



Virtual Sessions September – October 2020



Session 1: Introductions, Industry Trends + Networking

Thursday, September 10 | 4:00 p.m. CT

TIME	SESSION
4:00 p.m.– 4:30 p.m. CT	<p>INTRODUCTION + INDUSTRY TRENDS</p> <p>Opening Remarks Kevin Clem, Chief Commercial Officer, HBR Consulting</p> <p>Industry Trends Briefing</p> <ul style="list-style-type: none">• Discussion/inventory of what transpired since Legal Lab 2019• Projections based on historical data• Opportunities to accelerate evolution toward law department and law firm of the future <p>SPEAKERS Bobbi Basile, Managing Director, HBR Consulting Lauren Chung, Managing Director, HBR Consulting</p>
4:30 p.m.– 5:00 p.m. CT	<p>BEER TASTING + NETWORKING</p> <p>Beer Tasting Beers by Woods Boss Brewing Company, Denver, CO</p>
5:00 p.m.– 5:30 p.m. CT	<p>Networking in Breakout Groups</p>

Session 2: Talent

Thursday, September 17 | 1:00 p.m. CT

TIME	SESSION
1:00 p.m.– 1:30 p.m. CT	<p>IDEA XCHANGE + INTERACTIVE DISCUSSION</p> <p>Tackling Implicit Bias</p> <p>Tamara Morgan, Senior Counsel / Strategic Leader of Equity Inclusion & Diversity, Litigation Legal Department, Kaiser Foundation Hospitals / Health Plan</p>
1:30 p.m.– 2:30 p.m. CT	<p>FACILITATED DISCUSSION</p> <p>Developing the Lawyer of the Future</p> <p>The practice of law was evolving even before the pandemic, along with the skill sets lawyers need to be successful in law departments and law firms. The changing work environment has accelerated that evolution. Lawyers must be more agile than ever—able to take on new challenges as required and adaptive to change as the profession continues to evolve. They must be willing and able to acquire new skills, including increasingly important facility with technology. This discussion will explore how law departments, law firms and law schools can collaborate to ensure that new and experienced lawyers are equipped to handle these challenges.</p> <p>FACILITATORS</p> <p>Lauren Chung, Managing Director, HBR Consulting</p> <p>Adrian Davis, Chief Attorney Development and Knowledge Officer, Latham & Watkins LLP</p> <p>Phyllis P. Harris, General Counsel and Chief Ethics and Compliance Officer, American Red Cross</p> <p>Martin Katz, Chief Innovation Officer and Executive Director of Project X-ITE, University of Denver</p>



Session 3: Service Delivery

Thursday, September 24 | 1:00 p.m. CT

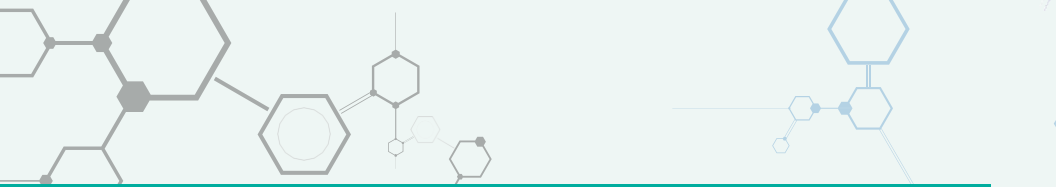
TIME	SESSION
1:00 p.m.– 1:30 p.m. CT	<p>IDEA XCHANGE + INTERACTIVE DISCUSSION</p> <p>Reimagining the Legal Workplace</p> <p>Mariana Loose, Chief Marketing Officer, Jackson Lewis</p>
1:30 p.m.– 2:30 p.m. CT	<p>FACILITATED DISCUSSION</p> <p>Evolving Legal Service Delivery in a Changing World</p> <p>The pandemic and its economic repercussions have accelerated the need for changes that legal organizations had been contemplating, emphasizing their urgency and value in the uninterrupted delivery of high-quality legal services. Organizations that had previously invested in initiatives such as digital transformation, mobility and collaboration platforms and had agile, proactive teams were much better prepared to deal with the sudden transition than those that had not made those investments. What new client needs are emerging, and how can legal organizations collaborate to meet those needs? How are forward-thinking law firms using this opportunity to differentiate their delivery of legal services and forge stronger bonds with clients? This discussion will focus on ways to leverage what we have learned to better position law departments and law firms to emerge strong and continue their evolution toward law departments and law firms of the future.</p> <p>FACILITATORS</p> <p>Bobbi Basile, Managing Director, HBR Consulting</p> <p>Nolan W. Kurtz, Chief Operating Officer, Buchanan Ingersoll & Rooney</p> <p>Léo Murgel, Vice President, Legal and Corporate Affairs Chief Operating Officer, Salesforce</p> <p>Mark Usellis, Chief Strategy Officer, Davis Wright Tremaine LLP</p>



