

## Innovation & Value Leaders' Roundtable Agenda

May 19, 2026 | 12 – 3 pm EST Via Zoom

12:00 – 12:30 p.m.	<p><b>Introductions and Discussion of Recent Conferences</b></p>
12:30 – 1:30 p.m.	<p><b>Developing an AI Competency Framework – an industry collaboration effort</b></p> <p>The Practising Law Institute (PLI) Innovation Council and the Professional Development Consortium recently partnered to develop <i>The AI-Ready Lawyer</i>, a first-of-its-kind competency framework establishing a shared standard for AI proficiency across the legal profession. Built around five pillars and 20 specific competencies across three proficiency levels, the framework is designed to serve multiple stakeholders — from law students and attorneys to law firms, legal educators, bar associations, and in-house legal departments. Representatives from PLI and the Innovation Council will join us to share how the framework was developed and how firms can apply it to training, hiring, and AI strategy. Chief Talent Officers are also welcome to attend this portion of the meeting.</p> <p><b>Speakers:</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Sharon Crane</a>, President, Practising Law Institute</li> <li>• <a href="#">Whitney Stefko Dover</a>, Director and Senior Counsel, Policy and Legal Ops+, Ford Motor Company</li> <li>• <a href="#">Kirsten Talmage</a>, Chief Strategy Officer, Practising Law Institute</li> <li>• <a href="#">Caitlin Vaughn</a>, Managing Director, Learning + Professional Development, Goodwin Procter LLP</li> </ul> <p><b>Moderator:</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Jennifer Leonard</a>, Founder, Creative Lawyers</li> </ul> <p><b>Commentary by Roundtable Members</b></p>
1:30 – 1:45 p.m.	<p><b>Break</b></p>
1:45 – 2:45 p.m.	<p><b>Disruptive Innovation in Law: What Leading Business Thinkers Would Tell Legal Leaders</b></p> <p>The legal profession knows disruption is underway, but most conversations catalogue new technologies without offering frameworks for understanding what's actually happening and why. This session draws on leading business innovation theories, including Clayton Christensen's Innovator's Dilemma, Hamilton Helmer's 7 Powers, and Baumol's cost disease, and applies them directly to the business of law. Participants will come away with new language for diagnosing disruption in legal markets, a clearer picture of why traditional law firm structures carry particular structural vulnerability, and strategic frameworks for thinking about what comes next.</p> <p><i>Group Discussion After a brief presentation, we'll open the floor for a roundtable conversation:</i></p> <ul style="list-style-type: none"> <li>• Which of these frameworks resonates most with what you're seeing at your firm right now — and which feels most foreign to how your leadership talks about change?</li> <li>• Where do you see your firm's greatest structural vulnerability? Where do you see your greatest competitive advantage?</li> <li>• What would it look like to act on one of these frameworks in the next 12 months?</li> </ul> <p><b>Facilitator:</b></p> <p><a href="#">Jennifer Leonard</a>, Founder, Creative Lawyers</p>

2:45 – 3:00 p.m.	<b>Topics for next meeting – upcoming conferences members are attending   Roundtable sharing</b>
3:00 p.m.	<b>Wrap-up Meeting</b>

