



Oregon Law Institute  
of Lewis & Clark Law School

# Moving Your Discovery Practice from Dial-Up to Broadband: *Demystifying the Technology*

**T**he accelerating increase in electronically-stored information, coupled with changes in the Rules of Civil Procedure, means that lawyers must understand the technology that is driving e-discovery. One of the ways you can learn about e-discovery and the latest technology is to attend this CLE featuring technology and legal experts who will address the unique discovery and case management issues related to document-intensive litigation. This includes litigation strategies for preparing and responding to production requests, the use of technology tools to reduce production costs and efficiently conduct document review, and recent decisions and their practical applications for handling electronic discovery.

As a bonus, you can meet technology vendors, collect information, and see the technology at work behind e-discovery.

**FRIDAY, MARCH 18, 2011**

Oregon Convention Center  
777 NE Martin Luther King Jr. Blvd.  
Portland, Oregon

**6.5 General and .5 Ethics** MCLE Credits

# SCHEDULE

- 8:00 a.m. LATE REGISTRATION AND DISTRIBUTION OF MATERIALS
- 8:25 WELCOME AND INTRODUCTION
- 8:30–9:30 **Information Management and Identification**
- Responding to the overly broad demand letter
  - Dealing with the client who has failed to preserve
  - Technology used in information management
  - Technology to assist in issuing and managing the litigation hold
  - Why and how to interview IT, HR, and records management
  - Data mapping
    - *Aaron J. Cronan*
- 9:30–10:30 **Collection**
- Self-collect vs. vendor collect
  - Forensic images vs. native file collections
  - Ongoing preservation obligations
  - Tiered discovery
  - Demonstration of forensic and native file collection from computer and cell phone
    - *Michael A. Bean*
    - *Seth H. Row*
    - *Michelle Servo*
- 10:30–10:45 BREAK
- 10:45–11:30 **Conferring, Communicating, and Cooperating**
- Common communication breakdowns
  - The lawyer’s role and lessons learned from *Qualcomm* and *Pension Committee*
  - Applying the Sedona Conference’s Cooperation Proclamation
  - Rule 26(f) conference
  - Proportionality
  - File formats
  - State court rule changes
    - *Johnathan E. Mansfield*
- 11:30–12:00 **Processing**
- Mock conversation between paralegal/associate attorney and vendor addressing, among other issues, file formats, cost, chain of custody, and concerns about privilege
  - Brief demo of processing software
    - *Tammy Armentrout*
    - *Michael A. Bean*
    - *Michelle Servo*
- 12:00–1:00 NETWORKING LUNCH  
Box lunch is included with registration at live program. Sponsored by Evolve Discovery.
- 1:00–2:00 **Early Case Assessment Technology and Review Platforms**
- Uses and applicability of investigation platforms
  - The expanding capabilities of review platforms
  - Identifying the platform that’s right for your project
  - Managing large-scale document review
    - *Stephanie K. Hines*
    - *Nicholle Winters*

# SCHEDULE (cont.)

- 2:00–2:45     **How Do I Pick a Vendor and What Will it Cost?**
- *A la carte* vs. fixed price menu
  - The vendor scorecard
    - *Katherine Heekin*
    - *Susan Wheeler*
- 2:45–3:00     BREAK
- 3:00–4:00     **Dealing with Third Parties: Social Networks and Cloud Computing**
- Discovery from webmail and social networking providers
  - Tips and traps associated with data stored “in the cloud”
  - Forensic and evidentiary issues
    - *David H. Angeli*
    - *Seth H. Row*
- 4:00–4:30     **Ethical Excesses in E-discovery**
- Advising your client what to demand and what to keep/destroy
  - Pre-production review and reliance on clawback provisions
  - Self-help e-discovery
    - *Peter R. Jarvis*
    - *Roy Pulvers*
- 4:30 p.m.     ADJOURN

