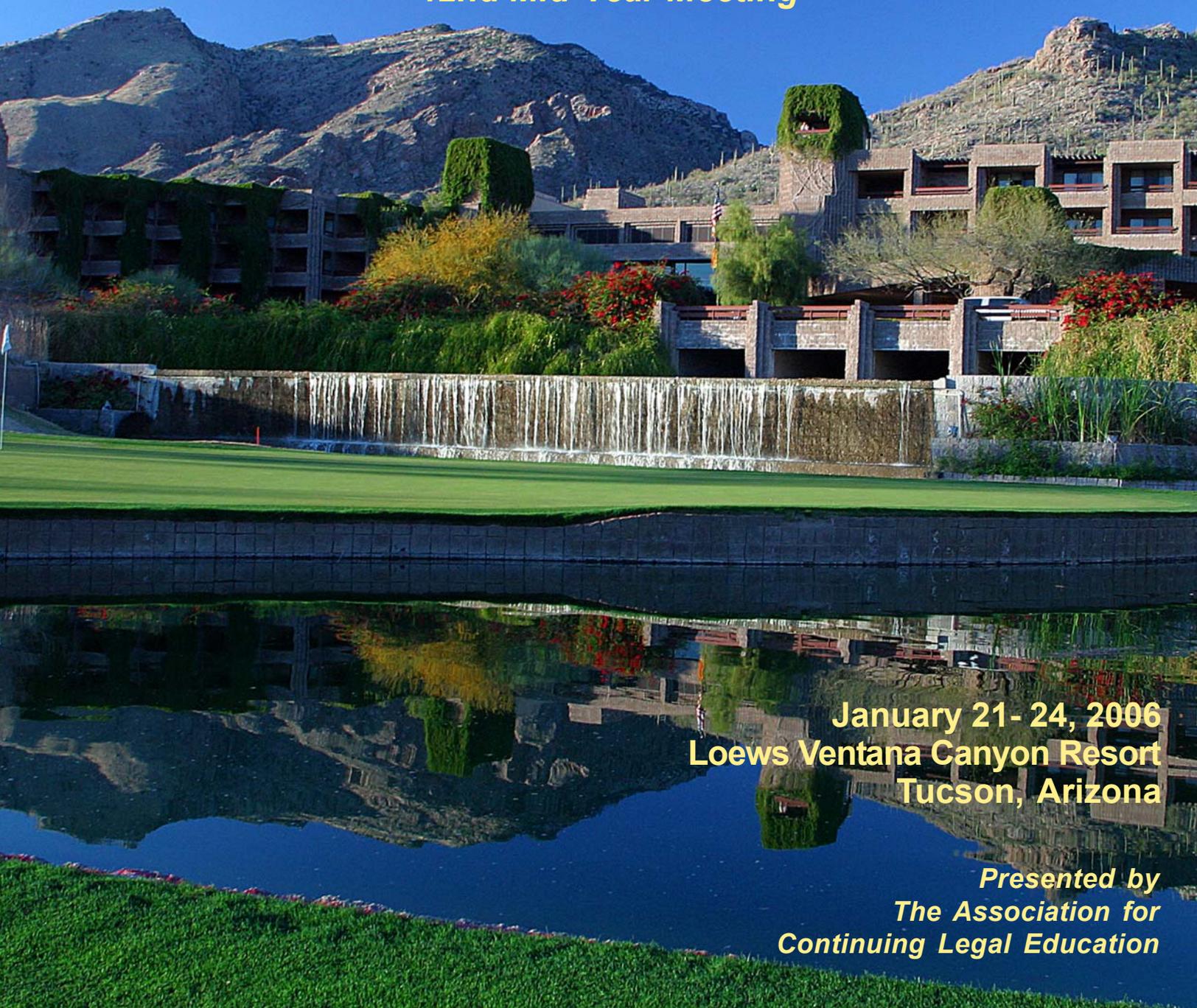




The Network for CLE Professionals...Worldwide

## **CLE UNTRACKED**

*Marketing, Technology & CLE Business Management  
42nd Mid-Year Meeting*



**January 21- 24, 2006  
Loews Ventana Canyon Resort  
Tucson, Arizona**

*Presented by  
The Association for  
Continuing Legal Education*

# Why You Should Attend:

*A Message From the Planning Committee*

## CLE UNTRACKED

### Marketing, Technology & CLE Business Management

ACLEA's 42nd Mid-Year Meeting, at the spectacular Loews Ventana Canyon Resort in Tucson, promises to be different from any other ACLEA meeting you have ever attended – and, we think, the most educational for all members of the ACLEA family. The Tucson Planning Committee has adopted a new approach to programming that has been designed to be more responsive to your needs as professionals. This meeting will feature top-drawer speakers with dynamic follow-up breakout sessions that harness the energy of the plenary sessions. Take the dynamics of the plenary session into a breakout designed for you and your organization. Apply the information to your work life. Negotiating, Marketing, Technology – topics that affect us all - will be presented first in the informational format of a plenary, then reinforced in interactive breakouts to enhance the learning experience.

Our perennially successful CLE Boot Camp on Saturday is followed by the new member and faculty reception. On Sunday, nationally recognized speakers Rikki Klieman of Court TV and William Bratton of the Los Angeles Police Department kick off three days of learning opportunities and entertaining social events that you won't want to miss. The additional plenary speakers we have lined up will address key areas of interest to all CLE professionals:

- ◆ Gain the Edge!® Negotiation Strategies for ACLEA Members – Martin E. Latz, Latz Negotiation Institute, Scottsdale, AZ
- ◆ Technology Is Here To Stay — Whether We Like It Or Not! – Monica Bay, Law Technology News, New York, NY
- ◆ Strategies and Techniques to Get People to Register Now – Ralph Elliott, Clemson University, Clemson, SC

Check out the “Conference at a Glance” to see that we're providing great programming for members of every interest area in ACLEA. We look forward to seeing you in Tucson!

### *Special Thanks to the Tucson Planning Committee*

Frank V. Harris—Minnesota CLE

Kent R. Hopper —The Missouri Bar

John M. Reilly—Massachusetts CLE, Inc.

Mark Rosch—Internet for Lawyers

Ginger Shepard—Illinois Institute for CLE

Donna J. Passons—ACLEA Executive Director

Thomas E. Dixon, Jr. (Planning Committee Co-Chair)—State Bar of Wisconsin

J. Craig Shaw (Planning Committee Co-Chair)—The Florida Bar

# Special Events Schedule

## Saturday, January 21, 2006

9:30 a.m. – 3:30 p.m.

