2023 AILA Technology and Innovation Summit & Webcast

The 2023 AILA Technology and Innovation Summit unites thought leaders, technology influencers, and immigration law practitioners to provide insight into what's happening now, what to watch for, and how we can shape the future of immigration practice through technology innovation. Join us in San Francisco on Thursday, October 26, 2023, as we explore key trends and emerging technologies impacting the future of law practices, as well as technology solutions you can incorporate into your practice now. This year's program considers the emerging role of artificial intelligence (AI) in the legal field, how to leverage new and existing technology, disruptors in the delivery of legal services, and the steps required to successfully implement new tech into your practice.

The summit will be held in conjunction with and immediately precede the 36th Annual AILA California Chapters Conference and Webcast.

October 26, 2023
Westin St. Francis on Union Square
San Francisco, CA

Times listed on the program are Pacific Time (PT)

Thursday, October 26, 2023

7:00 am – 5:55 pm	**Registration and Exhibits**
7:50 am – 8:00 am	**Opening Remarks** ***Farshad Owji, AILA President, San Francisco, CA*
8:00 am – 9:00 am	**One Year In: Using CHATGPT and Other Generative AI in Your Firm** As generative AI becomes more prevalent in our daily lives and practice, understanding what it is becomes more important. How can we better understand its trajectory to position our firms to successfully adopt new technologies while avoiding potential pitfalls? Join these AI pioneers for a practical and illuminating conversation moderated by immigration tech entrepreneur, Julie Pearl.

- A brief history of legal AI
- The advent and growth of ChatGPT and similar products
- Current benefits and potential pitfalls for lawyers and their firms
- The year ahead and beyond

* = invited, not confirmed

Faculty:
Julie C. Pearl (DL), Conference Planning Committee, Palo Alto, CA
Pablo Arredondo, Co-Founder and Chief Innovation Officer, Casetext, Stanford, CA
*Joshua Walker, Author, Legal AI, Co-Founder and Founding Executive Director, CodeX, Lex Machina, San Francisco, CA

9:00 am – 9:30 am **Networking Break**

9:30 am – 10:30 am **Ethical Use of AI in Your Practice and How it Affects Your Clients (ETHICS)**
Chatbots, generative language models, voice recognition/transcription software, and other AI technologies show great promise. These and other new technologies may empower lawyers to provide better client service at a lower cost. But lawyers cannot blindly use these technologies. Lawyer competence requires they understand the technologies they use and that the government uses.
- Competence: skills needed in the application of technology to law practice
- Preserving privilege: key components of user licensing agreements that protect you and your clients when implementing technology
- Confidentiality: meeting your obligation to protect clients' information used with AI tools
- Understanding bias: how AI tools can incorporate bias in their data sets and algorithms and how to advocate for your clients

Faculty:
William A. Stock (DL), AILA Past President / AILA Investment Committee Chair, Philadelphia, PA
Michele N. Carney, AILA Innovation and Technology Committee Chair/AILA Ethics Committee, Seattle, WA
Gregory Howard Siskind, AILA Board of Governors, AILA Author, AILA's Immigration Law Practice and Procedure Manual: A "Cookbook" of Essential Practice Materials, 3rd ed., *Memphis, TN*
*David Wang, Chief Innovation Officer, Wilson Sonsini Goodrich & Rosati, Menlo Park, CA

10:30 am – 11:00 am **Networking Break**

11:00 am – 12:00 pm **Making Change Management Successful: Strategies That Stick the Landing**
Immigration law firms trying to become more efficient, particularly through the use of technology, often run into the same few quandaries that prevent real progress. What are you really trying to improve at your firm? What technology do you really need for that improvement, if any? And once you choose the right tech for your firm, how do you ensure its successful adoption? Large corporations have dealt with these questions for decades and have created methodologies that help them find the right answers. In this panel, panelists will look at some of these methodologies, namely Lean Six Sigma and Change Management, and adapt them to the immigration law firm context—from solo and small firms to mid-size and large practices.

