



LEAD THE CHANGE

TLOMA CONFERENCE & TRADE SHOW

SEPTEMBER 16-19, 2025 WHITE OAKS CONFERENCE RESORT & SPA

Wednesday, September 17th

AI-Powered Leadership: Rethinking Project Management for Law Firm Success

Plenary

11:15 AM – 12:00 PM

Sponsored By:



Description

Managing strategic initiatives in a law firm requires more than just keeping projects on track—it demands creativity, problem-solving, and the ability to navigate competing priorities. In this session, Debbie Foster will explore how AI can enhance project management by streamlining workflows, automating routine tasks, and providing data-driven insights that improve decision-making.

Beyond efficiency, AI can serve as a strategic thought partner, offering fresh perspectives, sparking creativity, and helping leaders rethink long-standing challenges. Stay ahead of the curve by exploring how AI is transforming project management and firm leadership and walk away with actionable strategies to drive meaningful progress on your firm's most critical initiatives.

Speaker

- **Debbie Foster**, Affinity Consulting

Session Materials

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Thursday, September 18th

Elite Showcase - Workshop 1A - The Good, The Bad and the Ugly: Artificial Intelligence from an Insurance Perspective

Workshop

10:00 AM – 10:45 AM

Sponsored By:



Description

Explore the real-world impact of AI on law firms through the lens of insurance.

In this workshop **Purves Redmond Limited** will:

- Outline the leading artificial intelligence (AI) claims which are impacting law firms such as deepfakes, wire transfer fraud and DDoS attacks
- Provide advisory surrounding traditional law firm insurance policies, such as cyber, E&O and office package and whether or not they cover AI risk/exposure
- Discuss examples of some current AI insurance policies, specifically crafted for law firms and the application process

This is a session you'll want to attend before you renew your insurance policy. Don't miss this opportunity to learn what's covered, what's not, and what's coming next in the evolving landscape of AI and legal insurance.

Speaker

- **Candace Pietras**, Purves Redmond Limited, National Professional Services Leader

Session Materials

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Workshop 1B - Measuring What Matters: The What, How and Why around KPIs

Workshop

10:00 AM – 10:45 AM

Sponsored By:

Actionstep

Description

Key Performance Indicators (KPIs) should drive our decisions, and you may have heard, “What gets measured gets done.” It’s not enough to just look at balance sheets, trust accounts, profit & loss statements, AR and AP reports, and time entry statistics. In this session, we will explore the options for the numbers that matter and how to use them to make appropriate decisions to keep your firm successful.

This session will help you:

- Explain the importance of metrics to others in your firm
- Identify which metrics to focus on
- Create plans to improve your practice

Speaker

- **Debbie Foster**, Affinity Consulting

Session Materials

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Leadership Transformed: How to Lead, Engage & Inspire Today's Workforce for Greater Growth

Plenary

11:00 AM – 12:00 PM

Sponsored By:



Description

In a rapidly evolving business landscape, leadership is more critical than ever. Yet, organizations are facing a major challenge—engaged employees and effective leaders are in short supply. Studies show that over 40% of employees are not fully engaged, and organizations report that 77% of leadership is lacking. Renowned Leadership speaker Rick Denley will introduce his proven Change Growth Formula, designed to help leaders and organizations navigate uncertainty and unlock their full potential.

In this engaging session, attendees will participate in interactive exercises and gain actionable insights into five essential areas of modern leadership:

1. **Embrace Change** – Change is constant, whether invited or unexpected. Leaders must train their minds to be adaptable and open to navigating change successfully.
2. **Prioritize People** – Shift the focus from processes and procedures to empowering employees. Provide career paths, mentorship opportunities, and space for employees to pursue their passions.
3. **Lead with Courage & Vulnerability** – Effective leadership requires empathy, humility, and trust. By demonstrating vulnerability, leaders create environments where employees feel valued and heard.
4. **Build a Positive Culture** – Cultivate a workplace of mutual trust, respect, inclusivity, and appreciation. Encourage collaboration while dismantling toxic, high-stress, or biased environments.
5. **Align Passion with Purpose** – Understand what drives your employees and help them connect their passions to the company's overarching purpose. Inspire and motivate people by connecting their work to a greater mission.

