm –</td>
<td>3E Rates: How to Make Them Work for You</td>
<td>FLORIDIAN SALON L</td>
<td>Tina Pyselman and Ruben Linero</td>
<td>With complex rate demands and exceptions on the rise, this session will help you gain a better understanding of the standard and alternate billing rates hierarchy and options available in 3E.</td>
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<td>2:45 pm</td>
<td>Paperless Proforma for Enterprise and 3E</td>
<td>FLORIDIAN SALON B</td>
<td>Karen Altnow</td>
<td>We will discuss making the transition from the Enterprise version to the 3E version of Paperless Proforma. Attendees will get a sneak peek at 3E Paperless Proforma and a roadmap tour into the future of Paperless Proforma.</td>
</tr>
<tr>
<td>1:45 pm –</td>
<td>Experience the World of 3E Metrics Reporting</td>
<td>BONNET CREEK SALONS XI &amp; XII</td>
<td>Jay Maclean and Mark Benz</td>
<td>Come and learn how to use, configure, schedule, and apply retention of 3E Metrics. Predefined or customized metrics offer a view into the most recent system activity and make instant reporting a breeze.</td>
</tr>
<tr>
<td>2:45 pm</td>
<td>What's New in 3E Notify?</td>
<td>BONNET CREEK SALON X</td>
<td>Virginia Gleason</td>
<td>Join us to find out what's new and on the horizon for Notify. Learn about new customization options and dynamic formatting options.</td>
</tr>
<tr>
<td>1:45 pm –</td>
<td>Explore the Power of the 3E General Ledger</td>
<td>FLORIDIAN SALON L</td>
<td>Maria Gray and Bill Motter</td>
<td>Discover how GL Types, GL Books, and reporting units can be leveraged to meet the varying GL reporting requirements firms have today. Couple that with the power of Transaction Type Masking to explore the unlimited capabilities of meeting firm and local reporting needs. Also learn about GL cross-validation rules, one of the hidden gems of 3E GL.</td>
</tr>
<tr>
<td>2:45 pm</td>
<td>Experience the World of 3E Metrics Reporting</td>
<td>BONNET CREEK SALONS XI &amp; XII</td>
<td>Mark Gray and Bill Motter</td>
<td>Discover how GL Types, GL Books, and reporting units can be leveraged to meet the varying GL reporting requirements firms have today. Couple that with the power of Transaction Type Masking to explore the unlimited capabilities of meeting firm and local reporting needs. Also learn about GL cross-validation rules, one of the hidden gems of 3E GL.</td>
</tr>
</tbody>
</table>

The above text is a natural representation of the document as if you were reading it naturally.
3:00 pm – 4:00 pm

Design Gallery v3 in Action
Presented by Jason Taylor and Dave McKay
Design Gallery version 3 is a major release which includes fundamental changes to how documents are created and distributed. Join us for a detailed demo that will guide you through the new v3 experience. You will see how you can take control of your entire document automation processes and do things not possible with v2.

Conversion and Migration Bootcamp: Practical Tips to Help You Prepare for New Practice Management Software
Presented by Shishir Shetty, Rob Beisswenger and Russ Haskin, all of Wilson Legal Solutions
It only makes natural sense that when a firm goes through a practice management conversion or migration their first goal is to make sure they can produce the same results that they had with previous versions. However, many clients realize after the fact that there were inherent opportunities to improve and align processes, advance deliverables, and strategically use the conversion as way of betterment for the firm. Wilson Legal Solutions and it’s team is well versed in working with firms to identify opportunities for improvement while establishing a solid plan to bring the firm through a conversion or migration with as much benefit as possible. This informative session will feature experts at Wilson Legal as they lead an interactive discussion on how best to position your firm when taking on these engagements. Discover practical tips on how to avoid the pitfalls that can lengthen many of these engagements while discovering the additional benefits. Join in a real world case study illustrating the need for proactive planning well before an engagement starts.