- Lean Six Sigma and Change Management methodologies defined: what they seek to accomplish
- Examples of how large corporations use these methodologies
    - Lean Six Sigma origins at Toyota and Motorola
    - Change Management as a framework
- Adapting these methodologies as an immigration law firm
- Next steps for interested firms

Faculty:
Roman Zelichenko (DL), Kew Gardens, NY
Rami D. Fakhoury, Troy, MI
Dan Maranci, AILA Innovation & Technology Committee, Boston, MA

12:00 pm – 1:00 pm   **Lunch (Provided)**

1:00 pm – 2:00 pm   **Customizing Existing Technology to Achieve a Client-Centered Practice**
Although some firms have made exciting advances in building new technology, developing a new product in-house is not the only way to innovate. Others are applying design thinking principles to customize out-of-the-box software to get exactly what they want and achieve a client-centered practice. Join these panelists as they dive into the tools and processes they employed to improve their practices by using existing technology in new and exciting ways.
- Collecting user experience feedback
- Being responsive to client feedback and experimental in your approach
- Solving problems in an innovative way that isn't fearful of failure
- The tools lawyers use to intentionally improve client and worker experiences

Faculty:
Ruby Lichte Powers (DL), AILA Author, Build and Manage Your Successful Immigration Law Practice (Without Losing Your Mind), *Houston, TX*
*Jeffrey OBrien, AILA Innovation and Technology Committee, Berkeley, CA
*TBD

2:00 pm – 2:30 pm   **Networking Break**

2:30 pm – 3:30 pm   **Current Disruptors of the Practice of Law, the Evolving Regulatory Landscape, and Coming Change**
Join us for a captivating panel discussion as we embark on a journey through the evolving regulatory landscape of the legal field and emerging disruptors. Advocates for reforming Rule 5.4 and similar restrictions on nonlawyer involvement in the practice of law believe it is the only viable option for increasing access to justice and fostering innovation in the legal field, but technology and nontraditional methods can also be used to increase legal service access to underserved populations. Our panel will challenge conventional thinking and explore the emerging disruptors that are reshaping legal practice. Prepare to be inspired, equipped with fresh perspectives, and discover untapped opportunities in this era of change.

- Lawyer regulation update and reforms to Rule 5.4, nonlawyer ownership of law firms and what it means for competition
- Disruptors of the practice of law
- Limited scope and unbundled services
- Future practice of law: understanding the new client experience and how to continue to thrive

Faculty:
Reid Trautz (DL), Senior Director, AILA Practice and Professionalism Center and Innovation, Washington, D.C.
*Chase Hertel, President and Counsel Consumer at SimpleCitizen, Chicago, IL
Xiao Wang, Co-Founder and CEO, Boundless Immigration, Seattle, WA

* = invited, not confirmed

3:30 pm – 4:00 pm   **Networking Break**

4:00 pm – 5:30 pm   **Innovators Spotlight**
Even before the launch of AI-based Large Language Model (LLM) technology last year, there have been numerous new products and innovations in the legal space. This "panel" will provide an opportunity for you to hear from several innovators who are launching new products and solutions—including AI-driven solutions—that will address the needs of the immigration legal community.
- What you need to know about the future of technology
- Innovations that will solve key problems and pain points in immigration law
- Understanding the sky is the limit for the future of immigration legal technology and how it can revolutionize the client experience

Moderators:
Hannah Faith Little, AILA Conference Planning Committee Chair/ AILA Innovation and Technology Committee, Charlotte, NC
Ron Matten, AILA Innovation and Technology Committee, Conference Planning Committee, West Hollywood, CA

Time TBD   **Joint Reception with the California Chapters Conference**

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Conference Program Committee

Hannah Faith Little, AILA Conference Planning Committee Chair, Charlotte, NC
Michael A. Harris, Innovation and Technology Committee, Miami, FL
Ron Matten, AILA Innovation and Technology Committee, West Hollywood, CA
Julie C. Pearl, Palo Alto, CA
Ruby Lichte Powers, AILA Author, Build and Manage Your Successful Immigration Law Practice
(Without Losing Your Mind), *Houston, TX*
William A. Stock, AILA Past President/AILA Investment Committee Chair, Philadelphia, PA
Roman Zelichenko, Kew Gardens, NY

Charity Anastasio, Practice and Ethics Counsel, Practice and Professionalism Center and Innovation, Washington, D.C.
Emmie R. Smith, Associate Director of Education, Washington, D.C.
Reid Trautz, Senior Director, AILA Practice and Professionalism Center and Innovation, Washington, D.C.

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