### Day Trip to Mission San Xavier del Bac and Old Town Artisans

Often called “The White Dove of the Desert,” the Mission San Xavier del Bac was built by the Jesuits from 1783 to 1797. It was established by the “Padre on Horseback,” Father Kino. The 200-year-old structure is recognized as one of the finest examples of mission architecture in the country. The mission still serves its Native American parishioners, which makes it unique in the former Spanish southwest mission system. More information on this great example of Tucson history can be found at [www.sanxaviermission.org](http://www.sanxaviermission.org). After your visit to the mission, we travel to Old Town Artisans. This historic 1850s adobe building houses an entire block of distinctive shops, as well as a restaurant. The 15-room marketplace features contemporary and traditional works of hundreds of artists and craftsmen, including Native American tribal art and imports from Latin American cultures. Details about the shops and restaurant can be found at [www.oldtownartisans.com](http://www.oldtownartisans.com).



Our bus will depart from Loews Ventana Canyon Resort’s Grand Ballroom foyer promptly at 9:30 a.m. You’ll begin with a self-guided tour of the Mission San Xavier. The bus will leave the mission at 12 noon and continue the day trip at the Old Town Artisans allowing 2 ½ hours for visiting the shops and restaurants. The bus will depart from Old Town Artisan at 3:00 p.m. for the return trip to the Loews Ventana Canyon Resort. Cost per person is \$18.00 with a minimum of 20 people required. Please make your required reservations on your registration form. This fee does not include lunch.

4:30 p.m. – 6:30 p.m.

### New Member and Faculty Reception

ACLEA members and their registered guests join together to welcome new members to the organization and to show support for the Tucson, Arizona faculty.

## Sunday, January 22, 2006

6:00 p.m. – 9:00 p.m.

### Dinner with Entertainment by Mike Rayburn – “The World’s Funniest Guitar Virtuoso”

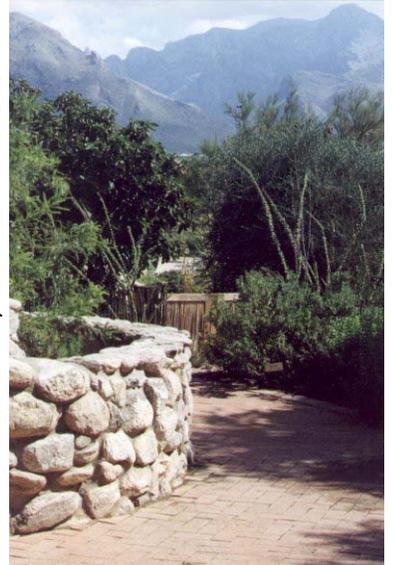
Classically Trained, *Comically Derailed*...there’s nothing else like it! Mike Rayburn’s critically acclaimed presentation is an odyssey of masterful guitar, clean, universally appealing comedy, and musical combinations God never intended. “*A comic genius... enough wit and talent to jumpstart a pacemaker!*” raves the Aspen Daily News. Mike is a regular at **Carnegie Hall**, receiving standing ovations at every performance. He has been featured in USA Today, Newsweek, and Billboard. As part of your conference fee, all ACLEA attendees are invited to join us at the conclusion of the first day of sessions for dinner and drinks prior to the show. Guest tickets are available for \$75.00. Please make your required reservations on your registration form.

## Monday, January 23, 2006

3:00 p.m. – 8:00 p.m.

### Networking Excursion to Tohono Chul Park and La Encantada Shopping Center

Listed by *National Geographic Traveler* as one of the top Secret Gardens in the U.S. and Canada, this 49-acre nature preserve houses exhibits, galleries, museum shops and greenhouses, along with scenic trails and botanical gardens. During a docent-led tour through the park, you’ll encounter views of the Pusch Ridge, Santa Catalina Mountains, and numerous plant and animal species native to the region. Experience the beauty of Tohono Chul Park, recently named a State Treasure by the governor of Arizona. After your visit to the park, it’s off to the La Encantada Shopping Center. An open-air center with more than 50 upscale shops and restaurants, La Encantada features intimate courtyards, spacious patios and majestic views of the Catalina Foothill Mountains.



The bus will depart for the Tohono Chul Park from the Loews Ventana Canyon Resort’s Grand Ballroom foyer promptly at 3:00 p.m. The bus will leave the park at 5:00 p.m. and continue to the La Encantada Shopping Center. The bus will then begin looping between the center and Loews Ventana Canyon Resort, with a final pick up from La Encantada at 7:45 p.m. for drop-off at the resort by 8:00 p.m. Cost per person is \$25.00. Please make your required reservations on your registration form.

## Tuesday, January 24, 2006

6:30 p.m. – 9:30 p.m.

### ACLEA’s Closing Event

Pull up a stool with your ACLEA colleagues in an “Old West Saloon” for an evening of outstanding entertainment. The Manuel Inter-Tribal Dancers kick off the evening with meaningful performances of Native American Indian dances from the plains tribes. Then a cowboy crooner takes us on an acoustic journey through the history of Western music as he strums his way through musical favorites in *Songs of the West*. And what Old West Saloon would be complete without poker, blackjack, and pool tables? Don’t get caught hiding an ace up your sleeve in these friendly card games! There are no six-shooters allowed of course, but you can shoot a game of pool if you get the hankerin’. So lasso up your colleagues and mosey on down for an exciting evening in the Old West. Tickets for registrants are included in the registration fee. Guest tickets are available for \$50.00. Please make your required reservations on your registration form.

## Saturday, January 21, 2006

- 7:45 a.m. – 4:30 p.m.  
Registration Desk Open
- 8:15 a.m. – 4:15 p.m.  
CLE Boot Camp
- 9:30 a.m. – 3:30 p.m.  
Day Trip to Mission San Xavier del Bac and Old Town Artisans (ticketed event)
- 4:15 p.m. – 5:30 p.m.  
Hawaii Planning Committee Meeting
- 4:30 p.m. – 6:30 p.m.  
New Member and Faculty Reception

