# PLAA

## EDUCATION CONFERENCE

2025

WHERE EDUCATION SPARKS CARNIVAL DELIGHT!

SEPTEMBER 18-20, 2025

SEVEN SPRINGS
MOUNTAIN RESORT

# SCHEDULE OF EVENTS

## THURSDAY, SEPTEMBER 18, 2025

| | | |
|---|---|---|
| 9:00 – 10:00 a.m. | Golf Registration | |
| 10:00 – 3:00 p.m. | Golf Scramble — Shotgun Start | Highlands Golf Club at Seven Springs |
| 4:00 – 5:00 p.m. | Conference Registration | Matterhorn Entrance |
| 4:30 – 6:30 p.m. | Welcome Reception | Matterhorn and Deck |
| 6:30 – 8:00 p.m. | **The Energy Effect**<br>KEYNOTE SPEAKER: KRISTEN BROWN | Matterhorn |
| 8:00 – 10:00 p.m. | Entertainment by Sound Advice Entertainment<br>*(traveling magician, tarot card reader, photo booth)* | Matterhorn and Deck |
| 6:00 – 11:00 p.m. | Exhibit Setup for Business Partners Only | Alpine Room |

## FRIDAY, SEPTEMBER 19, 2025

| | | |
|---|---|---|
| 7:00 – 8:30 a.m. | Breakfast Buffet | Slopeside Dining Room |
| 8:00 – 12:00 p.m. | Exhibit Setup for Business Partners Only | Alpine Room |
| 8:15 – 8:45 a.m. | Conference Registration | Wintergreen |
| 8:45 – 9:45 a.m. | **The ABC's of Business Process Automation**<br>Mike Wasco | Wintergreen |
| 10:00 – 11:00 a.m. | **Bringing Your Strategic Plan to Life: Communication, Alignment, and Execution**<br>Joel Burstein | Wintergreen |
| 11:15 – 12:15 p.m. | **Your Firm's Financial Report Card: Are you best-in-class, in the pack or in the back?**<br>Gary Allen | Wintergreen |
| 12:45 – 1:30 p.m. | Lunch | Matterhorn and Deck |
| 1:30 – 3:30 p.m. | **Business Partner Exhibit Show** | Alpine Room |
| 3:00 – 5:00 p.m. | Cocktail Reception | Alpine Room and Deck |
| 6:00 – 7:30 p.m. | Dinner | Foggy Goggle |
| 7:30 – 11:00 p.m. | Free Time (DJ/Band provided by Foggy Goggle) | Foggy Goggle |
| 7:30 – 9:30 p.m. | Axe Throwing | Foggy Goggle — Axe House |

## SATURDAY, SEPTEMBER 20, 2025

| | | |
|---|---|---|
| 7:00 – 8:30 a.m. | Breakfast Buffet | Slopeside Dining Room |
| 9:00 – 10:15 a.m. | **Tales from the Trenches**<br>Pam Cochenour | Wintergreen |
| 10:30 – 11:45 a.m. | **Building a Firm & A Career You Love**<br>KEYNOTE SPEAKER: TARA OWENS ANTONIPILLAI | Wintergreen |

# A MESSAGE FROM THE PRESIDENT



## CAROLYN HINSON

Caroselli Beachler & Coleman, LLC

I am so excited about the upcoming Education Conference at Seven Springs this Fall. It is an amazing opportunity to experience great education and networking with all of our fellow PLAA members. And then to top it off — we can enjoy the Business Partner Show at the same time and catch up with our amazing Business Partners. I went to my first Local Education Conference when I joined the PLAA in 2001 and several members made me feel so welcome and I had a fantastic time. All these years and I only missed one conference. I hope to see you all there in September!

# OUR COMMITTEE



### TRACY L. VECCHIO

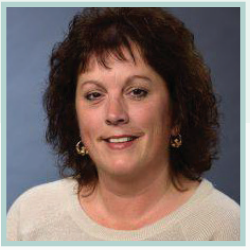
Education Conference Co-Chair



### BRIAN J. FRANK

Education Conference / Golf Co-Chair

Sherrard, German & Kelly, P.C.



### TRACY L. PAPE

Education Program Chair

Zimmer Kunz, PLLC



### LYNN CARMICHAEL

Registration Chair

Houston Harbaugh, P.C.



### SANDRA FANTINI

Business Partner Chair

Papernick & Gefsky



### JENNIFER SNYDER

Entertainment Chair

Tucker Arensberg, P.C.



