

The Canadian Institute Presents:

Legal Knowledge Management Forum

April 15 – 16, 2015 | One King West, Toronto

Chairs:

Joshua Fireman
President, Fireman and Co.

Joel Alleyne
President, Alleyne Inc.

Interact with Experts in Leading Organizations:

Bennett Jones SLP

Blake, Cassels & Graydon LLP

Borden Ladner Gervais LLP

Cassels Brock & Blackwell LLP

Dentons Canada LLP

Field Law

Fireman and Co.

Gimbal Canada Inc.

Goodmans LLP

Hicks Morley Hamilton Stewart Storie LLP

Knowledge Management Institute
of Canada

KPMG International

Osler, Hoskin & Harcourt LLP

Enhance Your KM Program to Improve Client Relationships

Learn from industry leading innovators about the importance of implementing a KM system for your firm, business or organization.

- Discover how to create continuous **process improvement** and add value for clients
- Understand the importance of KM for **small and mid-size** legal departments
- Learn to **capture and transfer critical knowledge** from retiring experts
- Leverage the KM professional as an **in-house consultant**
- Explore how to **integrate project management** into your current KM functions
- Create a **culture of trust** and collaboration to facilitate knowledge sharing

Develop your skills by attending the Post-Program Working Group:
Process Mapping Workshop – Creating a Better Process

Marketing
Partner:



This program contains
3.0 Professionalism Hours.



REGISTER NOW | 1-877-927-7936

www.CanadianInstitute.com/KnowledgeManagement



Join us at The Canadian Institute's inaugural Legal Knowledge Management Forum as we deconstruct and reconstruct the new KM



Traditionally, KM lawyers have been the resident search engine and database specialists within their organizations. Knowledge Management is entering a new era; having evolved past precedent and record keeping. Now the KM lawyer focuses on: **Efficient Use of Technology, Practice and Process Management, Knowledge Sharing, Intranets and Portals, Training and CLE, Legal Project Management, Change Management** and more.

The aim of KM has always been to improve the delivery of legal services to clients; however, KM should also be applied to the business of law. Stay current in this dynamic field with practical and business minded strategies to:

- Assess the ways KM has changed over the past two decades and where it's headed next
- Discover how to use metrics and benchmarks to align yourself with the revenue stream
- Extract the tacit knowledge from your internal experts
- Create effective social enterprise tools within your organization to encourage knowledge sharing
- Use sequential process mapping to meet process improvement initiatives
- Embrace reusable work product and avoid reinventing the wheel each time

Enhance your learning experience by attending the post-program strategy session:

Process Mapping Workshop – Creating a Better Process

Register today by calling The Canadian Institute at 1-877-927-7936, faxing your registration to 1-877-927-1563 or registering online at www.CanadianInstitute.com/KnowledgeManagement.

We look forward to welcoming you in April!

LEGAL ACCREDITATION

This organization has been approved as an Accredited Provider of Professionalism Content by the **Law Society of Upper Canada**. This program contains 3.0 Professionalism Hours. This program is eligible for up to 6.5 Substantive Hours.

This program has been approved by the **Law Society of Saskatchewan** for 8.0 CPD hours for the conference. Members will also receive 3.0 additional CPD credit hours for the attendance at the workshop.

The same number of hours may be applied toward your continuing legal education requirements in **British Columbia**.

The **Barreau du Quebec** automatically recognizes the same number of hours for this training activity, the latter having been accredited by another Law Society subject to MCLE.

Attendance at this program by members of the **Law Society of Alberta** may be submitted to the Law Society for Continuing Professional Development credits.

SPONSORSHIP & EXHIBITION OPPORTUNITIES

Maximize your organization's visibility in front of key decision-makers in your target market. For more information, contact **Toshiba Billings**, Director of Sponsorship Relations, Legal and Finance, at 416-927-0718 ext. 7246, toll-free 1-877-927-0718 ext. 7246 or by email at T.Billings@CanadianInstitute.com



To receive exclusive discounts, program updates and offers, join our email list at www.canadianinstitute.com/emaillist

MARKETING PARTNER:



Since its inception, **KMIC** has trained and certified more knowledge management professional than any organization in Canada. The Institute was launched to help set the standards for the Knowledge Management Profession in Canada and to work with organizations around the globe to develop their knowledge strategy.

