

**ILTA Small Firm Summit  
February 23, 2021**

**9:00 AM Central Time  
Virtual Breakfast/Welcome**

**9:30 – 10:15 AM**

**Cloud First Philosophy: What you Need to Understand and How to Evaluate Different Cloud Providers**

Moving to the cloud can be a daunting endeavor – what are your goals, and what do you need to understand to evaluate different cloud providers? In this session we will discuss the best practices for moving document management systems, financial systems, Microsoft Exchange, and email to the cloud. Attendees will come away with a checklist on how to evaluate different cloud providers.

**Speaker:** Jarem Shook, NetDocuments

**10:15 – 10:30**

**An interview with our sponsor - NetDocuments**

**10:30 – 11:45 AM**

**Managed Service Provider (MSP) Strategies: How to Find and Vet MSPs When You Can't Do It All Yourself**

As a small firm IT professional, you cannot do it all yourself and finding and vetting managed service providers can be a daunting endeavor. In this session we will help attendees develop a strategy to understand and evaluate different providers. We will discuss and provide advice on building sustainable support structure for document management systems, financial systems, help desk, training, security, and others.

**Speaker:** Jude Travers-Frazier, COO, Kraft Kennedy

**11:45 -12:00 PM**

**Wrap Up**

**ILTA Small Firm Summit  
February 24, 2021**

**9:00 AM Central Time  
Virtual Breakfast/Welcome  
A word from LS-ISAO**

**9:30 – 10:15 AM**

**Small Firm Security on a Shoestring Budget**

In this session, we will discuss ways to prioritize security on a shoestring budget, as well as help attendees work with their firm's management to convince them why they should invest in security. We will also discuss security implementations during the pandemic, as well as current security issues.

Speaker: John Anthony Smith, Conversant Group

**10:15 – 10:30  
Break**

**10:30 – 11:45 AM**

**Roundtable: How to Effectively Use Office 365**

During this facilitated roundtable discussion, we will address the challenges of integrating Office 365 into the Small Firm ecosystem. We will discuss: licensing models (price versus benefits); 365 components such as OneDrive for Business, Teams, etc.; which tools you should implement; what out-of-the-box 365 affords you; managing updates; and aligning all of this with the strategic direction of your firm. Please come with your questions to add to this insightful discussion.

Moderator: Kenny Leckie, Traveling Coaches

**11:45 -12:00 PM  
Wrap Up**