### GREG RUSH

Golf Co-Chair

GRB Law

# THE ENERGY EFFECT



## KRISTEN BROWN

HAPPY HOUR EFFECT, LLC

## THURSDAY, SEPTEMBER 18 | 6:30PM – 8:00PM

Unblock your energy to lead with confidence, clarity, and real impact!

As a legal administrator, you're the engine behind your firm's success—but burnout, constant demands, and misaligned goals can drain your energy fast. In The Energy Effect, Kristen Brown shares a practical and energizing framework designed just for you. You'll learn how to tap into the 7 Energies—Vision, Strategy, Communication, Relationships, Confidence, Creativity, and Motivation—to boost your personal performance and support your team more effectively.

### KEY TAKEAWAYS

- Discover where your own energy gets blocked—and how to recharge fast
- Use the 7 Energies to lead with more influence, calm, and clarity
- Empower your team by modeling energy-driven leadership every day

Walk away refreshed, refocused, and ready to lead with impact—no burnout required.

### ABOUT KRISTEN:

Kristen Brown is a high-energy keynote speaker, expert trainer, and Signature Energy consultant who helps organizations and the people who power them create breakthrough results even amidst change and stress. Leveraging her journey through 15 years of corporate leadership while a young widowed mom, Kristen has transformed workplace dynamics using her 7 Energies Flow Formula for groups around the world. She holds a Master's in Integral Theory and several holistic certifications, offering a comprehensive approach to leadership, change, and results. As a podcast host and featured in Forbes, "Live with Kelly," and more, Kristen is among only 400 active Certified Speaking Professionals worldwide, ensuring a blend of fun, expertise, and dynamic energy, helping organizations and their teams not just adapt, but rise.

APPROVED 2025 CLM® Certified Legal Manager PROVIDER

**CLM® Application Credit:** 1 hour in the category of Communication Skills
**CLM® Recertification Credit:** 1 hour in the subject area of Communications and Organizational Management (CM)

# NOTES

# THE ABC'S OF BUSINESS PROCESS AUTOMATION




## MIKE WASCO

WILKE CPAs & ADVISORS, LLP


## FRIDAY, SEPTEMBER 19 | 8:45AM – 9:45AM

Automation is transforming the legal world! It creates pathways for law firms to deliver legal services or support to clients who always demand faster services with more cost controls. Fueled by new technology, we want to take a hard look at your routine, repetitive tasks so that you can automate them and move onto solving complex legal matters and add the real value.

So, what is automation? How can firms use it in everyday work? In this session, we will define business process automation and explore real life examples of how it can be used in your firm to simplify everyday tasks.

### ABOUT MIKE:

Michael Wasco has worked in public accounting since 1997 and earned his CPA certification in 2000. In the two decades at Kinol Sharie Leyh & Associates in Pittsburgh's North Hills region, he supported law firms and their users while also tackling complex tax issues that law firms face. He transitioned into the legal world, joining a multi-state law firm in 2019, where he oversaw the financial operations that averaged 2,500 invoices per month. He recently returned to public accounting, joining Wilke CPAs & Advisors in January, 2025 as a Tax Manager, and is back in the position of advising individuals, small businesses, and regional law firms on tax matters.

**CLM® Application Credit:** 1 hour in the category of Operations Management
**CLM® Recertification Credit:** 1 hour in the subject area of Operations Management: Technology /Automation (OM)

# NOTES

# BRINGING YOUR STRATEGIC PLAN TO LIFE:
## COMMUNICATION, ALIGNMENT, AND EXECUTION




### JOEL BURSTEIN
BEAM COLLABORATIVE


## FRIDAY, SEPTEMBER 19 | 10:00AM – 11:00AM

Having a strategic plan is only the beginning. This session is designed for law firm administrators ready to move from planning to real execution. We'll explore what happens after the plan is finalized—how to effectively communicate it, engage the right advocates, and ensure day-to-day decisions across departments align with long-term goals.

Participants will walk through common implementation pitfalls and learn how to reinforce the strategic plan across IT, HR, operations, and facilities. We'll also discuss how to create consistent messaging, assign ownership, and use practical communication techniques to drive accountability and progress. Whether you're resolving urgent issues or planning for future growth, this workshop will help you stay grounded in the strategy you've worked so hard to build.

### ABOUT JOEL:

Joel Burstein is the CEO and co-founder of BEAM Collaborative, a strategic advisory firm focused on strengthening the small business ecosystem in southwestern Pennsylvania. Founded in 2020 in response to the region's growing economic disparities, BEAM creates inclusive, sustainable pathways to business ownership through acquisition, succession planning, and long-term growth support.