## **Innovation & Value Leaders' Roundtable Agenda**

**February 26, 2026 | 12 – 3 pm EST Via Zoom**

- 12:00 – 12:30 p.m.      **Introductions and Discussion of Recent Conferences** – including key takeaways about the changing legal landscape – and thoughts on the latest TR report on the market
- 12:30 – 1:00 p.m.      **Innovation Awards and Competitions– Lessons Learned and ROI**
- Speaker:*
- [Esther Bowers](#), Chief Innovation Officer, Honigman LLP
- Commentary by Roundtable Members**
- 1:00 – 1:15 p.m.      **Break**
- 1:15 – 2:30 p.m.      **How Pricing Will Evolve in the Age of AI**
- Will A.I. finally kill the billable hour?
  - What fee structures will replace hourly rates?
  - How can firms justify clients paying for the technology, when many view it as an overhead?
  - How do firms demonstrate “value creation”?
  - How should firms determine appropriate prices when hours are no longer the core model?
- Speaker:*
- [Colin Jasper](#), Principal, Positive Pricing, Member of Professional Pricing Society, and renowned global pricing expert
- 2:30 – 3:00 p.m.      **Looking Around the Corner – Roundtable Sharing**
- Where are you seeing partners/firm leaders actively resist efficiency gains because they'd reduce billable hours, and how are you navigating that?
  - Are you seeing any early signals that AI fluency is becoming a lateral hiring differentiator? Or a retention risk?
  - Where are you seeing the biggest disconnect between what GCs say they want and what they're actually willing to pay for?
  - What's a bet another firm or organization is making that you think is smart, but your firm isn't currently making?
  - If you had to cut your innovation budget by 50%, what would survive, and what would that tell you?
- Roundtable sharing**
- 3:00 p.m.              **Wrap-up Meeting**

## **Innovation & Value Leaders' Roundtable Agenda**

**December 9, 2025 | 12 – 3 pm EST Via Zoom**

- 12:00 – 12:30 p.m.      **Introductions and Discussion of Recent Conferences** – including key takeaways about the changing legal tech landscape
- 12:30 – 1:00 p.m.      **The Journey to Win an Innovation Award**
- Speaker:*
- [Jessica Davis](#), Director, Matter Performance & Service Innovation, McCarter & English LLP
- 1:00 – 1:15 p.m.      **Break**
- 1:15 – 2:30 p.m.      **Trends in Knowledge Management and Its Support of Law Firm Use of Gen AI**
- Speaker:*
- [Oz Benamram](#), Founder, SKILLS.law and former Chief Knowledge & Innovation Officer, Simpson Thacher & Bartlett LLP
- Commentary by Roundtable Members**
- 2:30 – 3:00 p.m.      **Looking Around the Corner – Roundtable Member Discussion**
- What's next after what's next? What happens if we "solve" AI?
  - What tech seems indispensable to practice today that might be obsolete 5 years from now?
  - Without providing investment advice, what class of legal technologies would you invest in today and why?
  - Which category of incumbent tech providers are blowing it right now?
- Roundtable sharing**
- 3:00 p.m.              **Wrap-up Meeting**

## Innovation and Value Leaders' Roundtable Agenda

### September 11, 2025 | 12 – 3 pm EST Via Zoom

- 12:00 p.m. to 12:15 p.m.      **Introductions and Discussion of Recent Conferences** (Legal Tech Talk, ILTA, Running Legal like a Business, and more) – including key takeaways about the changing legal tech landscape
- 12:15 p.m. to 1:15 p.m. EST      **How Gen AI is Transforming Legal Departments and Legal Ops – plus “Prompting AI Like a Pro”**
- AI is transforming legal ops, but getting the right answers starts with asking the right questions. In this session, the speakers will explore how AI is being utilized in legal departments, how they are refining the art of crafting effective AI prompts, and what they like and dislike about the AI tools they have personally tested.
- Speakers:**
- [Connie Brenton](#), Founder and CEO, LegalOps.com
  - [Jessica Vander Ploeg](#), Vice President of Legal Operations, Belron
- 1:15 to 1:30 p.m.      **Break**
- 1:30 p.m. to 2:15 p.m.      **Generative AI Restrictions in Outside Counsel Guidelines and Gen AI – What clients say vs. what clients want**
- Speaker:**
- [Connie Brenton](#), Founder and CEO, LegalOps.com
- 2:15 to 3:00 p.m.      **Looking around the Corner - Roundtable Sharing**
- What's next after what's next? What happens if we “solve” AI?
  - What tech seems indispensable to practice today that might be obsolete 5 years from now?
  - Without providing investment advice, what class of legal technologies would you invest in today and why?
  - Which category of incumbent tech providers are blowing it right now?
- 3:00 p.m.      **Wrap-up Meeting**

## Innovation and Value Leaders' Roundtable Agenda

May 20, 2025 | 12 – 3 pm EST Via Zoom

12:00 p.m. to 1:00  
p.m. EST

### **In-House Perspective on Law Firm Innovation**

Hear a client's view of law firm efforts around Gen AI, new business models and more is changing.