## Sunday, January 22, 2006

- 7:15 a.m. – 5:00 p.m.  
Registration and Exhibits
- 8:30 a.m. – 9:30 a.m.  
Selected SIG Meetings (Law Schools, Publications)
- 9:00 a.m. – 9:45 a.m.  
MCLE Committee Meeting
- 9:30 a.m. – 10:00 a.m.  
Networking Break and Exhibits
- 10:00 a.m. – 10:20 a.m.  
President's Welcome - Paul F. Wood, ACLEA President
- 10:20 a.m. – 11:50 a.m.  
Plenary Session: Leadership and Change in the 21st Century  
*and* Fairy Tales Can Come True - How a Driven Woman Changed Her Destiny
- 12:00 noon – 1:25 p.m.  
SIG Chair, Committee Chair, and First Time Attendee Luncheon (ticketed event-by invitation only)
- 1:30 p.m. – 2:30 p.m.  
Plenary Session: Gain the Edge!® Negotiation Strategies for ACLEA Members
- 2:30 p.m. – 3:15 p.m.  
Networking Break and Exhibits
- 3:15 p.m. – 4:30 p.m.  
**BREAKOUT SESSIONS**
- ◆ Negotiating with Paid Speakers and Agents
  - ◆ Negotiating with Hotels
  - ◆ Negotiating in a Political Environment - Thoughtful Negotiation Techniques for Moving Ahead with Your Bar, Your Board, Your Governing Body
  - ◆ Negotiating with Volunteers - Be Prepared!
  - ◆ 30 (or so) Technology Terms, Tips & Tools in 60 Minutes
- 4:35 p.m. – 5:30 p.m.  
ACLEA/ORACLE Joint Working Group on MCLE Uniformity
- 6:00 p.m. – 9:00 p.m.  
Dinner with Entertainment by Mike Rayburn - "The World's Funniest Guitar Virtuoso"

### ***DID YOU KNOW YOU CAN...***

- Renew your membership dues online?
  - Search through articles from past conferences?
  - Upload and review samples of forms and brochures?
  - Find contact information for ACLEA members in the member directory?
  - Offer your products for bulk purchase and distribution to other ACLEA members?
- Check out these member benefits and other features of ACLEA's website at*

[www.aclea.org](http://www.aclea.org)

# Monday, January 23, 2006

7:30 a.m. – 3:00 p.m.

Registration and Exhibits

8:00 a.m. – 8:45 a.m.

ACLEA/ORACLE Joint Meeting - Roundtable Discussion

8:00 a.m. – 8:50 a.m.

SIG/Committee Meetings

(Exhibitors/Sponsors, International, Public Interest)

9:00 a.m. – 10:00 a.m.

Plenary Session: Technology Is Here to Stay -  
Whether We Like It or Not!

10:00 a.m. – 10:30 a.m.

Networking Break and Exhibits

10:30 a.m. – 11:45 a.m.

## BREAKOUT SESSIONS

- ◆ Podcasting
- ◆ Overcoming E-Mail Overload and Preserving Your E-Sanity
- ◆ Excel for Financials and Marketing
- ◆ Accessible Access! Using Microsoft Access for Marketing in Legal Publishing
- ◆ Identifying and Involving Sponsors and Exhibitors

11:50 a.m. – 1:25 p.m.

SIG Lunches (ticketed event - open to all registrants)  
(Executive Leadership, Marketing, Publications,  
Technology)

1:30 p.m. – 2:45 p.m.

## BREAKOUT SESSIONS

- ◆ Intranets - Easier Than You Think!
- ◆ Creating Word Templates for Course Materials and Forms
- ◆ Introduction to Adobe Acrobat 7.0 Professional
- ◆ Striking the “Right” Balance: Blending Paper and Electronic Marketing
- ◆ Overcoming E-Mail Overload and Preserving Your E-Sanity  
(Repeat Session)

3:00 p.m. – 8:00 p.m.

Networking Excursion to the Tohono Chul Park and La Encantada Shopping Center (ticketed event)

## Welcome to Tucson

### OPTIONAL EVENTS

Saturday, January 21, 2006

9:30 a.m. – 3:30 p.m.

Day Trip to Mission San Xavier del Bac  
and Old Town Artisans

Monday, January 23, 2006

3:00 p.m. – 8:00 p.m.

Networking Excursion to Tohono Chul Park and  
La Encantada Shopping Center

# Tuesday, January 24, 2006

8:00 a.m. – 4:00 p.m.

Registration and Exhibits

8:30 a.m. – 10:00 a.m.

ACLEA Business Meeting and Breakfast

10:00 a.m. – 10:30 a.m.

Networking Break and Exhibits

10:30 a.m. – 11:45 a.m.

## BREAKOUT SESSIONS

- ◆ Staff Transitions: Training and Retaining the Staff You Need
- ◆ Spin Doctors: Materials on Disk
- ◆ How to Write Titles and Copy That Will Increase Your Course Attendance (or Book Sales) - Guaranteed!
- ◆ “The Yellow Brick Road” - Using Integrated, One-2-One Messaging to Increase Attendance, Revenues and Profits

11:50 a.m. – 1:25 p.m.

SIG Lunches (ticketed event - closed to SIG members only)  
(In-House, Law Schools, Local & Specialty Bars,  
Nationals, State & Provincial Bars, The Un-SIGed)

1:30 p.m. – 2:30 p.m.

Plenary Session: Strategies and Techniques to Get People to Register Now

2:45 p.m. – 4:00 p.m.

## BREAKOUT SESSIONS

- ◆ How to Use an Integrated Marketing Mix to Increase Your Seminar/Conference Attendance
- ◆ Branding: Beyond the Logo
- ◆ Marketing for Non-Marketers
- ◆ Market Research: Understanding Lawyer Needs
- ◆ Using the Website as a Marketing Tool - Selling and Marketing Off and Around the Website

6:30 p.m. – 9:30 p.m.

ACLEA Closing Event - Dinner and Entertainment by the Manuel Inter-Tribal Dancers, along with *Songs of the West*

**NEW!**

*For the first time*, ACLEA is offering your choice of printed materials or materials on CD for use on-site during the conference *and* as a great addition to your office library! Be sure to make your selection by checking the appropriate box on the registration form. You cannot change your selection on-site, however you can purchase *both* the CD and printed versions for an additional \$50.

*Note: The CD materials do not include the CLE Boot Camp. If you have registered for the Boot Camp you will receive a printed version of the Boot Camp materials.*

**Saturday, January 21, 2006**

### *The CLE Boot Camp*

The CLE Boot Camp was created to assist our colleagues who are new to the profession and those who just need a refresher. The Boot Camp has met with rave reviews, and ACLEA is committed to continuing this service to its members. The sessions within the Boot Camp are basic level, and the overall curriculum is designed to help you in all areas of CLE programming and publications. We are delighted and thankful to have so many volunteers and “old-timers” help with these sessions. We know you will walk away with lots of information to help you in your own organization.

*Separate Registration Fee Required – Fee includes a continental breakfast, networking luncheon, materials, and a “certificate of attendance.”*

**Presiding:** Lisa Deane — State Bar of Arizona

#### **8:15 Continental Breakfast**

#### **8:30 Introductions and What You Hope to Gain as an ACLEA Member**

**8:45 Program Planning from A to Z** – contacts and resources; deciding on subjects, content, faculty and formats; budgeting and pricing; timelines and deadlines; analyzing your results.