Joel's entrepreneurial journey began with Keep it Simple Training and Development, a company he built to deliver high-impact leadership development and operational training across multiple industries. Joel then launched BEAM to address the systemic gaps preventing small businesses from scaling—particularly in communities where ownership transitions and local wealth-building opportunities are often missed.

With more than a decade of experience as a Fortune 500 manager overseeing 70+ employees, Joel has worked with executives, mid-level leaders, and front-line supervisors alike—advising on everything from strategic planning to daily execution. His consulting background combines deep operational knowledge with a talent for simplifying complex challenges and aligning teams around measurable results.

Joel serves on the boards of the Pittsburgh Walk of Fame, Neighborhood Allies, and the Team Pennsylvania Foundation, where he continues to champion economic development and locally rooted entrepreneurship.

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**CLM® Application Credit: 1 hour in the category of Legal Industry/Business Management**
**CLM® Recertification Credit:** 1 hour in the subject area of Legal Industry/Business Management (LI)

# NOTES

# YOUR FIRM'S FINANCIAL REPORT CARD:
## ARE YOU BEST-IN-CLASS, IN THE PACK OR IN THE BACK?



### GARY ALLEN
MY LEAN LAW

## FRIDAY, SEPTEMBER 19 | 11:15AM – 12:15PM

Did you know that a typical lawyer may leave $8 million on the table over the course of his/her career due to law firm inefficiencies and suboptimal financial performance? Join this unique, interactive session where you will gain practical information on where your firm stands financially and how you can improve it.

### KEY TAKEAWAYS
After completing this session, participants should be able to:

- Understand and apply the five fundamental law firm metrics for law firm financial success.
- Assess their firm's performance and learn practical strategies for improvement.
- Use practical tools to prioritize financial strategies and not get trapped by inertia.

### ABOUT GARY:
Gary G. Allen, Esq., is a Founder and Board Chair at LeanLaw, a legal timekeeping, invoicing and reporting software company, as well as a retired partner at Givens Pursley LLP where he practiced law for 30+ years. He was only two years out of Stanford Law School when the firm he was working for imploded. It happened again four years later and he was left without a job with a 6-month-old baby to feed. Those experiences created a passion in Allen to help law firms be better businesses, with efficient operations, streamlined financial management, and a laser focus on profitability.

APPROVED 2025 CLM® Certified Legal Manager PROVIDER

**CLM® Application Credit:** 1 hour in the category of Financial Management (FM)
**CLM® Recertification Credit:** 1 hour in the subject area of Financial Management: Information and Analysis (FM)

# NOTES

# TALES FROM THE TRENCHES:
## OUR THORNIEST LEGAL MANAGEMENT EXPERIENCES




### PAM COCHENOUR
VAUGHAN BAIO & PARTNERS


### SATURDAY, SEPTEMBER 20 | 9:00AM – 10:15AM

Join this compelling session to explore the trials, tribulations and downright terror of our thorniest management experiences. You'll uncover what others have learned the hard way, so you don't have to, along with examples of what to do and not to do. This fun, highly interactive session will be conducted in a "fishbowl" style. Newer administrators will be able to bolster their experience and seasoned administrators will be encouraged to share their own scary stories.

### OBJECTIVES:

- Recognize the types of unusual events that may arise in law firms.
- Define effective strategies to manage problematic situations.
- Identify the drivers of ineffective responses.
- Apply recognized best practices to future complex problems.

### ABOUT PAM:

Pamela G. Cochenour brings more than 30 years of legal experience to her practice where she represents employers of all sizes involving employment-related issues. Pam's experience includes the defense of employment discrimination-based lawsuits as well as training frontline and management level employees on gender (including sexual harassment) and age discrimination, retaliation, disability prevention, and the Family and Medical Leave Act (FMLA). She provides day-to-day counseling to human resource professionals on record keeping, disciplinary issues, and policy preparation and implementation.

In her employment litigation practice, Pam represents both private and public sector employers before local, state and federal administrative agencies, and in state and federal courts. Her experience includes handling gender, race, age, and disability-based discrimination cases, sexual harassment allegations, and retaliation claims. She has also represented employers in litigation involving the Fair Labor Standards Act and the Employee Retirement Income Security Act.

Pam is a frequent speaker to private employers and industry groups on topics including employment discrimination, harassment investigations, FMLA policies and practices, and the Americans with Disabilities Act (ADA) as well as the ADA Amendments Act. Outside of her legal practice, Pam has served as the President, Past President, and member of the Board of Directors of Persad Center, the second oldest LGBTQ counseling center in the United States, and Renaissance City Choirs. She served as a member of the Executive Committee of the National Kidney Foundation of Pittsburgh and provides pro-bono employment and governance advice to several other Pittsburgh area non-profit organizations.