KMIC clients and members include Financial Institutions, Provincial and Federal Government Organizations, Energy, Oil and Gas Companies, Not for Profits and NGOs.

2015/16 will see the launch of the *Canadian Centre for Knowledge Management*, a not for profit entity, designed to accelerate the development and transfer of Canadian know how and innovation around the globe.



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The Canadian Legal Network



7:30 **Registration Opens and Refreshments are Served** 🍷

8:30 **Opening Remarks from Co-Chairs**

Joshua Fireman
President, Fireman and Co.

Joel Alleyne
President, Alleyne Inc.



9:00 **Where is Legal KM Today?**

Ginevra Saylor
National Director, Knowledge Management
Dentons Canada LLP

- How has KM changed over the past two decades?
 - What were its origins?
 - What has evolved?
 - Where are we now?
- Where is KM headed?
 - What are the new hot topics
 - How have clients changed law firms' focus?
 - How can KM keep law firms relevant?
- What fundamental truths remain?
 - What has KM always needed?
 - What makes good KM?
 - What helps KM succeed?

9:30 **The Legal KM Professional: Competencies, Credentials and Classifications**

Heather Ritchie
Chief Knowledge Officer
Hicks Morley Hamilton Stewart Storie LLP

Simon Wormwell
Counsel, Practice Support
Blake, Cassels & Graydon LLP

- What types of roles are available within KM?
- What skills and background are required for those roles?
- Where does KM fit within the organization?
- Who does KM report to?
- What are different KM models and structures?

With the evolution of legal KM, what is the job description of a Legal KM professional today and what skills do you need to succeed in the future?

10:00 **Networking Refreshment Break** 🍷

10:15 **Knowledge Management for Competitive Advantage**

Praveen Andivasu
Head of Knowledge Management,
Global Marketing, KPMG International

- Aligning KM strategy with changing business models and customer requirements
- Identifying strategic knowledge assets in the organization
- Case Study: Developing and implementing KM solutions to support growth and competitive advantage
- Leading the change management program for delivering the value proposition of KM to the business



11:00 **The Evolution of the KM Professional as an In-house Consultant – Who Ya Gonna Call? – KM!**

Eugene A. G. Cipparone
Director, Professional Support , Goodmans LLP

- Traditionally, KM lawyers have been the in-house practice area consultants – Model Precedents, Document Management, Search Engines and Databases, Efficient Use of Technology, Practice and Process Management, Intranets and Portals, Training and CLE, Legal Project Management
- The focus of KM has always been on the delivery of legal services to clients, but KM should be applied to the business of law, not just the practice of law
- KM should also be the in-house consultant for Risk Management, File Intake, Records Management, Closing and Corporate Minute Books, Finance, Marketing and of course Technology

12:00 **Networking Luncheon for Delegates and Speakers** 👥

1:30 **Using Legal Project Management to Increase Efficiencies**

- Organizing the information around a particular project
- How do you integrate PM into current KM functions
- Dealing with the Productivity Paradox
- Why you are destined to be ineffective and inefficient if you haven't optimized processes first

2:30 **Deploying KM Initiatives in Small and Mid-size Legal Organizations**

Shaunna Mireau

Director of Knowledge Management and Process Improvement, Field Law

- Where does a first formal KM initiative begin
- What is a path from project idea to deliverable
- How do you build and sustain buy in for KM in a mid-size firm

3:10 **Networking Refreshment Break**

3:30 **KM and Insulating your Organization from the Aging Demographic Problem**

Norman Letalik

Partner and Managing Director, Professional Excellence, Borden Ladner Gervais LLP

Blake Melnick

Chief Knowledge Officer
Knowledge Management Institute of Canada

- Generational issues / retirement tsunami –succession planning for next firm leaders
- Knowledge transfer from older to younger generations: Coaching; Mentoring; Client Teams; Archiving
 - The importance of tacit knowledge
 - How do you capture the “rich knowledge” in people’s heads?
 - How to capture industry knowledge
 - How to capture client knowledge, or why CRM is never easy
- How to assess who the expert is:
 - Self identification
 - Rewarding experts and inhibiting dabblers
 - Embedded knowledge