This session will equip attendees with the essential skills, tools, and confidence needed to lead people and teams through today's complex challenges. Whether you're a seasoned leader or stepping into a new role, you'll walk away with strategies to drive growth, engagement, and long-term success in your organization.

Speaker

- **Rick Denley**, Peak Performance Leadership, Founder

Session Materials

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Additional Materials – [Building A Culture of Trust](#)

The Strategic Planning Gap: From Planning to Implementation

Plenary

1:30 PM – 2:30 PM

Description

Is your firm's strategic plan a roadmap for success, or just another document gathering dust? Too often, firms invest time and effort into developing strategic plans that never get fully implemented (if at all). This session will break that cycle by providing practical guidance on how to turn a strategic plan into an actionable, results-driven roadmap.

Key Takeaways:

- **Unlock the Full Potential of Your Strategic Plan** – Learn how to move beyond planning and into execution.
- **Avoid Common Pitfalls** – Discover why strategic plans fail and how to ensure yours doesn't.
- **Create an Actionable Roadmap** – Gain step-by-step guidance on operationalizing your firm's plan, starting immediately.
- **Assess & Improve Your Firm's Strategy** – Review the key elements of an effective strategic plan and how to refine an outdated one.
- **Lead Strategic Conversations** – Equip yourself with the tools to guide firm leadership in developing or revitalizing a strategic plan.

This session is essential for anyone looking to bridge the gap between strategy and execution. Whether your firm has an outdated plan, no plan at all, or struggles with implementation, you'll leave with practical strategies to drive real, measurable results.

Speaker

- **Kelly Margani**, Southren Group, CEO + Strategic Coach

Session Materials

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Workshop 2A - AI and the Law: Navigating Compliance and Responsibility

Workshop

2:45 PM – 3:30 PM

Sponsored By:



Description

This workshop will address reasonable AI governance practices you can implement for legal practitioners, including the development of an effective AI policy and training program, informed by current legal requirements, that allows your lawyers and other legal professionals to harness the power of these new tools while also mitigating the ethical and other risks they entail.

Speaker

- **Maura Grossman**, Research Professor and eDiscovery Lawyer/Consultant/Expert/Special Master

Session Materials

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Workshop 2B - Your Compensation Playbook for Bill 149 – Are you ready for January 2026?

Workshop

2:45 PM – 3:30 PM

Description

Session Summary: Bill 149: Job Postings, Pay Transparency and Employer Requirements

Curious about how compensation really works in law firms and how the updates to Bill 149 affect the Firm you work at? This fast-paced, essentials-only seminar is your go-to guide for understanding **pay transparency, salary ranges, and compensation strategies** in the legal sector. Whether you're in HR, management, or just want to better understand your firm's pay practices, this session will break down the basics in a clear, digestible format.

You'll learn:

- **How to interpret compensation survey data** and apply it meaningfully within your firm.
- **What salary ranges really mean**, and how they support equity, retention, and transparency.
- **What your firm needs to do now** to prepare for **upcoming legislative changes** around pay transparency and reporting.

No fluff—just the essentials you need to decode compensation, stay compliant, and get your firm future-ready.

Speaker

- **Katherine Mather**, Koskie Minsky LLP, Director of Human Resources

Session Materials

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Closing Keynote: Reimagine The Future with AI

Keynote

3:45 PM – 4:45 PM

Description

We're entering an extraordinary era where generative AI and agents will automate unprecedented parts of legal operations — making operations faster, smarter, and more efficient than ever before. At the same time, the baseline expectations of our clients keep rising. The organizations that will thrive aren't those with the most advanced technology, but those who master the delicate balance between automation and extraordinary client experiences. This is about trust.

[Shawn Kanungo](#) provides a bold, unique and contrarian view of the near term-future. He outlines how legal professionals can embrace these new disruptive trends, but at the same time, create an extraordinary client experience. He argues that, in an AI-world, the future of law office management is trust.

In this awe-inspiring talk, Shawn Kanungo provides an optimistic roadmap for the future. He explores how we can take unexpected approaches to innovation to remain competitive and relevant.

Speaker

- [Shawn Kanungo](#)

Session Materials

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