Workspace and Mobile: What’s New and Product Roadmap
Presented by Priya Ramaswamy and Paul Odette
Come find out where Elite is and where it’s going with Workspace and Mobile – the lawyer user experience that brings together 3E, MatterSphere, Elite Data Insights, Business Development Premier, and other applications within your firm.

AP/GL Roundtable
Presented by Maria Gray and Bill Motter
Join us for a roundtable discussion with subject matter experts on accounts payable and general ledger best practices and uses.
4:30 pm – 5:30 pm

Elite Integration Framework Data Sync: How to Implement Bi-directional Syncs with Elite and Third-Party Applications

Presented by Brad Reaves and Darren Baldwin
This is an in depth technical overview explaining how to implement bi-directional data integrations between Elite products such as 3E and MatterSphere, and also 3rdy party applications.

FLORIDIAN SALON A

Law Firm Profitability: Trends and Dynamics from a Global Market Perspective

Presented by Tom Jones, Founder and President, Iridium Technology
This session will provide an executive overview of the latest insights and business drivers in law firm profitability analysis and reporting with the global legal market. The briefing will be led by Tom Jones, President of Iridium Technology. Iridium provides business intelligence and profitability solutions for law firms in the US, APAC, and UK/EMEA. The firms cover all sizes, from single-office to multi-national. This session will highlight the current trends and upcoming developments for profitability analysis and reporting by firms in the US and other regions. The session will include numerous "mini case studies" to show how the trends are being applied by firms.

FLORIDIAN SALON K

Jump Starting Your Project (3E or Enterprise) – Key Points to Consider Before Your Project Starts

Presented by Deb West and Terry Hornung, both of Source Consulting Group, LLC
Are you ready to take the leap? Whether that leap is to implement 3E or upgrade your current environment, (3E or Enterprise), there are discussions that can be had and tasks that can be completed, prior to your project kick-off, that will jump start your project and give you the key factors you need in gauging the success of your project. Source Consulting Group has assisted many clients with their 3E implementations as well as with upgrades to both 3E and Enterprise. Join us as we share some of our suggestions on how to get your project started on the right track and completed successfully.

FLORIDIAN SALON B

Checking in on Elite and the Cloud

Presented by Ruby Lee, Greg Nilsen, Kyra Olson, Maurice Williams, Mark Gendein, and Gerry Lattimer
Need an update on 3E and other LES products going to the Cloud? This session will also cover the latest Cloud product trends and how Elite products are taking advantage of Cloud technology.

BONNET CREEK SALONS XI & XII

3E FX Revaluation

Presented by Bill Motter and Maria Gray
Join us for a detailed review of the FX revaluation process and the calculations behind the revaluation values.

FLORIDIAN SALON L

Risk Management Roundtable

Presented by Virginia Gleason and Janis Gaston
Join this client roundtable discussion to talk about what you can do to eliminate issues. Additionally, we'll discuss what information should be entered on an entity and how to ensure that you have your New Business Intake streamlined for your firm.

BONNET CREEK SALON X

3E Financial Reporting

Presented by Lisa Brown and Randolph Nairn
Designed for accounting professionals, this Microsoft® Excel®-based application offers advanced analytical features and highly formatted financial statements while providing users' control over creation, integration, and maintenance. Learn about the new 2.x user interface and advanced reporting capabilities.
9:00 am – 10:30 am

Moving from Document Studio to Design Gallery
Presented by Matt Klem and Randy Roy
Thinking about moving to Design Gallery? In this session, we will discuss all of the key items you need to know about moving to Design Gallery v3 from Document Studio. We'll cover everything about the upgrade path, from solution development, to server set up and configuration. TUTORIAL

FLORIDIAN SALON F

3E Workflows
Presented by Mithat Mese and Harun Diri
Come join us for a live demo to show how to create workflows from scratch. We will also go over stock workflow configuration, what to watch out for when creating new workflows, and much more. TUTORIAL
FLORIDIAN SALON F

11:00 am – 12:00 pm

3E Ad-Hoc Reports
Presented by Avneet Sahni and Prashant Bhuptani
Learn how to create Ad-hoc reports in 3E with the Integrated Development Environment (IDE) using standard, view, or metric archetypes as data sources. We will also talk about what the best data sources are to get report data and what conditions must be applied. TUTORIAL
FLORIDIAN SALON F