Leslie Lynn Myers — Texas Institute of CLE

#### **10:00 Break**

#### **10:15 The Basics of Marketing CLE Products: From Ideas to**

**Follow-up** – An overview of a professional marketing approach for courses and books to attorneys utilizing your entire organization. Understand and utilize unique qualities of the attorney-market. Learn how to make connections that fit into a long term marketing plan consistent with your mission statement. Compare and discuss direct-mail, e-mail, and other forms of advertising. Develop titles and descriptions and consider the evolving world of our customers.

Vincent J. O’Brien — Minnesota CLE

**11:15 Technology and CLE** – Technology affects every aspect of the CLE organization. Learn how to maximize technology in your day-to-day operations, programming, marketing, publications, and website presence. Find out how your audience can contribute to the improvement of your technology products, and learn how to assess what type of technology “works” for your audience. Filled with tips and tricks, this session helps make the most of what you already have while also looking to the future of CLE and technology.

Ginger Shepard — Illinois Institute for CLE

#### **12:00 Networking Luncheon**

**1:15 Publications** – So you want to publish CLE books? Here’s an easy way to set up book publications, including finding authors, getting a manuscript written, editing, pre-press production, marketing and working with vendors to get your book printed.

Holly Garland Langworthy — Minnesota CLE

#### **2:00 Break**

**2:15 The MCLE Application and Reporting Process** – Are you being asked questions you simply can’t answer about different state MCLE requirements? Are you looking for ways to simplify the application and reporting process? Find out how to work with accreditation agencies.

David N. Shearon — Tennessee Commission on CLE & Specialization

**2:45 Finances** – Budgeting, expense monitoring, financial ratios, forms, check lists and insight on how to save money at your seminars and conferences.

Donna J. Passons — Texas Institute of CLE

Gail Seawright — Loews Ventana Canyon Resort

#### **3:45 Panel of Experts**

#### **4:15 Adjourn**

## **PRE-CONFERENCE EVENTS AND MEETINGS**

**9:30 a.m. – 3:30 p.m.**

#### **Day Trip to Mission San Xavier del Bac and Old Town Artisans (ticketed event)**

See Special Events Schedule for details. Depart from the Loews Ventana Canyon Resort’s Grand Ballroom Foyer at 9:30 a.m. for this day trip. **Cost per person \$18.00** with a minimum of 20 people required. Please make your required reservations on your registration form.

**4:15 p.m. - 5:30 p.m.**

#### **Hawaii Planning Committee Meeting**

**4:30 p.m. - 6:30 p.m.**

#### **New Member and Faculty Reception**

ACLEA members and their registered guests join together to welcome new members to the organization and to show support for the Tucson, Arizona faculty.

## **Sunday, January 22, 2006**

**7:15 a.m. – 5:00 p.m.**

#### **Registration and Exhibits**

**8:30 a.m. – 9:30 a.m.**

#### **Selected SIG Meetings**

Law Schools, Publications

**9:00 a.m. – 9:45 a.m.**

#### **MCLE Committee Meeting**

**9:30 a.m. – 10:00 a.m.**

#### **Networking Break and Exhibits**

**10:00 a.m. – 10:20 a.m.**

#### **President’s Welcome**

Paul F. Wood, ACLEA President

**10:20 a.m. – 11:50 a.m.**

#### **Plenary Session**

##### **Leadership and Change in the 21st Century**

The great leader, Gandhi, exemplifies the principle that to create change, you must become the change. For any profession to remain contemporary and relevant, its leaders and practitioners must embrace the concept that from the moment they enter their profession, they are on a journey that involves the continual embrace of change. Chief Bratton, one of America’s most significant police leaders, discusses the changing paradigm in his profession over the last 35 years, particularly since September 11th. His world is reflected in the new lessons, laws, and challenges for legal practitioners and those who teach them.

William J. Bratton - Chief of Police, Los Angeles, California

##### **Fairy Tales Can Come True – How a Driven Woman Changed Her Destiny**

The title of Rikki Klieman’s best selling book will be reflected in her discussion of tales of trial from being a warrior in a courtroom with a woman’s heart to the broadcaster’s cool reflection of viewing a trial through the lens of a courtroom camera. Named as one of the top five women trial lawyers in the country by TIME Magazine, and as a teacher of trial advocacy programs for over 25 years, she has participated in the creation of an evolving curriculum of tactics and strategies of trial advocacy programs. She also has learned and teaches all of us who are driven to succeed in our professional endeavors that life skills of balance and moderation must prevail for true success.

Rikki Klieman - Courtroom Television Network

12:00 noon – 1:25 p.m.

### **SIG Chair, Committee Chair, and First Time Attendee Luncheon (ticketed event)**

All Special Interest Group Chairs, Committee Chairs, and first-time conference attendees are encouraged to attend this luncheon for a great networking opportunity. *(By Invitation and RSVP only.)*

1:30 p.m. – 2:30 p.m.

### **Plenary Session**

#### **Gain the Edge!® Negotiation Strategies for ACLEA Members**

You negotiate every day. In fact, your ability to effectively negotiate may be the most critical skill you possess, whether it's negotiating with hotels, volunteers, or even paid speakers. Yet most negotiate instinctively or intuitively. This session will help you approach negotiations with a strategic mindset. You will learn the strategic keys to effective negotiation, including:

Latz's 5 Golden Rules of Negotiation

- Information is Power – So Get It!
- Maximize your Leverage
- Employ "Fair" Objective Criteria
- Design an Offer-Concession Strategy
- Control the Agenda

*And* ways to counter the "negotiation games" some will play.

Martin E. Latz - Latz Negotiation Institute

2:30 p.m. – 3:15 p.m.

### **Networking Break and Exhibits**

3:15 p.m. – 4:30 p.m.

### **BREAKOUT SESSIONS**

#### **Negotiating with Paid Speakers and Agents**

Finding the best fit between your CLE or in house training objective and the solution offered by a paid speaker or agent often involves negotiating much more than fees and dates. Join this session to inventory negotiable territory, typical issues, appropriate techniques and strategies that ensure ongoing mutual benefit. Our diverse panel has "seen almost everything" in 60+ combined years of negotiating with paid speakers and agents and will use their collective CLE, in house, and vendor perspectives to stimulate an interactive exploration of how we all can become more effective in these types of negotiations.

Paul Fogelberg - The Professional Education Group, Inc.

Elaine M. Ohlson - Elaine Ohlson Consulting

Dee Shepherd - The Missouri Bar

#### **Negotiating with Hotels**

See how to achieve the "best" results from two seasoned veterans of the hospitality industry. Learn how to give your meeting "value" to the hotel. What are reasonable requests of the hotel, what is out of the question, and what is really most important to you? Learn how a hotel property evaluates potential business and gain insight into hotel strategies and decision-making processes. You will leave this session with a better understanding of good business for both parties.

