

## Innovation and Value Leaders' Roundtable Agenda

February 28, 2023 | Via Zoom

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|--------------------|---|
| 12:00 – 12:15 p.m. | <b>Kick-Off Meeting</b>   |
| 12:15 – 1:15 p.m.  | <b>The Next Wave in Legal A. I. – The Latest About GPT / LLMs / Generative AI / NLP</b><br><br><i>Speaker: <a href="#">Daniel Katz, J.D., Ph.D.</a>, Professor of Law, Illinois Tech – Chicago Kent Law</i>   |
| 1:15 – 1:30 p.m.   | <b>Break</b>  |
| 1:30 – 3:00 p.m.   | <b>Overcoming Cultural and Digital Transformation Challenges When Legal Professionals and Tech Evolve Simultaneously</b><br><br><i>Speaker: <a href="#">Jennifer Leonard</a>, Chief Innovation Officer and Executive Director, Future of the Profession Initiative, Penn Carey Law, Founder and CEO, Creative Lawyers</i> |
| 3:00 p.m.          | <b>Wrap-up Meeting</b>  |

## Innovation and Value Leaders' Roundtable

*Zoom Meeting – November 10, 2022*

12:00 – 12:30 p.m. ET **Introduction to Meeting – Breakouts discussing 2023 priorities**

12:30 – 1:15 p.m. ET **Developing a Lawyer Assignment / Workload Management System**

**Speakers:**

- [Evan Maynard](#), Practice Coordinator, Troutman Pepper
- Steve Peltier, Application Development Manager, Troutman Pepper

1:15 – 1:30 p.m. ET **Break**

1:30 – 2:30 p.m. ET **The Criticality of Pricing in 2023 and the Use of Agile Analytics to Help**

Fiscal 2023 will be a critical year for rate setting and pricing strategy. Most pricing teams and analytics professionals are deep at work factoring and deciding how they will approach the greater uncertainty to avoid critical pricing mistakes.

- Share how they built a flexible analytical framework in Tableau Online to provide financial reporting and risk management, extending to rate analytics.
- Demonstrate a cloud-based analytical rate dashboard (with fictional data) and describe our approach to building it.
- Discuss critical rate-setting use cases including identifying pricing gaps, spotting outliers, and pushing rate unification.

**Speakers:**

- [Mark Medice](#), Principal, LawVision
- [James Shoemaker](#), Director of Pricing & Matter Management, Miles & Stockbridge P.C.

2:30 – 3:00 p.m. ET **Breakouts or Plenary Discussion of Presentations and 2023 Plans**

## Innovation and Value Leaders' Roundtable Agenda

*Zoom Meeting –September 29, 2022*

12:00 – 1:15 p.m. ET

**(Very brief) Introduction to Meeting**

**The Design Thinking Law Firm: Innovating in a Delivery-Driven,  
Risk Averse Culture**

*Speaker: Jana Blount, Change Maker, DLA Piper UK LLP*

1:15 – 1:30 p.m. ET

**Break**

1:30 – 2:30 p.m. ET

**Innovation @ Allen & Overy**

*Speaker: Owain Worman, Global Legal Process Improvement  
Lead, Allen & Overy*

2:30 – 3:00 p.m. ET

**Followed by Roundtable discussion of speakers' presentation  
and other sharing**

## Innovation and Value Leaders' Roundtable Agenda

*Zoom Meeting – August 18, 2022*

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|-----------------------|---|
| 12:00 – 12:30 p.m. ET | <b>Introduction to Meeting</b><br><br>Breakouts on topics and projects planned for fall   |
| 12:30 – 1:30 p.m. ET  | <b>Reducing Costs, While Increasing Value</b><br><br><i>Speaker: John Burke, Global Head of Outside Counsel Management, UBS AG</i>    |
| 1:15 – 1:30 p.m. ET   | <b>Roundtable Discussion of Insights from UBS Presentation and Implication for Innovation and Value</b>                               |
| 1:30 – 1:45 p.m. ET   | <b>Break</b>  |
| 2:00 – 2:30 p.m. ET   | <b>Commentary on Recent Economic and Profit Surveys</b><br><br><i>Speakers: Mark Medice, Principal, LawVision and other panelists</i> |
| 2:30 – 3:00 p.m. ET   | <b>Roundtable Sharing (from topics suggested at beginning of meeting)</b>   |