# Program Faculty

## **David H. Angeli**

*Angeli Law Group LLC*

## **Tammy Armentrout**

*Bullivant Houser Bailey PC*

## **Michael A. Bean**

*President, Affirm Discovery*

## **Aaron J. Cronan**

*Attorney at Law*

## **Katherine Heekin**

*Program Planner  
The Heekin Law Firm*

## **Stephanie K. Hines**

*Perkins Coie LLP*

## **Peter R. Jarvis**

*Hinshaw & Culbertson LLP*

## **Johnathan E. Mansfield**

*Schwabe Williamson & Wyatt*

## **Roy Pulvers**

*Hinshaw & Culbertson LLP*

## **Seth H. Row**

*Parsons Farnell & Grein, LLP*

## **Michelle Servo**

*Practice Technology Services  
Project Manager,  
Perkins Coie LLP*

## **Susan Wheeler**

*Senior Litigation Consultant,  
Evolve Discovery*

## **Nicholle Winters**

*Perkins Coie LLP*

## **LIVE PRESENTATION**

**Portland – 3/18/11**

Oregon Convention Center  
777 NE MLK Jr. Blvd.

## **MCLE CREDIT**

*Moving Your Discovery Practice From  
Dial-Up to Broadband—Demystifying the  
Technology* will receive 6.5 General and  
.5 Ethics MCLE credits.

## **PROGRAM PRODUCTS**

Even if you cannot attend, you can still get the program on CDs or DVDs. Use the order form in this brochure to order your set today! OLI Annual Passholders may purchase OLI program products at 50% off the full retail price.

## **QUESTIONS?**

Please call OLI at (503) 768-6580 in Portland or toll-free in Oregon at (800) 222-8213, e-mail us at [oli@lclark.edu](mailto:oli@lclark.edu), or visit our website at <http://go.lclark.edu/oli>.

## **VIDEO REPLAYS**

Please register at least one week prior to the replay date.

**Bend – 4/1/11**

**Replay 8:30 a.m.**

Bryant Lovlien & Jarvis  
591 Mill View Way

**Eugene – 3/25/11**

**Replay 8:30 a.m.**

Harrang Long Gary & Rudnick PC  
360 East 10th Avenue, Ste. 300

**Medford – 3/25/11**

**Replay 8:30 a.m.**

Kellington Krack Richmond  
Blackhurst & Glatte LLP  
23 Newtown Street

**Portland – 4/6/11**

**Replay 9:00 a.m.**

Oregon Law Institute  
Gus J. Solomon Courthouse  
620 SW Main Street, Ste. 706

# Moving Your Discovery Practice from Dial-Up to Broadband: *Demystifying the Technology*

Friday, March 18, 2011

Name

OSB No. or Profession

Firm/Organization

Street Address

City/State/Zip

Phone

E-Mail

Please "✓" appropriate box below:

 Live presentation Video replay. Location: \_\_\_\_\_ Date: \_\_\_\_\_  
Please register at least one week prior to the replay date.

## TUITION

*(Prices apply to live and video replays. Live program includes a box lunch.)*

- \$179** Early registration (*received by March 14, 2011*)
- \$139** New attorneys (admitted 2009–2010) and legal staff (*received by March 14, 2011*)
- \$90** Legal aid attorneys (*received by March 14, 2011*)
- \$15** OLI Passholder (OLI Pass No. \_\_\_\_\_) (*received by March 14, 2011*)
- \$20** Add to above tuition if registration received *after March 14, 2011*

Box Lunch Options at Live Seminar:

- Chicken Breast     Vegetarian     Ham     Roast Beef

## PRODUCT ORDER

*I am unable to attend. Please send me:*

- \$199** Audio CDs and course book
- \$299** DVDs and course book
- \$59** Course book only
- Deduct 50% from product order if you are an OLI Passholder (OLI Pass No. \_\_\_\_\_)
- \$7.00** *Note: Add \$7.00 shipping & handling fee to above product orders.*

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Check out our website at <http://go.lclark.edu/oli>  
or e-mail us at [oli@lclark.edu](mailto:oli@lclark.edu).

**CONFIRMATION:** Confirmation will be sent via e-mail.**CANCELLATION POLICY:** Tuition minus a \$20 handling charge will be refunded if the cancellation request is *written and received* by Monday, March 14, 2011.**NEED ASSISTANCE:** If you are a person with a disability, please let OLI know in time to make any necessary accommodations for you.**TUITION ASSISTANCE:** A limited number of scholarships are available based on financial need. Contact OLI.