Donna J. Passons - Texas Institute of CLE

Gail Seawright - Loews Ventana Canyon Resort

#### **Negotiating in a Political Environment - Thoughtful Negotiation Techniques for Moving Ahead with Your Bar, Your Board, Your Governing Body**

Negotiating with Boards, Bar Associations, and other governing bodies can be the most difficult terrain to traverse. Join Roger Meilton and Pat Nester in utilizing over 50 years of knowledge and experience to identify issues and offer solutions to this frequently delicate task. Do you hold any cards? Have you assessed the value of the information you have and how to use it? How do you control the agenda? Join them for a hands-on experience with a couple of guys who have done it and done it well.

Roger B. Meilton - Pennsylvania Bar Institute

Patrick A. Nester - State Bar of Texas

#### **Negotiating with Volunteers - Be Prepared!**

To get the best outcome from the best people, preparation is key. In this workshop you'll learn how to apply the principles of negotiation to your everyday tasks. What leverage do you have with volunteers? How can you identify and gather key information about your volunteers? How can you best apply your information and leverage to negotiate what you want? Develop your negotiation strategy by identifying your long-term goals and relationships with volunteers! Discover when and how to use concessions strategically. You'll leave this participatory workshop knowing how to dramatically improve your interactions with volunteers through conscious application of these principles.

Susan Blair - Nashville Bar Association

Carole Levitt - Internet for Lawyers

Carole A. Wagan - Suffolk University Law School

#### **30 (or so) Technology Terms, Tips & Tools in 60 Minutes**

If you don't know a "Wi-Fi" from a Hi-Fi or "Pharming" from farming, then this program can help you join the technology conversation. Here's your chance to get up to speed with the latest tech terms, tips and tools and to figure out which are important to you without having to go to one of those technical colleges that advertises on TV in the middle of the night.

Mark Rosch - Internet for Lawyers

4:35 p.m. – 5:30 p.m.

### **ACLEA/ORACLE Joint Working Group on MCLE Uniformity**

6:00 p.m. – 9:00 p.m.

#### **Dinner with Entertainment by Mike Rayburn – "The World's Funniest Guitar Virtuoso"**

Classically Trained, *Comically Derailed*...there's nothing else like it! Mike Rayburn's critically acclaimed presentation is an odyssey of masterful guitar, clean, universally appealing comedy, and musical combinations God never intended. "*A comic genius... enough wit and talent to jumpstart a pacemaker!*" raves the Aspen Daily News. Mike is a regular at **Carnegie Hall**, receiving standing ovations at every performance. He has been featured in USA Today, Newsweek, and Billboard. As part of your conference fee, all ACLEA attendees are invited to join us at the conclusion of the first day of sessions for dinner and drinks prior to the show. Guest tickets are available for \$75.00. Please make your required reservations on your registration form.



7:30 a.m. – 3:00 p.m.

## Registration and Exhibits

8:00 a.m. – 8:45 a.m.

## ACLEA/ORACLE Joint Meeting

A roundtable discussion between regulators and providers of special issues related to applications and the accreditation process.

8:00 a.m. – 8:50 a.m.

## SIG/Committee Meetings

(Exhibitors/Sponsors, International, Public Interest)

9:00 a.m. – 10:00 a.m.

## Plenary Session

### Technology Is Here To Stay — Whether We Like It Or Not!

New technology: Some embrace it. Some ignore it. Some just flat out want no part of it. There's no denying, however, that technology tools have helped to change the way we do everything, from managing our business, to how and what we teach attorneys. By itself, technology is neither good nor evil, but our relationship with it can make all the difference between success and failure. Noted editor and speaker Monica Bay (*Law Technology News*, *Small Firm Business*, *Law Firm Inc.*, *The Common Scold*) will explore how using technology creatively, and embracing its challenges, can help you gain a competitive advantage.

Monica Bay – Law Technology News

10:00 a.m. – 10:30 a.m.

## Networking Break and Exhibits

10:30 a.m. – 11:45 a.m.

## BREAKOUT SESSIONS

### Podcasting

You have probably heard the term Podcasting, maybe even listened to one, or even had someone bring one up in a meeting, but do you really know what a Podcast is? Do you know how it fits into the technology landscape of CLE? This program will discuss what a Podcast is, how an organization would go about creating a Podcast, and what to do with the Podcast once you have one created.

John Ceci - ALI-ABA

### Overcoming E-Mail Overload and Preserving Your E-Sanity

Are you overwhelmed with the volume of e-mail you receive daily? E-mail serves as the primary method of communications in most organizations, agencies, businesses and law firms. It can be a valuable information tool or a productivity-sapping burden, depending on how well it is managed. This program helps you cope with the deluge of e-mail and develop systems for managing your in-box, storing e-mails effectively for future retrieval and coordinating time-sensitive e-mails with your calendar. Productivity consultant and trainer Irwin Karp shares practical techniques to:

- Manage your e-mail and process your in-box for greater productivity
- Organize your e-mail for retrieval
- Deal effectively with attachments
- Use available Outlook tools to move e-mail to action items and your calendar

Irwin Karp - Capital Organizing Solutions

### Excel for Financials and Marketing

Running your business, large or small, for profit or not, requires information. But the information isn't of much use if you can't extract it, analyze it, and where necessary provide it to others in a format they can understand! Join two top presenters who utilize Excel every day to evaluate their financial picture and interpret the data to predicate marketing decisions. Want to impress and inform your boss? Your Board? Help them make great decisions? Get key information on where the data comes from, how to manipulate it, and how to clean it up for your audience. Then you will learn how to investigate financial trends and make budget comparisons to improve your analysis and decision making. And get a bonus 10 tools and tips to help you better utilize your Excel everyday.

John D. Ruppel - Bradford Publishing Company

Lynda Tanner - State Bar of Wisconsin

### Accessible Access! Using Microsoft Access for Marketing in Legal Publishing

Learn how a legal publisher used Microsoft Access to analyze the business records of an acquired company, which enabled it to more quickly identify key customers to communicate with so the customer/publisher relationships could be easily and smoothly transitioned from the acquired company. We'll show you how to:

- Effectively organize and analyze your customer/prospect records!
- Quickly identify the best upselling opportunities from your current customers!
- Focus your new business efforts by easily pinpointing the prospects and/or market areas that are most ripe for growth!
- Merge new prospect and customer contact information into your database almost effortlessly!
- Rapidly generate key customer and prospect mail lists, and then produce marketing letters quickly and easily!

