

SmartAdvocate® Connect

BootCamp: Wednesday, October 25th Agenda

- 8:00 AM BREAKFAST
- 9:05 AM Boot Camp Kick-off | Claude Simpson
- 9:15 AM Managing Intake: The Call Is Coming From Inside The House | Trei Clark
- 9:45 AM Feature Spotlight: Client Fillable Questionnaire & External Document Share | Claude Simpson
- 10:15 AM Better Medical Records Management | Marina Delfel
- 10:30 AM Feature Spotlight: Medical Tabs | Marina Delfel
- 10:45 AM MORNING BREAK
- 11:00 AM WorkPlans: How To Onboard Without Going Overboard | Susan Pratt
- 11:30 AM Feature Spotlight: SmartAdvocate Self Help Tools | Hemily Fuentes
- 12:00 PM LUNCH
- 12:45 PM Communication Automation: Don't Call Us, We'll Call You | Trei Clark
- 1:20 PM Feature Spotlight: eSign And Client Intake Automation With OnTask | Robert Alvarez, OnTask
- 1:30 PM Reports: Run Your Reports...Don't Let Them Run You | Susan Pratt
- 2:00 PM Feature Spotlight: Custom Dashboard Panels for My SmartAdvocate | Marina Delfel
- 2:45 PM Mastering The Dashboard Designer | Claude Simpson
- 6:00 PM WELCOME RECEPTION

Thursday, October 26th Agenda

- 8:00 AM BREAKFAST | *EXHIBIT HALL*
- 9:00 AM TechTalk - What's New & What's Coming | Igor Selizhuk
- 9:30 AM The Key To Client Satisfaction: Dashboards, Portals, and Automation | Claude Simpson
- 10:00 AM Feature Spotlight: Client Portal | Trei Clark
- 10:15 AM MORNING BREAK | *EXHIBIT HALL*
- 10:45 AM Managing Your Mass Tort Cases In SmartAdvocate | Melanie Muhlstock, Parker Waichman
- 11:15 AM What's New In Mass Torts [PANEL] | Christina Gibbons, Simmons Hanley Conroy, Jennifer El-Kadi, Babin Law; Melanie Muhlstock, Parker Waichman | Moderator: X Social Media
- 12:00 PM Feature Spotlight: Partner Law Firm Portal | Claude Simpson
- 12:15 PM Lunch Sponsor | Records On Time | Charles Ruderman, Records On Time
- 12:20 PM LUNCH | *EXHIBIT HALL*
- 1:15 PM Building An Intake Process That Allows You To Scale (And Sleep At Night) | Gary Falkowitz, Intake Conversion Experts
- 2:00 PM Feature Spotlight: Case Wizard | Marina Delfel
- 2:15 PM Keeping An Eye On The Pulse With Reporting & Dashboards | Claude Simpson
- 2:45 PM AFTERNOON BREAK | *EXHIBIT HALL*
- 3:15 PM Critical Case Management For A More Profitable Result | Micki Love, cj Advertising
- 4:00 PM Welcome Reception Sponsor | Case Status | Greg Taylor, Case Status
- 4:15 PM Evening Notes
- 6:00 PM EVENT NIGHT AT EPCOT

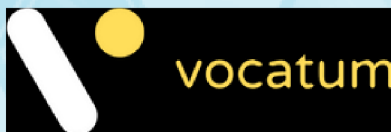
Questions? Text or call Tricia Drew at (516) 458-6782

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Friday, October 27th Agenda

- 8:00 AM BREAKFAST | *Exhibit Hall*
- 9:05 AM How Will New AI Technologies Shape The Future Of Law? | Raymond Mieszaniec, EvenUp
- 9:45 AM The Future of AI in the Legal Industry [PANEL] | Raymond Mieszaniec, EvenUp | Ryan Shin, SettLiT
Gregory C. Belmont, CereBel Intelligence | Igor Selizhuk, SmartAdvocate
- 10:30 AM MORNING BREAK | *Exhibit Hall*
- 11:00 AM Feature Spotlight: Litigation Screens | Nataliya Blidy
- 11:15 AM Integrating Your Marketing & Your Software To Maximize Efficiencies | Nalini Prasad, BluShark Digital
- 11:45 AM Feature Spotlight: Advertisement Campaigns | Marina Delfel
- 12:00 PM Lunch Sponsor - National Record Retrieval | Tim Lima, National Record Retrieval
- 12:05 PM LUNCH | *Exhibit Hall*
- 1:00 PM SmartAdvocate Best Practices [PANEL] | Brandon Bass, The Law Offices Of John Day,
John H. Fisher, NY Injury & Malpractice Law Firm, Christine Palmer, Rutter Mills
- 1:45 PM Q&A + Suggestions for SmartAdvocate | Igor Selizhuk, Claude Simpson & Jose Vallines
- 2:15 PM Wrap Up

Exhibit Sponsors



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