3E and MatterSphere: Enhance Your New Business Request Process – and Manage More than Just Conflicts!
Presented by Paul Odette and Brad Reaves
Come see how MatterSphere, paired with 3E, provides the smooth and efficient business request process your lawyers and secretaries demand. You'll also learn about additional key integration points between 3E and MatterSphere and how they can work together to make your practice run more smoothly. TUTORIAL
JACKSON

What's New and What's Next for 3E Conflicts
Presented by Virginia Gleason
Join us to find out what's new and on the horizon for Conflicts. TUTORIAL
BONNET CREEK SALON X

Image Connect Integrations
Presented by Michael Wright
Are you taking full advantage of Image Connect’s features and capabilities? Come find out about integration options and advanced tips and tricks to increase your return on investment. TUTORIAL
FLORIDIAN SALON L

xcelerate Budgeting and Forecasting and NEW Cost to Serve Module
Presented by Jag Dhariwal, Vice President of Global Sales, OLAP Vision
The NEW xcelerate Cost to Serve module – extend your investments and learn how xcelerate helps your firm calculate profitability with flexibility and ease! Learn how xcelerate Budgeting and Forecasting, built for 3E and Enterprise customers, can help your firm protect profits with real-time budget insight and skyrocketing efficiency and accuracy. Come hear customer case studies and exciting new announcements. TUTORIAL
FLORIDIAN SALON K

3E Billing Process Models
Presented by Marti Attanasio
This session covers the flow of data through the most common 3E billing processes such as Proforma Edit, Bill Generation, Time Entry, and more. TUTORIAL
FLORIDIAN SALONS D & E
1:45 pm – 2:45 pm

**Troubleshooting a Design Gallery Environment**  
*Presented by Matt Klem and Dave McKay*

Why didn't that invoice generate? Where's my print job? These are common questions asked by Design Gallery users. In this session, we'll discuss a range of concepts around how to best troubleshoot your Design Gallery environment.

**Improving the 3E Balancing Experience**  
*Presented by Erika Price-Raute and Mary McCarthy*

Since 2.7.2, we've been adding new balancing functionality that helps you streamline your month-end balancing. Discover the new 3E Month End Processing Dashboard that steps you through the activities needed to complete transaction processing, closing unit periods, and scheduling balancing reports. Experience efficiencies with the new At-a-Glance dashboard and the supporting drill-downs to help pinpoint discrepancies.

**Elite Unplugged!**  
*Moderated by Rob Burger*

You want answers? We've heard you loud and clear that you want to hear “non-corporate speak” to your lingering questions and concerns. Please join Robert Burger with Sterne Kessler Goldstein & Fox as he puts the Elite Executive Management team on the “hot seat” and facilitates a direct and thought provoking conversation. Rob will be asking questions collected directly from Elite customers, and has pledged to put the Executive Management team to task and not let them dodge any of your questions! This session is bound to be lively and interesting as everything from strategy to tactical initiatives, that will help shape the future of law firms and Thomson Reuters Elite products, are explored.

3:15 pm – 4:45 pm

**Introduction to Design Gallery Processes**  
*Presented by Matt Klem and Jason Taylor*

With Design Gallery v3 we introduced processes to provide flexible control over your document and distribution requirements. In this session we'll cover how processes work, how to create them, and how to maximize their use.

**International Payments and Elite Integration – A Revolution of Process Improvement!**  
*Presented by Anthony Loiacono, Co-Founder, Global Exchange*