Session 4: Technology

Thursday, October 8 | 2:00 p.m. CT

TIME	SESSION
2:00 p.m.– 2:30 p.m. CT	<p>IDEA XCHANGE + INTERACTIVE DISCUSSION</p> <p>Unlocking the Power of Data and AI</p> <p>Kiran Mallavarapu, Senior Vice President for Legal Strategic Services, Liberty Mutual Group</p>
2:30 p.m.– 3:00 p.m. CT	<p>IDEA XCHANGE + INTERACTIVE DISCUSSION</p> <p>Designing, Building, and Selling Online Legal Products: Lessons Learned</p> <p>Chris Boyd, Chief Operating Officer, Wilson Sonsini Goodrich & Rosati</p>
3:00 p.m.– 3:30 p.m. CT	<p>IDEA XCHANGE + INTERACTIVE DISCUSSION</p> <p>Countering COVID through Digital Transformation: Legal Ops 3.0</p> <p>Connie Brenton, Chief of Staff and Senior Director of Legal Operations, NetApp Inc.</p> <p>Justin Hectus, Chief Information Officer/Chief Information Security Officer, Keesal, Young & Logan</p>



Session 5: Workshop

Thursday, October 15 | 12:00 p.m. CT

TIME	SESSION
12:00 p.m.– 1:45 p.m. CT	<p>WORKSHOP</p> <p>Smart Collaboration: Driving Strategic Results Through Personal Strengths</p> <p>In-house law departments and law firms can generate more strategic, innovative, value-added solutions when they work across organizational silos—what we call “smart collaboration.” By teaming up across functions, business areas, geographies and organizations, lawyers can bring specialized legal knowledge to bear on real-life challenges, in ways that not only limit risks but also help the organization create distinctive advantages and capitalize on them. Our empirical research further shows that Smart Collaboration leads to higher individual and group productivity, faster and better-implemented innovation, and an ability to engage and retain top talent.</p> <p>Nevertheless, attempting to collaborate across long-established boundaries can be messy, risky and costly—especially for time-pressed lawyers. Drawing on our case studies and research, including the just-released book <i>Smart Collaboration for In-House Legal Teams</i>, we will discuss concrete actions to overcome organizational and cultural barriers to reap the benefits of smart collaboration. One core focus area will be specific tactics for law departments and law firms to improve their collaboration and related outcomes.</p> <p>We will use the newly released <i>Smart Collaboration Accelerator</i> to customize the session. Each participant will get personalized insights into their own collaboration-related behavioral tendencies, and concrete advice on how to use their strengths to promote more effective (virtual) collaboration.</p> <p>FACILITATOR</p> <p>Heidi K. Gardner, PhD, Distinguished Fellow, Center on the Legal Profession, and Faculty Chair, Accelerated Leadership Program and Sector Leadership Masterclass, Harvard Law School</p>
1:45 p.m.– 2:00 p.m. CT	<p>Closing Remarks</p> <p>Kevin Clem, Chief Commercial Officer, HBR Consulting</p>

Speakers + Facilitators



Bobbi Basile
Managing Director
HBR Consulting

Bobbi serves as a managing director in the Legal Transformation + Innovation practice within the Advisory Business at HBR Consulting (HBR). Bobbi has 30 years of experience in the legal industry delivering strategic, operations and technology services to Fortune 500 legal departments and law firms. She is at the forefront of evaluating and applying innovative approaches to the practice of law with a specific emphasis on AI-enabled and transformative technologies. Bobbi has a unique combination of expertise in developing strategies aligned to business objectives, transforming the practice of law, evolving electronic discovery and developing leading practices.

At HBR, she leads a growing team of professionals bringing fresh thinking to a new era of legal business challenges. She assists law firms and law departments by providing strategic and operational guidance to optimize service delivery, strategy and operations and effective selection and application of transformative technologies. Bobbi and her team bring a business-focused discipline to assist with the development of strategic business plans to achieve the desired performance goals with a focus on value and maximizing revenue.

