

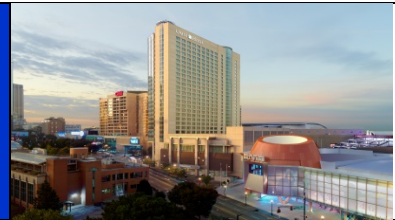


2016 ORION USER CONFERENCE SESSION GUIDE

2016 Orion User Conference
Participate. Integrate. Elevate.

October 24-26, 2016

Omni Hotel at CNN Center Atlanta, GA



ORION SESSIONS

MONDAY, OCTOBER 24, 2016

Welcome & Introductions

8:30 AM – 9:00 AM

Paul Yelton, President Orion Law Management Systems, Inc.

Welcome! As many of you know, the focus of the Orion User's Conference is on education. Most of the sessions have been designed to assist you in using the Orion software to its fullest potential and offer tips on improving your firm's procedures. This year is no different. Sit back and relax, learn, interact with our staff and your peers and above all, have fun.

**Keynote Address – Building Effective Teams:
The Importance of Law Firm Leadership**

9:00 AM – 10:15 AM

Debbie Foster, Partner, Affinity Consulting Group

Successful firms have leadership coming from key employees throughout the organization including YOU! Successful teams have great leaders. This session will give specific examples of how to handle the types of issues team leaders face every day and turn them into a positive through leadership and team building tips and techniques.

What's New in Orion – Overview

10:45 AM – 11:45 AM

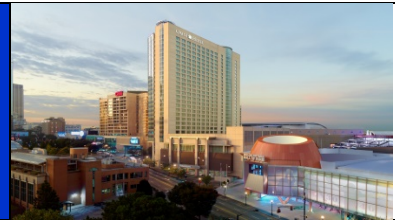
Orion Staff

Did you know that we've made hundreds of enhancements/changes to Orion since our last User Conference just two years ago? In addition, we've released several new features while taking time to significantly enhance Orion in ways to improve overall efficiencies in your firm as well as to better address more complexed billing requirements by your Clients. We'll review each of these enhancements that you'll be sure to want to take advantage of in order to better serve your firm and Clients. In addition, you'll learn about new features that will be incorporated in the near future with "vNext".



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MONDAY, OCTOBER 24, 2016

Preparing and Presenting the Month-End Financial Package

1:15 PM – 2:00 PM

Joe Simmons, CPA, Simmons Advisory Services, Inc.

Joe Simmons has always been a favorite at our user group meetings. He has years of experience as a law firm CFO, consultant and a CPA including over 15 years supporting Orion users. For this session Joe will provide his unique insight while discussing the preparation of the Month-End Financial Package for your executive staff.

Using Orion to Meet the Unique Needs of your Clients

2:15 PM – 2:45 PM

3:15 PM – 4:00 PM

Cindy Shirley & Kevin Harris, Orion Law Management Systems, Inc.

In this session, Cindy Shirley and Kevin Harris will focus on using Orion to address unique and/or alternate billing situations that are required by your clients. Cindy Shirley will start by showing you “tips and tricks” for managing such items as electronic billing, unique rate structures, split billing, multi-payer and flat fee/task based billing. Kevin Harris will follow this by providing a practical tutorial on meeting unique needs using the Orion Invoice Styler and E-Mail Template designer.

What’s New from Orion Support

4:15 PM – 5:00 PM

Jon Yelton & Cindy Shirley, Orion Law Management Systems, Inc.

In this session, Jon Yelton will fill you in on all the new ways our support team can help you get the answers you need --- Fast! This includes a new Support System and updates to Orion’s Knowledgebase. Finally, we’ll introduce you to our new User Forum to help you communicate and discuss Orion-related topics with fellow users.



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ORION SESSIONS

TUESDAY, OCTOBER 25, 2016

Tips & Tricks/Ask the Experts

8:30 AM – 10:15 AM

Orion Staff

Back by popular demand! This is always a crowd-pleaser for our attendees. The Orion staff will show you some of our favorite capabilities that you didn't know Orion can do. We'll cover all aspects of Orion in this session, so there's always something for everyone. As time allows we'll also take questions and give you answers straight from the experts.

Sanity Software – Orion Practice Management

10:45 AM – 11:45 AM

Steve Best, Partner, Affinity Consulting Group

It's impossible to properly manage any law practice if you don't have a good handle on the status of every matter. Rules of professional responsibility require that lawyers act with reasonable diligence and promptness when representing a client. Practice Management software is designed to help you do just that. Practice management simply ties everything together at the matter level and is far superior to simply using Outlook. In fact, Outlook doesn't even come close to the features and efficiencies of Practice Management and we'll show you why. In this session, we'll review Orion's Practice Management functionality and show you how your firm will soar to new levels of efficiency, productivity and cooperation.

Orion Visual Analytics

1:15 PM – 2:00 PM

Carl Mack, Intellimetrics LLC.

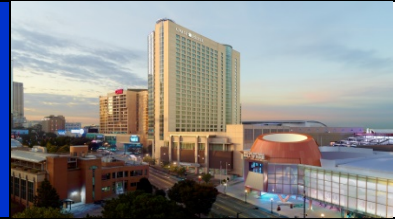
The printed report can only take your analysis so far. In this session, Carl Mack will introduce you to new ways to create visualizations of key metrics that every law firm needs. Imagine using your Orion database to prepare and distribute graphics, visualizations, drill-downs, business intelligence ("BI Your Way") and custom views.



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ORION SESSIONS

TUESDAY, OCTOBER 25, 2016

Reporting – Back to the Basics

2:15 PM – 2:45 PM

Paul Yelton & Cindy Shirley, Orion Law Management, Inc.

Sometimes all you need is quick and easy. In this session Paul Yelton and Cindy Shirley will show you how to quickly develop simple reports using some very powerful Orion tools. To begin with, they'll demonstrate how various grids in Orion can be used to develop the exact list or report needed. Next, Cindy will take you through Orion's "GL Live" interface which allows firms the ability to develop customized drill-down capable financial statements. Finally, Paul and Cindy will explain how easy it is to use other tools to mine data from Orion.

Leveraging Orion to Create a More Efficient Law Firm

3:15 PM – 5:00 PM

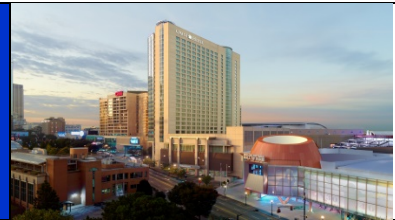
Paul Yelton & Kevin Harris, Orion Law Management, Inc.

This session will have something for everyone. We'll touch on virtually all areas of Orion as we show you how to incorporate work-flow tools and other key software features to create efficiencies for your law firm. We promise that this session will teach you ways to use Orion that you never considered.

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ORION SESSIONS

WEDNESDAY, OCTOBER 26, 2016

Orion Reporting Fundamentals

8:30 AM – 10:15 AM

Paul Yelton and Cindy Shirley, Orion Law Management, Inc.

In this session we will review several key productivity reports and provide full explanations regarding the information they contain. We'll use this information to show how all Orion reports can be employed as a foundation to help you generate new styles that are unique to your requirements. We'll provide several examples of the ways other firms have used standard Orion reports to develop new formats that have greatly benefited them.

What's next? Version 5 and Beyond

10:45 AM – 11:45 AM

Orion Staff

We hold this session at every user group meeting. Here is where you get to tell us what you want to see in the next version from Orion. Give us your best thoughts on what is important to you. We take every one of your ideas seriously. Help us to keep our software the absolute best!