In today's global economy, managing risk by protecting the firms' international payment and cost recovery process is not only smart – it's essential. This session focuses on the "Invoice » Billing » Payment" life cycle, including: ONEStepSM invoice processing, data capture, exchange rate protection, EnhancedFX Elite integration, compliance protection, vendor remittance & global funds transfer. This addresses knowing what it has been billed in matter currency – without currency fluctuation risk when the payment is due. As a pioneer of direct invoice processing, Global Exchange transcends the existing law firm workflow into an improved process. This enables firms to maintain 100% control of the process with full integration into Elite. Discussion topics include: • Current issues facing cost recovery for international payments. • Elite integration without exchange rate, billing or accounting constraints. • Practical, effective strategies to implement an improved international payment environment. • How to implement a system to ensure the integrity of the firm is protected.
Elite Data Insights  
**Presented by Lisa Brown and Marc Solomon**  
Join us as we showcase our business intelligence product offering powered by the Elite Data Warehouse (EDW). Learn to leverage the robust functionality of Microsoft Power BI for rich data visualizations, clients will be able to quickly deliver actionable and impactful reports. Take advantage of our standard insight dashboards and reports to measure firm performance and trends, incorporate data outside of 3E, and learn how the service EDW Console will allow firms to bring in custom tables and fields as well as non-3E-datasets.

Real-world 3E Customizations  
**Presented by Prashant Bhuptani and Joseph Torres**  
Join us for a walk-through of some real-world examples of how a firm can customize 3E. We will talk about making minor modifications like turning on attachments and auditing and discuss best practices approaches to customizations, including coding standards. Leverage the best practice standard techniques for customizations and make it easier to obtain the needed support from the onset.

8:45 am – 9:45 am  
**BONNET CREEK SALON X**

What’s New in 3E Billing  
**Presented by Marti Attanasio and Karen Altnow**  
Join us as we discuss what’s new with 3E Billing in the 2.8.1 release, including Time Capture enhancements and eBillingHub validation rules.

**FLORIDIAN SALON L**

THURSDAY, JUNE 8, 2017

Using Design Gallery’s Visual Designer  
**Presented by Matt Klem and Jason Taylor**  
In this session we will provide a general introduction on how to use Design Gallery’s MS Word-like design tool, Visual Designer. In addition, if you have already legacy components in Design Gallery written in XSL code, this session will also look at taking these XSL components and migrating them into Visual Designer making them easier to modify in the future.

**BONNET CREEK SALONS XI & XII**

Our Journey with MatterSphere: A Firm’s Story  
**Presented by Alister Wyld and Ben Boyes, Turner Padget**  
Join a law firm for a discussion on what led them to select MatterSphere and how the system is now helping practices and lawyers at the firm work better.

**FLORIDIAN SALON J**

Volume Discounts and Alternative Fee Arrangements: How and When to Use Them  
**Presented by Rhonda Compher**  
Today’s clients are asking for new large volume discounts and alternative fee arrangements, in addition to all of the rate structures. Come find out how to use the 3E volume discounts and alternative fee arrangements and see how to make them work for you.

**FLORIDIAN SALON L**

The Power of 3E Masking  
**Presented by Erika Price-Raute and Mary McCarthy**  
Discover the power of 3E Masking. 3E can post differing GL entries to multiple sets of books (i.e., GL Types) for a single transaction. This concept supports GL postings for various statutory requirements as well as differing firm requirements.

**BONNET CREEK SALON X**

Matter Planning and Pricing  
**Presented by Russ Holmes, Cosine**  
Built directly within the 3E Framework, Cosine’s Matter Planning and Pricing module has at its foundation all of 3E’s comprehensive client and matter management capabilities. The module delivers industry leading matter planning and pricing functionalities whilst accessing native rates, budgeting and other 3E features to deliver for the first time an elegant real time solution for 3E clients. See how it can help your firm deliver on time and on budget.

**FLORIDIAN SALON K**

What’s New in AP/GL and Collections  
**Presented by Maria Gray and Bill Motter**  
Learn about the exciting features recently delivered for AP/GL and Collections.

**FLORIDIAN SALON L**
10:15 am – 11:15 am

ClientPay 2.0: Next Generation Payment Processing for Next Generation Law Firms
Presented by Ryan Beck, Vice President, and Vince Arnoldi, both of ClientPay

Today’s top law firms are hungry for new technology advancements that will transform the way they do business. Join us to discover how our industry leading, next generation, credit card processing service makes invoicing and billing clients easy for you and easy for them. Hear how ClientPay’s newest platform, to be rolled out soon, will revolutionize recurring billing, enhance your client’s payment experience, and provide firms the custom fields needed to successfully report on transactions. Did you know that ClientPay’s Transaction Optimizer technology is helping Thomson Reuter’s Elite firms save an average of 23% on their payment processing fees? Don’t miss out on this next generation technology.