Bill Erskine - Innovative Management Concepts, Inc.

### Identifying and Involving Sponsors and Exhibitors

Considering the participation of sponsors or exhibitors in connection with one of your programs? Explore the challenges you may face and the approaches you can take to attract vendors who'll want to return. This session will address threshold questions you need to consider, practical tips to make your job easier, suggested categories of sponsorships, strategies for nurturing exhibitors and sponsors, benefits you can offer to entice prospective exhibitors, suggested sponsorship levels, recommendations for identifying prospective exhibitors and sponsors, potential pitfalls, and how to provide your sponsors with visibility. Sample forms will also be provided. Bring your curiosity, your questions, and a willingness to share.

John Redenbaugh - Washington State Bar Association

11:50 a.m. – 1:25 p.m.

## SIG Luncheons (ticketed event - open to all registrants)

**Executive Leadership**—Thriving in a “Flat” World — We have been challenged by such authors as Richard Susskind in *The Future of Law* and Thomas Friedman in *The World is Flat*, and our recent plenary speaker in DC, Charles Robinson, to pick up the pace in anticipating the dramatic shifts awaiting the legal profession and the CLE providers that serve it. And, if Bill Gates is right, we need to look beyond a two year window and project out 10 years. Technology-driven globalization, law firm mergers, MDP, MJP, self-help lawyering? Join our lunch discussion to air and debate what we envision as the most significant hurdles and opportunities on the horizon for our CLE leadership. Moderated by Elaine M. Ohlson — Elaine Ohlson Consulting and Mark Sideman — Washington State Bar Association

**Marketing**— *Extreme Shakeover: Brochure Edition* — Customers usually base their purchase decision for a book or seminar on whether they think they'll get something out of it - if there will be some benefit to them. Too often, however, promotional materials focus on the features of a product (e.g. "600 pages of information," "distinguished panel of experts") rather than on the benefits to buyers (e.g. "increase your billing" or "avoid committing malpractice.") Join us for lunch as we discuss ways to identify product benefits and effectively communicate them to customers. *Improve Your Marketing!* Would you like to freshen up the marketing approach for an annual program or frequently updated book? If so, bring your existing brochure for an on-the-spot review, and possible Shakeover. After an example Shakeover, we will break into working groups to review each other's materials - helping highlight benefits and increase sales. Moderated by Roger B. Curlin III — Stetson University College of Law and Mark Rosch — Internet for Lawyers

**Publications**—Replacing Textbooks with Laptops: Wave of the Future in Education? — Join us to hear from Principal Cindy Lee of Empire HS (EHS), located outside of Tucson, about Arizona's first all-laptop, all-wireless public high school. This fall, 350 new students will receive Apple iBooks in lieu of traditional textbooks. EHS is one of the country's first public high schools built from the ground up to accommodate one-to-one computer learning and digital classroom instruction technology. Moderated by Dawn M. McKnight — CLE in Colorado, Inc. and Judith Knight — State Bar of Wisconsin

**Technology**—Join your fellow Tech SIG members for an open-forum discussion on the latest technology trends and issues facing our CLE organizations. We will discuss topics such as technology training for the customer and the CLE provider, the state of online publications, blogging, open source technologies, e-mail list building, how to use the ACLEA listserv to your advantage and a smorgasbord of other topics of interest to you. This group is always on the cusp of the latest developments in technology and has a lot to offer in a format like this! Moderated by Michael Seto — Bar-eX Communications Inc.

1:30 p.m. – 2:45 p.m.

## **BREAKOUT SESSIONS**

### **Intranets – Easier Than You Think!**

An Intranet is a network based on TCP/IP protocols belonging to an organization, usually a corporation, accessible only by the organization's members, employees, or others with authorization. An Intranet's Web sites look and act just like any other Web sites, but the firewall surrounding an Intranet fends off unauthorized access. Like the Internet itself, Intranets are used to share information. Secure Intranets are now the fastest-growing segment of the Internet because they are much less expensive to build and manage than private networks based on proprietary protocols. You will learn if you have the necessary hardware and software required to build an Intranet and how to build one if you do.

Joseph Mendicino - ALI-ABA

### **Creating Word Templates for Course Materials and Forms**

It's time to get "down and dirty" with MS Word! If MS Word is your primary tool for publishing course materials and performing other publishing and office tasks, there are some timesaving tips for routine tasks that will make your work a whole lot easier. This practical, info-packed session trains you in the basics of Word templates and style sheets, with special emphasis on issues unique to preparing course materials. It will also explore ways to use Word's form features and workgroup settings to create greater consistency and efficiency in preparing inter-office and published documents. You'll use what you learn in this session the day you get back to work!

Annette Turcotte - Massachusetts CLE, Inc.

### **Introduction to Adobe Acrobat 7.0 Professional**

The newest version promises that you will "Gain control over projects, simplify processes, and finish work faster!" This session provides an overview of the new features and demonstrates how ACLEA members can best integrate the software into day-to-day operations. If you have specific questions or issues, please send them to [gsh Shepard@iicle.com](mailto:gsh Shepard@iicle.com) prior to the conference.

Ginger Shepard - Illinois Institute for CLE

### **Striking the "Right" Balance: Blending Paper and Electronic Marketing**

In today's world, an effective marketing plan must utilize both traditional paper marketing as well as electronic web based communication. How to resolve the balance of which is most appropriate for your market is one that is dependent on your audience and their preferences, your resources and capabilities and the type of product you are promoting. This discussion will cover how to weigh the pros and cons and develop a direct marketing program that is best for you and how to plan its execution.

Caroline Frankovich - Massachusetts CLE, Inc.

### **Overcoming E-Mail Overload and Preserving Your E-Sanity (Repeat Session)**

See 10:30 a.m. session description.

Irwin Karp - Capital Organizing Solutions

3:00 p.m. – 8:00 p.m.

### **Networking Excursion to the Tohono Chul Park and La Encantada Shopping Center (ticketed event)**

See Special Events Schedule for details. Depart from the Loews Ventana Canyon Resort's Grand Ballroom foyer promptly at 3 p.m. **Cost per person is \$25.00.** Please make your required reservations on your registration form.

## **Tuesday, January 24, 2006**

8:00 a.m. – 4:00 p.m.

### **Registration and Exhibits**

8:30 a.m. – 10:00 a.m.

### **ACLEA Business Meeting and Breakfast**

10:00 a.m. – 10:30 a.m.

### **Networking Break and Exhibits**

10:30 a.m. – 11:45 a.m.