**Speaker:** [Kimberly Williams](#), Executive Director and Head of Legal Ops SMBC Americas Division; former Director, Global Legal Solutions, Citi

1:00 – 1:30 p.m.

### **Roundtable Discussion – Facilitated by Jen and Susan**

- Insights and takeaways from Legal Week
- Reactions to The Lawyer Innovation Map
- What are 2025 projects and challenges?
- What's on the horizon beyond Gen AI?
- Lessons learned from past few years of law firm "innovation"
- Challenges persuading firms to invest in innovation
- Managing expectations for innovation

1:30 p.m. to 1:45  
p.m.

### **Break**

1:45– 3:00 p.m.

### **Practical Strategies for Increasing Lawyer Adoption of Your Projects**

In this session, Julia Montgomery, a recognized expert on fostering lawyer adoption of technology, will share practical strategies to help overcome the unique challenges of innovation and tech adoption in law firms. Julia will share research-based insights into the unique behavioral traits of lawyers that can present barriers to effective adoption of technology, innovation, and KM initiatives. Marrying these insights with change management best practices, she'll explore real-world, practically applicable tools and approaches to overcome resistance and foster adoption of the initiatives you're leading in your firm environment. During an open discussion session following the presentation, participants will have the chance to share their own challenges and ask Julia and one another for strategic approaches that get real results.

**Speaker:** [Julia Montgomery](#), Director of Practice Enablement, King & Spalding LLP

3:00 p.m.

### **Wrap-up Meeting**

## Innovation and Value Leaders' Roundtable Agenda

### January 23, 2025 | 12 – 3 pm EST Via Zoom

12:00 – 1:15 p.m.      **VoxPopAI** - Learning's from Ashurst's exploration and implementation of GenAI

**Description:** In this session, Sarah Chambers, Director of Digital Experience at global law firm Ashurst, will share some of the findings from the firm's GenAI trials and subsequent [VoxPopulAI report](#) as well as insights into use cases and learnings from the firm's global roll-out of Harvey.

**Speaker:**

[Sarah Chambers](#) is Director of Digital Experience, Ashurst. She heads up the firm's strategic digital R&D team whose aim is to make digital capabilities and experience a key differentiator for Ashurst's clients and people. Sarah previously practiced as a regulatory lawyer but has spent the past 15 years of her career in the legal profession designing, leading and delivering innovation and digital change in law firms through productization and user-centered research and design.

1:15 – 1:30 p.m.      **Break**

1:15 – 2:00 p.m.      **Roundtable Discussion – Facilitated by Jen and Susan**

- What are 2025 projects and challenges?
- What's on the horizon beyond Gen AI?
- Lessons learned from past few years of law firm "innovation"
- Client views on innovation
- Growth of innovation teams – what roles and experiences are firms adding
- Challenges persuading firms to invest in innovation
- Managing expectations for innovation

2:00 – 3:00 p.m.      **Applications of AI**

- Timekeeping applications – short presentation by Alma Asay, Crowell about Laurel
- Others TBA

**Roundtable sharing**

3:00 p.m.              **Wrap-up Meeting**

## **Innovation and Value Leaders' Roundtable Agenda** **November 13, 2024 | Via Zoom**

12:00 – 12:15 p.m.      **Introductions of Members / Announcements**

12:15 – 2:00 p.m.      **The Rules of Persuasion: Understanding and Mastering Persuasive Communications**

Mastering the skill of persuasion can help you increase your effectiveness and make you a better speaker, negotiator, collaborator, and leader. This session teaches that persuasion is not a “soft skill” as is commonly believed; rather, persuasion is more like chemistry: it works in specific ways following rules that you can master with the right guidance and practice. Participants will learn what makes persuasion work in all forms of human communication and how that knowledge can make them better speakers, negotiators, collaborators, and leaders. Our speaker will outline the “rules” that make persuasion work and how to make them work for you. This will be a combination of lecture and small group/breakout discussion to discuss applications of the rules.