FLORIDIAN SALON K

3E Billing and GL Metrics from Support’s Perspective
Presented by Marcus Brannon and Jonathan Chin

Do you have questions on how to navigate through running a metric? Come hear what the most commonly requested standard Billing and GL Metrics are, and how you can use them to gain better insights into your financial picture.

FLORIDIAN SALON XI & XII

Security in 3E
Presented by Gerry Lattimer

Join us for a discussion of the current and future 3E security features.

FLORIDIAN SALON F

11:30 am – 12:30 pm

Data Visualization with Microsoft’s Power BI
Presented by Lisa Brown and Marc Solomon

Bring your data to life with Microsoft’s Power BI Visualizations. With Power BI you can let your data tell a compelling story with rich data visualizations. See how easy it is to create new and modify existing visualizations and learn how Power BI fits inside the new Elite Data Insights solution.

FLORIDIAN SALON L

ARCS3: Implementing & Managing Financial Strategies
Presented by Joe Zoghbi, MiniSoft, Inc.

How you can efficiently and effectively implement strategic account management solutions.

FLORIDIAN SALON K
1:30 pm – 2:30 pm

**Paperless Proforma for 3E**  
*Presented by Karen Altnow*  
Join Paperless Proforma Product Manager Karen Altnow as she shares a glimpse of Paperless Proforma for 3E and a roadmap tour into the future of Paperless Proforma.

**Best Practices for 3E Conflicts**  
*Presented by Tina Pyselman and Michael Wright*  
Learn how to set up and configure 3E Conflicts and the New Business Intake workflow to meet your firm's unique needs and requirements.

**3E - Top Troubleshooting Tips by Support**  
*Presented by Jonathan Chin and Marcus Brannon*  
Come get Support's top tips on how to troubleshoot the most common problems, like how to interpret error messages, how to read the error on the logs, and how to resolve common Posting and Billsum errors.

**Anticipating your Successful 3E Implementation: Resources, Work Load, Focus Area, and Partnership**  
*Presented by Rhonda Compher, Cindy Young, and Marcus Huddleston*  
Hear from senior services staff on taking ownership and partnering during your 3E implementation.

**What's New with 3E Framework and the Elite Service Bus**  
*Presented by Gerry Lattimer and Mithat Mese*  
This session will provide an overview of the new 3E platform and Elite Service Bus features in recent releases.

**The Myths & Realities of Time Entry: A Roundtable Discussion**  
*Presented by Gabriela Isturiz, Co-Founder and President, and Matt Yezovich, Director of Sales, both of Bellefield Systems and Matt Yezovich, Director of Sales*  
Join Gabriela Isturiz, President of Bellefield Systems, and Matt Yezovich, Director of Sales, for a roundtable discussion on the challenges and solutions to timekeeping in the modern law firm. These industry-recognized thought leaders will touch on time entry as it relates to integration, firm adoption, revenue, and ROI including: how using time entry data has helped them make better decisions throughout the firm, how technology has helped them manage compliance with their time entry policy, and what's on the horizon for the most innovative firms.

**Our Favorite 3E Features**  
*Presented by Phillip Underwood*  
Join Elite's front-line product subject matter experts to hear some of their favorite features. This is a good session for new customers getting an understanding of 3E as well as established customers looking for ways to be more efficient with the system and business processes.

**3E 2.8 Pilot Participants Retrospective**  
*Presented by Mark Burt, GableGotwals and Melanie Humphrey, Quinn Emanuel*  
Hear from two participants in the 3E 2.8 pilot program to understand why they took part and their viewpoints on the pilot overall and the 2.8 upgrade in particular.

