



MARKETING AND MANAGEMENT SEMINAR

February 14, 2025

Fontainebleau Miami Beach Hotel | Miami Beach, FL

Participant Agenda

FRIDAY, FEBRUARY 14, 2025

- 7:00 – 8:00 a.m. **REGISTRATION AND WELCOME NETWORKING BREAKFAST**
Continental Breakfast Provided
- 8:00 – 8:15 a.m. **WELCOME ANNOUNCEMENTS**
- 8:15 – 9:00 a.m. **FIRST 5 MARKETING IDEAS TO IMPLEMENT & HOW**
Gwen-Marie Davis
GDH Law
Lanham, MD
- 9:00 – 9:45 a.m. **WHAT'S THE POINT OF YOUR FIRM?**
 - Mission statement as brand marketing
Cheryl Pope
Carlton Human Capital, LLC
Dallas, TX
- 9:45 – 10:30 a.m. **BUILT TO LAST: ELIMINATING SINGLE POINTS OF FAILURE IN LAW FIRM OPERATIONS**
COO Panelists
- 10:30 – 10:45 a.m. **SPONSOR PRESENTATION**
(Not for CLE credit)
- 10:45 – 11:00 a.m. **MORNING BREAK**
- 11:00 – 11:45 a.m. **DOES YOUR MARKETING BUDGET MAKE YOU MONEY?**
 - Tracking marketing efforts & ROI
Gyi Tsakalakis Conrad Saam
Attorney Sync *Mockingbird Marketing*
Chicago, IL *Seattle, WA*





11:45 a.m. – 12:15 p.m. **MORNING ROUNDTABLE (SYNCHORNIZED MARKETING)**
(All morning speakers)

12:15 – 1:30 p.m. **LUNCH BREAK**
(Lunch on your own)

1:30 – 2:15 p.m. **CASE MANAGEMENT SYSTEM AS FIRM MANAGEMENT SYSTEM**
Jay Stefani
Levinson & Stefani
Chicago, IL

2:15 – 3:00 p.m. **OUTSOURCING TASKS FOR EFFICIENCY AND PRODUCTIVITY – THE HOW AND THE WHY**

- Using technology for medical records
- Intake
- Artificial Intelligence
- Automation
- Metrics

Michael McCready
McCready Law
Chicago, IL

3:00 – 3:45 p.m. **OUTSOURCING STAFFING – WHEN TO DO IT AND WHAT YOU NEED TO KNOW**

- Outsourcing enabled by technology

Laura Yaeger
Yaeger Law, PLLC
St. Petersburg, FL

3:45 – 4:30 p.m. **AFTERNOON ROUNDTABLE (IMPORTANCE OF INTEGRATION)**
(All afternoon speakers)

4:30 p.m. **ADJOURN**