**CLM® Application Credit:** 1 hour in the category of Organizational Development Skills
**CLM® Recertification Credit:** 1 hour in the subject area of Legal Industry/Business Management (LI)
**CLM® Application Credit for Functional Specialists:** 1 hour in the subject area of Legal Industry/Business Management (LI) towards the additional hours required of some Functional Specialists to fulfill the CLM application.

# NOTES

# BUILDING A FIRM & A CAREER YOU LOVE



## TARA OWENS ANTONIPILLAI, JD, MAPP

CULTIVATE

## SATURDAY, SEPTEMBER 20 | 10:30AM – 11:45AM

In this program, legal administrators will learn how to build a law firm culture where everyone thrives. Grounded in Self-Determination Theory (SDT) – a well-established, research-backed framework – the program explores how fulfilling core psychological needs leads to a more motivated and resilient workforce. Extensive evidence (including studies within the legal profession) shows that when people feel greater autonomy, mastery (competence), and relatedness at work, their job satisfaction and well-being rise significantly. As a decision-maker and team-builder, you'll discover how to apply these findings to foster higher engagement, retention, and overall firm well-being, as well as how to use these strategies in your career. The result is a proven approach to creating a thriving firm – and enabling careers – that people truly love. Together, let's make this happen for you!

### KEY TAKEAWAYS

- Autonomy – Empowering Ownership & Purpose: Learn how to create an environment that promotes autonomy. From offering flexibility in how work gets done to involving team members in decision-making, you'll gain strategies to increase individuals' sense of ownership and purpose. Empowered professionals who have more control over their work feel trusted and motivated, not micromanaged – leading to greater engagement and initiative, at the same time, making your job easier.
- Mastery – Encouraging Professional Growth: Discover tactics for championing continuous learning and skill-building across your firm. This segment highlights how to support professional development through mentorship programs, training opportunities, and constructive feedback. Research shows that feeling effective and growing in one's role is strongly associated with higher well-being and confidence.
- Relatedness – Cultivating Connection & Mentorship: Find out how to cultivate meaningful professional relationships that enhance engagement and morale. You'll explore ways to strengthen collegiality and belonging – from mentorship networks and team-building initiatives to open-door leadership practices. When people feel supported and connected to their colleagues and the firm's mission, it fuels collaboration, loyalty, and a positive firm culture.
- Stress Management & Resilience – Building a Sustainable Culture: Take away evidence-based techniques to manage stress and promote resilience in your firm. We'll introduce strategies that you can integrate into the firm's daily routine. Forward-thinking firms are already adopting holistic well-being programs to help everyone reduce stress and build personal resilience.

### ABOUT TARA:

Tara Owens Antonipillai, JD, MAPP, is the founder of Cultivate, a consulting, training, and coaching company that utilizes principles of applied psychology and organizational psychology to address workplace well-being challenges.

Tara received her J.D. and undergraduate degree from Georgetown University and was a tax lawyer in Arnold & Porter's Washington, DC office. She holds a master's degree in Applied Positive Psychology from the University of Pennsylvania. Tara did her leadership and performance coaching training at Brown University. She is the Chair of the DC Bar Lawyer Well-being Committee and the Director of Programming for the Institute for Well-being in Law. Tara is also a certified Mental Health First Aid Instructor.

**CLM® Application Credit:** 1.25 hours in the category of Communication Skills
**CLM® Recertification Credit:** 1.25 hours in the subject area of Communications and Organizational Management (CM)