**Taxes Needn’t Be Taxing**  
*Presented by Randolph Nairn and Tina Pyselman*  
Come learn all about 3E Taxes. This session covers Taxes masking, Taxes and Tax Codes, Tax Reporting, Tax Clearing and Tax remittance to the authorities, Reverse Charges, Withholding Taxes, and the Tax Area Matrix.
3:00 pm – 4:00 pm

**3E Integrations: BizTalk and Webservices**

*Presented by Avneet Sahni and Ed Markey*

This session will cover how to use standard integrations, Webservices, as well as the benefits of using BizTalk and how to reduce your costs for integrations.

FLORIDIAN SALON B

**3E Reporting A-Z**

*Presented by Jay Maclean and Mark Benz*

Join this session to get a better understanding of the basics, and how to utilize soft reports, inquiries and lists to get at your daily data. This session will also cover some pointers and subtle features within 3E Reporting that can help simplify the data gathering process in 3E.

FLORIDIAN SALON L
## MONDAY, JUNE 5, 2017

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<td>Common E-Billing Mistakes Managers Should Know About ...</td>
<td>Enterprise Interim Billing Best Practices</td>
<td>Document Studio Maintenance and Advanced Template Design</td>
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<td>Database Basics for 3E Users</td>
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<td>E-Billing Best Practices for E-Billers and Managers</td>
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<td>Understanding Enterprise Framework Tools and Screen...</td>
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<td>Reading Your Enterprise Data for a 3E Conversion</td>
<td>Mastering 3E Templates and Template Options</td>
<td>3E for Global Firms</td>
<td>Elite’s Proven Implementation Methodologies</td>
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<td>3E Administration, Performance, and Troubleshooting</td>
<td>3E Technology and Framework Roadmap</td>
<td>3E Rates: How to Make Them Work for You</td>
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## TUESDAY, JUNE 6, 2017

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<td>Implementation Readiness Services Overview</td>
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<td>Enterprise Multipayor Best Practices</td>
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<td>Design Gallery Roadmap</td>
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<td>The Lawyer Experience: Workspace and Elite Mobile Demonstration...</td>
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<td>Moving to 3E: Fundamentals of Changes in Masking</td>
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<td>The Power of Bicycles: How Listening to Your End Users Is Key to...</td>
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**THURSDAY, JUNE 8, 2017**

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<td>8:45 am</td>
<td>Getting the Most Value from Your Elite Partnership</td>
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<td>Our Journey with MatterSphere: A Firm’s Story</td>
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11:30 am | 12:30 pm

Enterprise
- Data Visualization with Microsoft’s Power BI
- Enterprise Data Warehouse Reporting
- Paperless Proforma for 3E
- Anticipating your Successful 3E Implementation: Resources, Work...
- Enterprise Split Billing Best Practices
- Making the Progression with Proformas and Bills - Part I
- Enterprise Billing Rates Best Practices
- Making the Progression with Proformas and Bills - Part II
- 3E Top Troubleshooting Tips by Support
- Best Practices for 3E
- Taxes Needn’t Be Taxing

Business Development
- How to Make Your Lawyers Love You
- Look and Feel: The Major Differences between Enterprise and 3E
- Best Practices for 3E
- Our Favorite 3E Features
- 3E 2.8 Pilot Participants Retrospective
- 3E Integrations: BizTalk and Webservices

1:30 pm | 2:30 pm

Enterprise
- eBillingHub: Going Native in Microsoft Azure
- How to Extend Workspace and Mobile
- The Myths & Realities of Time Entry: A Roundtable Discussion
- Making the Progression with Proformas and Bills - Part I
- Enterprise Billing Rates Best Practices
- Making the Progression with Proformas and Bills - Part II
- 3E Reporting A-Z

Business Development
- Managing Your CRM Universe to Maximize Relevance and Impact

3:00 pm | 4:00 pm

Enterprise
- Workshop and Mobile: Deep Dive on Time Entry
- Cyber Security Arms Race
- Breaking Down the Data Silos: Why Time & Billing Data is Important...
- Making the Progression with Proformas and Bills - Part II
- 3E Reporting A-Z

Business Development
- Managing Your CRM Universe to Maximize Relevance and Impact