**Speaker:**

- [Carlos Alvarenga](#), researcher, coach, and author of *The Rules of Persuasion*

**Roundtable sharing / Q&A with speaker – How do we use the “chemistry” formula for persuasion to get buy in for innovation initiatives?**

**Sample “persuasion pitch” practice with your colleagues**

2:00 – 2:15 p.m.      **Break**

2:15 – 3:00 p.m.      **Roundtable Discussion – Facilitated by Jen and Susan**

- What are 2025 projects and challenges?
- What’s on the horizon beyond Gen AI?
- Lessons learned from past few years of law firm “innovation”
- Client views on innovation

3:00 p.m.              **Wrap-up Meeting**

## Innovation and Value Leaders' Roundtable Agenda

### September 9, 2024 | Via Zoom

12:00 – 12:15 p.m.      **Introductions of Members / Announcements**

12:15 – 1:30 p.m.      **Understanding Change Management: The Science of Change**

Innovation leaders are actively involved in change management of various types within their firm. This session will help you understand the latest research on change, the factors affecting change and how you can navigate in light of those.

1. Human nature, including human hardwiring and how the Survive and Thrive channels impact whether we embrace or resist change
2. The design and limitations of the modern organization
3. Proven strategies and principles for leading change

**Speaker:** [Leslie Zernick](#), Principal, Kotter Consulting

**Roundtable sharing / Q&A with speaker**

1:30 – 1:45 p.m.      **Break**

1:45 – 3:00 p.m.      **Architects of Change: The Complex Role of the Chief Innovation Officer**

Key topics will include:

- defining innovation,
- the scope of the Chief Innovation Officer role,
- the Chief Innovator Officer's role in client engagement,
- the impact of AI (particularly generative AI),
- change leadership, and
- the differences between entrepreneurship and intrapreneurship.

**Speakers:**

- [Alma Asay](#), Chief Innovation and Value Officer, Crowel & Moring LLP
- [David Cunningham](#), Chief Innovation Officer, Reed Smith, LLP
- [Jennifer Leonard](#), Founder, Creative Lawyers; Adjunct Faculty, Penn Carey Law School; former Chief Innovation Officer for Penn Carey Law School Future of the Profession Initiative
- [Iлона Logvinova](#), Director of Practice Innovation, Cleary Gottlieb Steen & Hamilton LLP

3:00 p.m.      **Wrap-up Meeting**

## Innovation and Value Leaders' Roundtable Agenda

April 30, 2024 | Via Zoom

12:00 – 12:10 p.m.    **Introductions of Members/Announcements**

12:10 – 1:15 p.m.    **Re-Wiring for the Future: Leading Transformational Change in Historically Successful Organizations**

Success can sometimes be at odds with innovation. Join the Honorable Bridget McCormack, President and CEO of the American Arbitration Association, and Co-leader of our Innovation and Value Leaders Roundtable, Jen Leonard as they explore how leaders of established and high-performing organizations can sustain core services while creating a roadmap for the future.

The speakers will offer an overview of preeminent research on effective innovation and digital transformation efforts. They'll then discuss how these principles might falter when they collide with human psychology and organizational dynamics--especially in firms with a proven track record--and how leaders can respond.

The session will touch on topics like overcoming fear and loss aversion, harmonizing core values with the rapid pace of technological advancements, and the importance of establishing new ways to embrace emerging and undiscovered markets.

The presentation will highlight a real-time case study from the American Arbitration Association and describe how a highly successful organization is strengthening its core services while adapting to an era of transformative technology.

The speakers will share their thoughts on the support law firm leaders need to steer their organizations during this complex era.