**MODULE 3:
THE PRACTICAL KM
PROFESSIONAL**

4:00 **Using Metrics and Benchmarks to Align Yourself with the Revenue Stream**

Meredith Williams

Chief Knowledge Management Officer
Baker, Donelson, Bearman, Caldwell & Berkowitz, PC

As clients demand more for less, legal service providers must follow suit. This session will discuss the current gaps between the KM lawyer and the revenue stream. It will address developments in using metrics to show your value within the organization. Topics will include:

- How to create benchmarks around your work
- Working with the financials and billing models to capture KM initiatives

5:00 **Day 1 Closing Remarks from Co-Chairs Conference Adjourns**



8:15 **Refreshments are Served**

8:45 **Opening Remarks from Co-Chairs**

9:00 **Enterprise Search for Legal Departments of All Sizes**

John Gillies

Director of Practice Support
Cassels Brock & Blackwell LLP

Kate Simpson

National Director of Knowledge Management
Bennett Jones SLP

- Security: working with IT to avoid getting hacked
- Databases: expertise search database – being able to find what you want, when you want it
- Reusable work product: finding what people have already done and not reinventing the wheel each time
- Small companies should start capturing the knowledge when they’re small

10:20 **Networking Refreshment Break**



**MODULE 4:
THE DELIVERABLE –
YOUR LEGAL KM
REFERENCE MODEL**

10:40 **Boosting Trust and Collaboration in your Organization**

Connie Crosby

Principal, Crosby Group Consulting

- Physical work space – The Google model
- The way firms are structured is the exact opposite of collaboration
- How do we get lawyers to trust us?
- Movement away from the individual and more to knowledge networks and community
- Social tools: Using social media for law firms i.e. Facebook or Twitter for the firm
- Culture must be one of valuing KM
 - How to change the KM culture in your firm – can take 3-5 years
 - What legal can learn from the consulting agencies

11:20 **Process Improvement Panel**

Mara Nickerson

Chief Knowledge Officer
Osler, Hoskin & Harcourt LLP

Shaunna Mireau

Director of Knowledge Management and Process Improvement, Field Law

Karen Dunn Skinner

Co-founder and Principal, Gimbal Canada Inc.

David Skinner

Co-founder and Principal, Gimbal Canada Inc.

- How adding a process improvement element to your KM strategy can enhance knowledge transfer and risk management
- Process improvement and innovation – what does having a process-based approach say to your clients
- How process improvement works with your existing KM software/technology
- How process improvement approaches can improve user participation and buy-in
- Finally, with input from the floor, this panel will explore how participants are using process improvement within their firms

12:30 **Closing Remarks & Conference Concludes**

** A light lunch will be provided for those registered for the afternoon workshop.*

POST-PROGRAM WORKSHOP:
1:30 – 4:30pm
(Registration opens at 1:00pm)

Process Mapping Workshop – Creating a Better Process

Karen Dunn Skinner

Co-founder and Principal, Gimbal Canada Inc.

David Skinner

Co-founder and Principal, Gimbal Canada Inc

A picture is worth a thousand words. A map is worth even more.

With a map, you get a clear picture of how work flows through a practice group or department. You can see the silos and trouble spots, locate sources of error, and identify opportunities to improve performance. You can capture the knowledge of those around you in a tangible way.

Join us for this hands-on workshop and learn the basics of value stream and process mapping.

- What do you need a map for?
- What kinds of maps can you use?
- How do you start?
- What else can you do with your map?

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PROGRAM CODE: 285L15-TOR

CALL, EMAIL, VISIT OUR WEBSITE, OR REGISTER BY MAILING/FAXING FORM BELOW:

1 YES! Register the following delegate for the **Legal Knowledge Management Forum**

FEE PER DELEGATE	Register & Pay by March 6, 2015	Register & Pay after March 6, 2015
PLEASE ADD 13% HST TO ALL ORDERS		
<input type="checkbox"/> Program (on site)	-\$1895 \$1695	-\$2095 \$1895
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<input type="checkbox"/> Please add a copy of the *Program Proceedings <input type="checkbox"/> BINDER or <input type="checkbox"/> CD-ROM to my order for \$295 + \$22.95 (S+H) + applicable taxes		
<small>*Program Proceedings are published and shipped 4 weeks from the program</small>		
<input type="checkbox"/> I cannot attend but would like information on purchasing a copy of the Program Proceedings		