## **BREAKOUT SESSIONS**

### **Staff Transitions: Training and Retaining the Staff You Need**

We've all been there. Just as your top assistant has finally mastered his job, he leaves to go to law school. Or just after your most valuable colleague is promoted, she leaves for "greener pastures." What can we do to increase staff retention? And what can we do to ease the transition once the new employee is hired? What are the best ways to train new staff? This session provides practical tips on training videos, training manuals, handbooks and other vehicles to expedite the efficient training of new employees. There are also personal issues associated with change management: fear, resistance, and temporary loss of productivity. This workshop offers strategies to manage the people side of change.

Karen Brown - Institute of Continuing Legal Education

Jonathan Small - Massachusetts CLE, Inc.

### **Spin Doctors: Materials on Disk**

Is your organization ready to distribute course materials on a CD-ROM? We'll share a detailed cost-analysis of printing course books in-house vs. CD-ROM production in-house. What do customers want? We'll share how we meet our customers' needs and save money too!

Holly Garland Langworthy - Minnesota CLE  
Samantha S. Ward - The Missouri Bar

### **How to Write Titles and Copy That Will Increase Your Course Attendance (or Book Sales) - Guaranteed!**

A fast-paced and fun look at how the words you choose in headlines (and throughout your copy) can dramatically affect your course registration... and, surprisingly, even affect program quality. Don't miss this opportunity to learn the principles that you can use to improve the results of your advertising efforts.

Jeffrey H.A. Johnson - Minnesota CLE

### **"The Yellow Brick Road" – Using Integrated, One-2-One Messaging to Increase Attendance, Revenues and Profits**

Upset with e-mail? Befuddled by fax? Discouraged by data? Learn how integrated media messaging can reduce your marketing costs and increase attendance and repeat sales. In this session, you'll learn key secrets and hear real-life CLE examples of successful One-2-One messaging:

- How to build/maintain lists that deliver
- How to create messages with impact
- How to integrate multiple media options into your promotional mix
- How to make appropriate media decisions
- How to utilize media preference and permission
- How to track and improve results over time

Effective marketing communication is key to driving attendance and growth. You'll walk away from this session with proven tips on how to streamline your communications, virtually eliminate marketing failures and increase your revenues substantially over time.

R. Michael McKinney – comHAUS, Inc.  
Gary L. Wilbert – Virginia CLE

11:50 a.m. – 1:25 p.m.

### **SIG Lunches (ticketed event - Closed Luncheons - you must be a member of the SIG to attend)**

**In-House**— Get to know new colleagues or catch up with old friends over lunch and an informal discussion on how to best support your attorney's climb to success. In-house SIG members are invited to participate in this open forum opportunity and to bring your questions, ideas and practical tips about programs, tools and resources available to support and nurture your attorneys in their training and development needs. Moderated by Madeleine Kershek — Fried, Frank, Harris, Shriver & Jacobson LLP and Jane S. Rhee — Shearman & Sterling LLP

**Law Schools**—"Sponsorships in the Law School Environment" — Join us for a discussion on the particularities of sponsorships and co-sponsorships in the law school environment, along with other creative ways of increasing your net income. Moderated by Carmen P. Lopez — Inter American University of Puerto Rico

**Local & Specialty Bars**— Join us for a roundtable discussion on topics such as competition, advertising, daily obstacles, and potential presenters/topics. Moderated by Katherine Marino — Hartford County Bar Association, Inc.

**Nationals**— Consumer data protection...responses to natural disasters...high cost of travel...rising postal rates... Does your life as a national CLE provider sometimes seem like one darn thing after another? Come to our lunch, where we'll discuss these and many other challenges facing the national CLE organization. Moderated by Mark T. Carroll — ALI-ABA and Matt Mickelson — National Business Institute

**State & Provincial Bars**— We will once again engage in our favorite activity of sharing ideas that have worked well and not so well over the past half year. A not-to-be missed event that traditionally provides lively conversation, networking, and insights from colleagues. Moderated by Rob Koonce — State Bar of New Mexico and Fran Wellington — Ohio State Bar Association

**The UnSIG'ed SIG**—Not in an Organizational SIG? This luncheon will serve as a forum for ACLEA members who do not meet the criteria for the existing Organizational SIGs. We will discuss the creation of a new SIG for the currently "unSIGed", including the name and criteria for membership. The recommendations will be presented to the Executive Committee for their consideration. We will also have some time for roundtable discussions on topics of interest suggested by the attendees. Moderated by Roy S. Ginsburg — Roy S. Ginsburg, J.D.

1:30 p.m. – 2:30 p.m.

### **Plenary Session**

#### **Strategies and Techniques to Get People to Register Now**

Potential customers/delegates are waiting later and later to register/book for your programs. Leave this session with practical strategies, tactics, and tips on ways to get people to Register Now! Learn how to create a sense of urgency in your offer. . . how to use premiums, early bird discounts, marketing after the sale, guarantees, team attendance, scholarships, delayed billing, your cancellation policy, payment options, booking choices. . . and many more ways to get immediate registrations and payments from your prospects! And book publishers take note: many of these same strategies and techniques will work for you!

Ralph Elliott - Clemson University

2:45 p.m. – 4:00 p.m.

### **BREAKOUT SESSIONS**

#### **How to Use an Integrated Marketing Mix to Increase Your Seminar/Conference Attendance**

Direct mail, e-mail, telemarketing, space ads, search engine optimization and search engine marketing are all tools you can use to reach your attendance goals. In this session, learn how to integrate these various marketing media into your seminar and conference promotions. Leave with both "macro" and "micro" ideas to put these tools to maximum use in your next promotional campaign! Learn how to:

- Increase the response rates on your direct mail
- Increase the click-through rates on your e-mail
- Increase the conversion rates on your telephone marketing
- Increase the number of inquiries from your space ads
- Lift the "organic" ranking of your web site with Google
- Drive traffic to your web site using paid per click

Leave this session knowing how to lift your response rates and marketing productivity by capitalizing on the seminar/conference promotional tools that drive your success.

Ralph Elliott - Clemson University

#### **Branding: Beyond the Logo**

What do your customers think about when they hear your name or see your logo? Wouldn't it be great if they immediately thought, "They're the gold standard of CLE products"? There's more to creating a successful Brand strategy than an artistic logo and a pithy tag line. Learn how to build your Brand to create positive expectations among your customers about the quality of your seminars and products. See how one CLE provider has taken its existing tag line and is transforming all of its communications from seminar brochures and materials to e-mail messages and customer service greetings to create a cohesive presentation of the image it wants to project.

Mark Rosch – Internet For Lawyers  
Nicole Steckman – Georgetown University Law Center

# General Information

## Marketing for Non-Marketers

Books to sell? Seminars to promote? Did they teach us this in law school? This program will provide some simple tools you can use to develop a promotional message for your products. How to get started? Develop a path – backwards! Remember what you’re selling – and to whom. Distilled from experience and stolen from the best, these tools will always provide a starting point; a way of thinking about your product that will connect you to your customers.