Throughout, the discussion will emphasize the role of visionary leadership—how to inspire and support others through change, excitement, and doubt, shaping a future that's both innovative and aligned with the firm's enduring principles.

**Speakers:**

- **Jennifer Leonard**, Founder, Creative Lawyers; Adjunct Faculty, Penn Carey Law School; former Chief Innovation Officer for Penn Carey Law School Future of the Profession Initiative
- **Bridget McCormack**, President and CEO, American Arbitration Association and former Chief Justice, Michigan Supreme Court

1:15 – 1:30 p.m.    **Break**

1:30 – 2:45 p.m.

## **Forming the Law Firm Associate of the Future: A Roadmap for Law Firm Professional Development Innovation**

During this era of unprecedented convergence of factors driving change in law firms—generative technologies, hybrid work environments, intergenerational teams, elevated client expectations, and divergent career pathways—how can law firms design new programming that supports and retains their newest attorneys while contributing value to the firm and its clients? Join us to hear from three legal education and lawyer formation experts as they explore how the changing landscape impacts associate skill development and offer concrete approaches firms can use to adapt programming.

This session will explore what a comprehensive training program for the future should include, focusing on topics like:

1. AI-literacy and legal tech workshops.
2. Adaptability, resilience, prospection, and creativity as key skill sets for innovation.
3. A hybrid work mastery series.
4. Cultivating an entrepreneurial mindset.
5. Applying design thinking for enhanced client services.
6. Intergenerational collaboration programming.

Participants will leave the presentation equipped with new ideas and actionable strategies for their firms to organize and structure programs within which associates can continue to develop as the world around them continues to shape-shift.

### **Speakers:**

- **Alice Armitage**, Professor & Director of Applied Innovation and Chief Executive Professor at LexLab, University of California, College of Law, San Francisco
- **Heidi Brown**, Professor and Associate Dean for Upper-Level Writing, New York Law School, Author, *The Flourishing Lawyer*
- **Jennifer Leonard**, Founder, Creative Lawyers; Adjunct Faculty, Penn Carey Law School; former Chief Innovation Officer for Penn Carey Law School Future of the Profession Initiative

2:45 – 3:00 p.m.

## **Roundtable Sharing – priority projects for 2024, who’s doing what pilots with which AI tools and other topics of interest**

3:00 p.m.

## **Wrap-up Meeting**

## Innovation and Value Leaders' Roundtable Agenda

February 5, 2024 | Via Zoom

12:00 – 12:15 p.m. **Introductions of Members / Announcements**

12:15 – 1:15 p.m. **Update on the MIT Law Task Force on AI and Frameworks for Evaluating and Supervising AI**

This session will explore key insights and emerging trends shaping the future of the legal profession. Here's what you'll gain from this session:

1. **Coast-to-Coast Learnings:** Discover valuable lessons from thousands of virtual and in-person conversations with legal professionals across the nation. Understand how these interactions are shaping the future of legal practice and client engagement.
2. **Update on law.MIT's AI Task Force:** Get the latest developments from the law.MIT Task Force on generative AI. Learn about their groundbreaking work and how it's influencing legal frameworks and practices.
3. **Generative AI in Law:** Engage with the call for submissions for the Generative AI Collection for the law.MIT Computational Law Report. Understand the significance of this initiative and how you can contribute to this evolving field.
4. **Risk Continuum Framework:** Gain insights into the 'Risk Continuum' tool designed to facilitate productive conversations around AI in law. Learn how to navigate the complexities and ethical considerations of AI integration in legal practices.
5. **Leadership in Action:** Explore the 'Supervising AI Framework' and its implications for legal leadership. Understand the skills and strategies needed to effectively oversee AI tools and ensure they align with legal standards and ethics.