**ELITEPASS is recommended for maximum learning and networking value.*

2 CONTACT DETAILS

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I have enclosed my cheque for \$ _____ including applicable taxes made payable to **The Canadian Institute** (GST No. 84221 1153 RT0001)

Wire Transfer (\$CAD)

Please quote the name of the attendee(s) and the program code 285L15 as a reference.
Beneficiary: **The Canadian Institute**
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ADMINISTRATIVE DETAILS

VENUE: One King West
ADDRESS: 1 King Street West, Toronto, ON M5H 1A1
TEL.: (416) 548-8100

Hotel Reservations

For information on hotel room availability and reservations, please contact (416) 548-8100 and ask for the best available rate.

Registration Fee

The fee includes the program, all program materials, coffee breaks and lunches.

Payment Policy

Payment must be received in full by the program date to ensure admittance. All discounts will be applied to the Program Only fee (excluding add-ons), cannot be combined with any other offer, and must be paid in full at time of order. **Group discounts available to 4 or more individuals employed by the same organization, who register at the same time.** For more information on group rates, please call 1-877-927-7936.

Cancellation and Refund Policy

You must notify us by email at least 48 hrs in advance if you wish to send a substitute participant. Delegates may not "share" a pass between multiple attendees without prior authorization. If you are unable to find a substitute, please notify **The Canadian Institute** in writing no later than 10 days prior to the program date and a credit voucher will be issued to you for the full amount paid. Credit Vouchers are valid for 1 year and are redeemable against any other program by **The Canadian Institute**. If you prefer, you may request a refund of fees paid less a 25% service charge. No credits or refunds will be given for cancellations received after 10 days prior to the program date. **The Canadian Institute** reserves the right to cancel any program it deems necessary and will, in such event, make a full refund of any registration fee, but will not be responsible for airfare, hotel or other costs incurred by registrants. No liability is assumed by **The Canadian Institute** for changes in program date, content, speakers or venue.



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To expedite your registration, please mention your Priority Service Code

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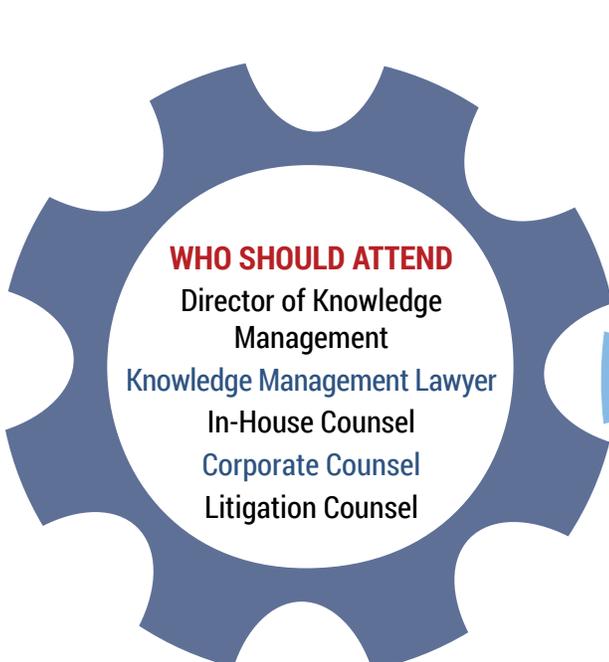


Blake Melnick & The Knowledge Management Institute of Canada invite you to **save \$200* off of the cost of registration.**

Please mention this special offer and your priority service code **285DX02** when you register.

*See pricing chart for details. Special pricing applies to regular conference fee at the time of registration and is not valid in combination with any other offer.

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<i>ELITEPASS*</i> : Program + Workshop	-\$2590 \$2390	-\$2790 \$2590



WHO SHOULD ATTEND

Director of Knowledge Management
Knowledge Management Lawyer
In-House Counsel
Corporate Counsel
Litigation Counsel



TOP 5 REASONS TO ATTEND

- Process improvement: best practices
- Using legal project management in your KM role
- Assessing the KM function in today's legal climate
- Unparalleled networking opportunity
- Practical legal and business guidance