## Innovation and Value Leaders' Roundtable Agenda

*Zoom Meeting – August 18, 2022*

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|-----------------------|---|
| 12:00 – 12:30 p.m. ET | <b>Introduction to Meeting</b><br><br>Breakouts on topics and projects planned for fall   |
| 12:30 – 1:30 p.m. ET  | <b>Reducing Costs, While Increasing Value</b><br><br><i>Speaker: John Burke, Global Head of Outside Counsel Management, UBS AG</i>    |
| 1:15 – 1:30 p.m. ET   | <b>Roundtable Discussion of Insights from UBS Presentation and Implication for Innovation and Value</b>                               |
| 1:30 – 1:45 p.m. ET   | <b>Break</b>  |
| 2:00 – 2:30 p.m. ET   | <b>Commentary on Recent Economic and Profit Surveys</b><br><br><i>Speakers: Mark Medice, Principal, LawVision and other panelists</i> |
| 2:30 – 3:00 p.m. ET   | <b>Roundtable Sharing (from topics suggested at beginning of meeting)</b>   |

## Innovation and Value Leaders' Roundtable

*Zoom Meeting – May 19, 2022*

12:00 – 12:15 p.m. ET **Introduction to Meeting**

12:15 – 1:15 p.m. ET **Overview of Blank Rome Client Innovation and Value Function**

- Structure of the function, its responsibilities, and the way it operates within the firm.
- Priorities, key opportunities and challenges that have emerged through the pandemic, including talent, resources, client demands, etc.

***Speakers: Linda Novosel, Chief Innovation and Value Officer, Blank Rome LLP and Anshoo Patel, Director of Practice Innovation, Blank Rome LLP***

1:15 – 1:30 p.m. ET **Break**

1:30 – 2:30 p.m. ET **How Clients are Changing the Outside Counsel Selection Process – Getting the Inside Scoop on Reverse Auctions and Convergence**

- Case studies on how companies are selecting counsel
- What really happens in a reverse auction
- How to best position your firm – both before and during the process

***Speakers: Jim Delkousis, Founder, PERSUIT and Chris Ochs, Head of Outside Counsel Management, Citi***

2:30 – 3:00 p.m. ET **Breakouts or Plenary Discussion of Presentations and 2022 Plans / Close Out**

## Innovation and Value Leaders' Roundtable Agenda

*Zoom Meeting – March 29, 2022*

12:00 – 12:30 p.m. ET

### **Introduction to Meeting**

#### **Hot topics for Roundtable Sharing:**

- How is war for talent affecting innovation/value priorities
- New legal tech developments

12:30 – 1:15 p.m. ET

### **Transforming Legal Service Delivery at Paul Hastings LLP**

- The innovation strategy for Practice Innovation
- How Practice Innovation is structured and the roles within the team
- Key initiatives

***Speakers: Amy Wegener, Chief Practice Innovation Officer at Paul Hastings LLP and Cathy Goodman, Lead Practice Innovation & Knowledge Counsel at Paul Hastings LLP***

1:15 – 1:30 p.m. ET

### **Break**

1:30 – 2:00 p.m. ET

### **Roundtable Sharing on Topics Suggested by Members**

2:00 – 3:00 p.m. ET

### **Lessons from Launching the World's First Tech-Focused Legal Innovation Catalyst**

***Speaker: Maya Markovich, Legal Tech / Innovation Consultant + Startup Advisor | Formerly Chief Growth Officer, Nextlaw Labs at Dentons***

***Roundtable commentators: TBD***

## Innovation and Value Leaders' Roundtable Agenda

*Zoom Meeting – January 27, 2022*

12:00 – 12:15 p.m. ET

### **Introduction to Meeting**

**Round the Room – each firm sharing a few highlights from 2021 and plans for 2022**

12:15 – 1:15 p.m. ET

### **A Client View on Innovation**

- What innovation means to clients
- Challenges to innovation between law firms and clients
- Best practices within a law firm to help become more client facing

*Speaker: Aaron Boersma | Legal Operations, Strategic Pricing and Analysis Lead, Google*

1:15 – 1:30 p.m. ET

### **Break**

1:30 – 2:30 p.m. ET

### **Case Studies on Innovation Projects – Building Client- Solutions**

- A discussion of client specific and/or client-facing technologies and other solution
- The opportunities, considerations, challenges, and lessons learned

*Speakers:*

- *Thor Alden | Legal Innovation Manager, Dechert LLP*
- *Kay Kim | Director, Practice Innovation, Simpson Thacher & Bartlett LLP*
- *James Boyer | Director of Matter Management and Efficiency, Ballard Spahr LLP*
- *Susan Sommers | Director, KM Innovation and Solutions, Ogletree, Deakins, Nash, Smoak & Stewart, P.C.*

2:00 – 3:00 p.m. ET

### **Breakouts or Plenary Discussion of Presentations and 2022 Plans / Close Out**