**Speaker: Olga V. Mack, Fellow at CodeX, The Stanford Center for Legal Informatics, and Generative AI Editor at law.MIT Computational Law Report**

1:15 – 1:30 p.m. **Break**

1:30 – 2:30 p.m. **Gamechanger: How Generative AI is Creating New Rules for the Legal Ecosystem**

In 2023, ChatGPT caught everyone's attention, and for good reason. From both a technical and cultural adoption perspective, Generative AI represents a paradigm shift from legacy AI. The AI revolution is already creating ripple effects throughout every sector of the economy, including legal services. In this interactive session, Zach Abramowitz will present the evidence that GenAI is indeed a watershed moment. He will then share his perspective as an investor and a strategic consultant on how this shift has impacted legal service providers and the legal technology landscape.

**Speaker: Zach Abramowitz, Founder, Killer Whale Strategies/Legal Tech Investor**

2:30 – 3:00 p.m. **Roundtable Sharing – priority projects for 2024, who's doing what pilots with which AI tools, and other topics of interest**

3:00 p.m. **Wrap-up Meeting**

## Innovation and Value Leaders' Roundtable Agenda

November 2, 2023 | Via Zoom

- 12:00 – 12:05 p.m.    **Introductions of Members/Announcements**
- 12:05 – 1:30 p.m.    **GenAI, GPT, LLMs, and the Legal Data-Driven Revolution**
- How GenAI is changing the practice of law
  - How in-house counsel are using AI and how expectations of outside counsel are changing
- Speaker: Damien Riehl**, Vice President, Solutions Champion, vLex; and Leadership Team, SALI – litigator, coder, and AI builder
- 1:30 – 1:45 p.m.    **Break**
- 1:45 – 2:30 p.m.    **Update on the MIT Law Task Force on AI and Frameworks for Evaluating and Supervising AI**
- Speaker: Olga Mack**, Vice President and CEO of CounselLink CLM
- 2:30 – 3:00 p.m.    **Roundtable Sharing – who's doing what pilots with which AI tools**
- 3:00 p.m.    **Wrap-up Meeting**

## Innovation and Value Leaders' Roundtable Agenda

June 8, 2023 | Via Zoom

12:00 – 12:15 p.m. **Kick-Off Meeting**

12:15 – 1:15 p.m. **Move from Thinking/Talking to Doing | Tech Adoption and AI – An interactive workshop**

**Speaker:** [Gabriel Teninbaum](#). Assistant Dean of Innovation, Strategic Initiatives, & Distance Education & Professor of Legal Writing, Suffolk University Law School

1:15 – 1:30 p.m. **Break**

1:30 – 3:00 p.m. **The Challenges of Leading Innovation in Law Firms around AI – But Not Being Left Behind – A roundtable discussion of members with panelists around ethics, compliance, equity, competition and more**

**Panelists:**

- [Phaedra Boinodiris](#), Global Leader for Responsible AI, IBM Consulting
- [Rachel Dooley](#), Chief Innovation Officer, Goodwin Procter LLP
- [Gabriel Teninbaum](#), Assistant Dean of Innovation, Strategic Initiatives, & Distance Education & Professor of Legal Writing, Suffolk University Law School

3:00 p.m. **Wrap-up Meeting**

## 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*

12:00 – 12:30 p.m. ET

### **Introduction to Meeting**

Breakouts on topics and projects planned for fall

12:30 – 1:30 p.m. ET

### **Reducing Costs, While Increasing Value**

*Speaker: John Burke, Global Head of Outside Counsel Management, UBS AG*

1:15 – 1:30 p.m. ET

### **Roundtable Discussion of Insights from UBS Presentation and Implication for Innovation and Value**

1:30 – 1:45 p.m. ET

### **Break**

2:00 – 2:30 p.m. ET

### **Commentary on Recent Economic and Profit Surveys**

*Speakers: Mark Medice, Principal, LawVision and other panelists*

2:30 – 3:00 p.m. ET

### **Roundtable Sharing (from topics suggested at beginning of meeting)**

## Innovation and Value Leaders' Roundtable Agenda

*Zoom Meeting – August 18, 2022*

- |                       |   |
|-----------------------|---|
| 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**

## Innovation and Value Leaders' Roundtable Agenda

*Zoom Meeting – August 18, 2022*

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

## 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**