Thomas E. Dixon, Jr. - State Bar of Wisconsin

## Market Research: Understanding Lawyer Needs

Learn effective methods of gathering data on the types of legal information lawyers need, how they use it, and what gets them to buy it from one provider versus another. These methods include designing, distributing, and interpreting product-development surveys; forming, using, and nurturing editorial and program advisory boards; working with outside market research firms; being sociable with your constituency at bar functions; reading the bar journal and section newsletters; manning your own exhibit table at CLE conferences; and using program evaluations and product comment cards, all with the intent to effectively solicit feedback on how well you’re meeting the needs of lawyers in your jurisdiction.

Caroline Frankovich - Massachusetts CLE, Inc.

Gregory J. Smith - Bradford Publishing Company

Carolyn L. Wepfer – Pennsylvania Bar Institute

## Using the Website as a Marketing Tool - Selling and Marketing Off and Around the Website

In an “on-demand” world, your organization’s website can be the focal point for all your CLE efforts, showcasing your schedule, taking registrations, selling books, and providing other features only available online. In other words, it is a perfect vehicle for cross-marketing. Just as your site can quickly connect a customer with all manner of CLE options, your other CLE efforts — course brochures, letters, ads in other publications, e-mails, customer service — should consistently direct customers to your site to learn more about a publication, to download a course brochure, to view a streaming video, to purchase a PDF of course materials, or to get the latest case summaries. Your site can be the connection to all that you do — let your customers know it!

David Kroll - State Bar of Texas

Amy Danziger Shapiro - ALI-ABA

6:30 p.m. – 9:30 p.m.

## ACLEA Closing Event

See Special Events Schedule for details. Tickets for registrants are included in the registration fee. Cost per guest is \$50.00. Please make your reservation in advance on your registration form and be sure to include the number of guests attending.

### Questions?

Call or e-mail ACLEA headquarters at  
(512) 453-4340 or [aclea@aclea.org](mailto:aclea@aclea.org)

### Register By:



**Mail: P.O. Box 4646  
Austin, TX 78765**



**Fax: (512) 451-2911**



**Online Registration  
<http://www.aclea.org>**

## Registration

The program registration fee includes conference materials, admission to Sunday, Monday, and Tuesday sessions, the business meeting and breakfast, and the Sunday and Tuesday night special events. Optional Saturday educational sessions, lunches and tours are separately priced. We must receive payment for optional sessions, lunches, and tours in advance of the conference to guarantee your reservation. All special event and tour fee payments are nonrefundable after January 6, 2006.

**Spouse/Guest Fee** — ACLEA has instituted a spouse/guest fee for attendance at ACLEA meetings by those not eligible for ACLEA membership. This is a restricted fee intended for family members. Any spouse/guest who is interested in networking with other spouse/guests as well as friends in ACLEA, may pay a fee to cover the costs of food and beverage and attendance at some meetings. This \$95 fee includes the welcome reception, continental breakfasts, business meeting breakfast, exhibit hall mixer, morning and afternoon breaks, and attendance at any sessions on topics that may be of interest. This benefit is extended only to those spouse/guests who are not eligible for ACLEA membership. **ANYONE CONSULTING WITH OR EMPLOYED BY AN ORGANIZATION ELIGIBLE FOR MEMBERSHIP IN ACLEA IS NOT ELIGIBLE FOR THIS FEE.**

## Hotel Information

Our host hotel is the Loews Ventana Canyon Resort. ACLEA has secured a special room rate of \$175.00, double or single, until **December 30, 2005**. To make your reservations, call (800) 234-5117 or (520) 299-2020 and request the Association for Continuing Legal Education group rate. **Please note: ACLEA has obtained this room rate by contracting a total meeting package at the Loews Ventana Canyon Resort. ACLEA must meet certain minimum food & beverage and hotel room pickup requirements or ACLEA will face attrition and/or meeting room rental. In order for ACLEA to continue to provide a reasonable registration fee, we need your help. Please take advantage of the room rate we have negotiated and make your reservation by contacting:**

**Loews Ventana Canyon Resort**

**7000 North Resort Drive**

**Tucson, Arizona 85750**

**Phone (520) 299-2020 / Toll Free (800) 234-5117**

**Fax (520) 299-4151**

## Transportation

The Loews Ventana Canyon Resort is approximately 21 miles (30 minutes) from the Tucson International Airport (TUS). Shuttle service is available from the AZ Stagecoach, for \$41 for one person one-way or \$72 round-trip, if purchased together at the shuttle check-in counter. Additional people traveling to the same destination are \$6 each one-way, or \$12 each round-trip, if purchased with one payment (no split checks) at the time of shuttle check-in. Taxis will also be available with approximate fares of \$45-\$50 one-way. Foothills Sedan (520/294-2483) will send a town car for approximately \$55 one-way.

## Cancellation Policy

All special event & tour fee payments are nonrefundable after January 6, 2006. Registration refunds, less a \$50 processing fee, will be given to registrants who cancel by Friday, January 6, 2006. If notice is received between January 7 and 13, 2006 at 5:00 p.m., refunds will be given less a \$150 processing fee. No refunds or transfers will be granted thereafter.

# 42nd Mid-Year Meeting

January 21 - 24, 2006  
Loews Ventana Canyon Resort  
Tucson, Arizona



## Tucson

Come for a magnificent change of scenery. Tucson is the authentic Southwestern destination. Mile after mile of pristine desert, cactus like nowhere else on Earth, spectacular mountains in every direction. Tucson is a growing metropolis of 900,000 that keeps getting better and better. National and State Parks and Forests ring the city. It lies in the borderland, a region that blends the cultures of the United States and Mexico, and has a long history of settlement by ancient Native American peoples, Spanish explorers, and Anglo frontiersmen.

“Tucson” is derived from the Tohono O’odham Native American word Stjukshon (pron. Chuk-son) for “spring at the foot of black mountain.” Spanish and European settlers changed the name to a more easily pronounceable Tucson. The “black mountain” is just southwest of downtown. It is known as “A” Mountain, named for its white rock “A,” painted by University of Arizona students annually since 1915. The “spring” was the Santa Cruz River. What remains is a sweeping sand “wash” where water still flows beneath the sand and rocks of the riverbed.

The weather is mild nearly all the time, just right for all kinds of fun activities. It has more sunshine than most cities in the world, over 300 days each year. Temperatures in the winter average highs of 70 degrees. Join us in January and experience Tucson for yourself!

Leadership, Education, Development



The Network for CLE Professionals...Worldwide