# NOTES

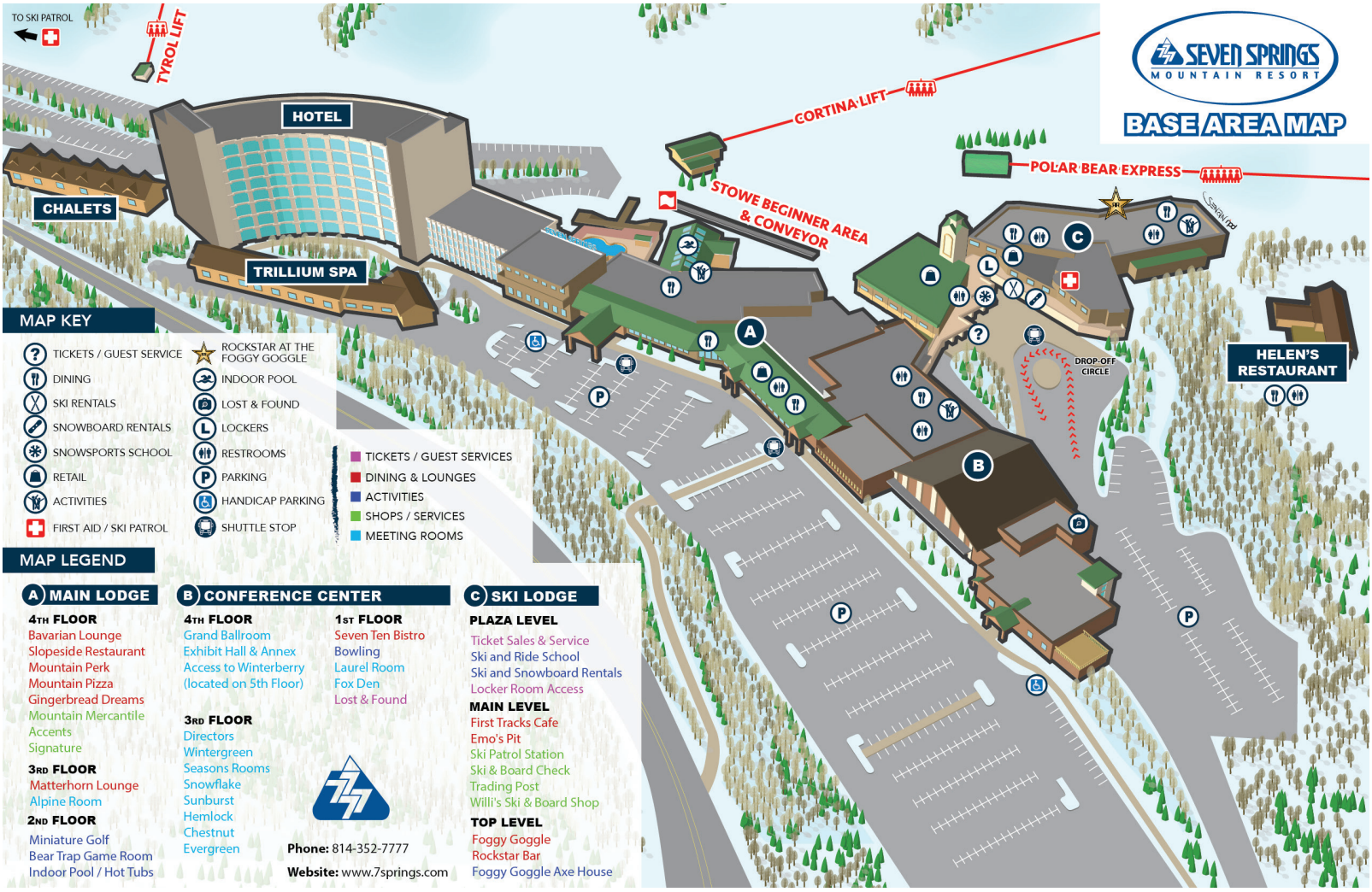
# ONSITE ACTIVITIES

## INDOOR

- Axe Throwing
- Bowling
- Indoor Mini Golf
- Pool
- Hot Tubs

## OUTDOOR

- Alpine Slide
- Chairlift Ride
- Disc Golf
- Paddle Boats
- Paddle Boards/Kayak
- Rock Wall
- Trampoline
- Yard Games: Giant Connect Four, Giant Jenga, Giant Checkers, Corn Hole
- Courtyard Games: Horseshoes, Bocce Ball, Pickle Ball, Basketball, Volleyball



# THANK YOU BUSINESS PARTNERS

The PLAA would like to thank the Business Partners in our community for their continued support of our Chapter. The PLAA recognizes that collaborating with Business Partners is an indispensable resource ensuring that our organization continues to flourish.

As law firm decision makers, we know that the right products and services are key components to successful legal administration; and that our Business Partners play a vital role in the management and daily functions in our firms.

The PLAA is committed to continue cultivation of positive, mutually beneficial relations with Business Partners who serve the legal community.

We thank you again for your support of ALA and PLAA!

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## BRONZE SPONSOR:

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IST The Company with Passion

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Konica Minolta

LHH Recruitment Solutions

MCS

Metro Benefits Incorporated

Minnesota Lawyers Mutual Insurance Company

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My favorite Sweet Shoppe

NDS Network Deposition Services

Plummer Slade, Inc. Computer Networking & IT Solutions

Proxy Legal Staffing & Search Group

SurePoint

Target Office Products, Inc.

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USI Affinity

VERITRAK

Weleski Transfer, Inc.

Wilke CPAs & Advisors

The Wilson Group

Jen Barker Worley Photography