Prior to joining HBR, she was the Director of Consulting and Analytics at RenewData and an Executive Director with Ernst & Young's Forensic Technology Discovery Services. She was awarded the prestigious Consultant of Year Award in 2017 from the International Legal Technology Associations (ILTA).



Chris Boyd
Chief Operating Officer
Wilson Sonsini Goodrich & Rosati

Chris Boyd is the chief operating officer at Wilson Sonsini Goodrich & Rosati, where he oversees the teams responsible for attorney recruiting; diversity and inclusion; human resources; knowledge management; marketing and business development; practice management; professional development; research services; and work



allocation programs. He also focuses on ensuring these functions are aligned internally and effectively support the business plans of the firm, its departments, and practice groups.

Chris previously was a corporate and securities associate at Wilson Sonsini, representing technology and life science companies. In this role, he handled numerous initial public offerings, venture financings, and acquisitions for his clients. Chris left the practice of law in 1997 and led knowledge management programs at several companies before returning to the firm in 2001.

Following graduation from law school, Chris served as a law clerk for the Honorable Melvin Brunetti of the U.S. Court of Appeals for the Ninth Circuit. Prior to law school, Chris worked as a management consultant.



Connie Brenton
Chief of Staff and Senior Director of Legal Operations
NetApp Inc.

As Chief of Staff and Sr. Director of Legal Operations at NetApp Inc., Connie Brenton has leveraged her legal and business background to create an innovative and best in class legal department that has been recognized internationally for its innovation in the areas of strategic vision, technology adoption, new staffing/sourcing solutions, partner and financial management and building efficiencies by driving world class operating metrics.

Prior to NetApp, Connie served as Senior Director, Deputy General Counsel at Sun Microsystems and Managing Counsel at Oracle where she also initiated the Legal Operations role. Before joining the Legal Operations community, Connie was in private practice as a civil litigator.

Connie has been active in developing and promoting the Legal Operations role throughout the business and legal communities. She is former CEO and Chairman of the Board of the Corporate Legal Operations Consortium (CLOC), the world's largest, fastest growing and most active international group of legal operations professionals, growing its membership from 40 to 1800 in less than three years. She publishes on the topics of the changing legal ecosystem and legal operations and speaks internationally on the topic of "Running Legal like a Business."



Connie holds a JD, an MBA and a BA in Economics. She was named as one of Corporate Counsel's National Women in Law in 2018, honored as one of the 100 Women of Influence in Silicon Valley for 2014 and was selected as one of the top 10 Deputy General Counsel in 2012.



Lauren Chung
Managing Director
HBR Consulting

Lauren serves as a managing director and leads the Strategy + Operations practice within the Advisory business at HBR Consulting (HBR). She has over 20 years of management consulting experience and works with law department and law firm leadership on strategic, process and operational improvement initiatives. Clients value Lauren's expertise in assisting law departments and law firms to drive transformational efforts that achieve organizational and operational efficiency through the alignment of people, process and technology.

Lauren has been leading the HBR Law Department Survey, a leading source of benchmarking data for law departments since its inception. Recognized as a thought leader, Lauren publishes and speaks regularly to industry groups on law department and law firm management best practices.

Prior to joining HBR, Lauren was a management consultant in corporate strategy at PwC. Outside of work, Lauren and her husband are proud parents of four children. She is also actively involved in community initiatives focused on helping children and youth.



Kevin Clem
Chief Commercial Officer
HBR Consulting

Kevin serves as the chief commercial officer at HBR Consulting (HBR). Kevin works with HBR's leadership to maximize the value of the client experience, develop new client relationships and fuel HBR's business growth. With over 20 years of consulting experience, he has served as a trusted advisor to law departments and law firms,

focusing on improving operational efficiency and optimizing legal operations. He is a frequent speaker at industry conferences and events and oversees HBR's thought leadership across the legal industry.

Prior to joining HBR, Kevin was a managing director and founding member of Huron Consulting Group and a senior consultant with Arthur Andersen. Kevin holds an MBA from New York University with a specialization in organizational change management and the intersection of law and business, and a bachelor's degree in international business from Pepperdine University.

Kevin spent the first 16 years of his life attending American schools overseas; with time in The Netherlands, Singapore and Scotland. Outside of work, he now spends his free time and frequent flyer miles instilling that love of travel and global cultures galloping the globe with his wife and three young children.



Adrian Davis
Chief Attorney Development and Knowledge Officer
Latham & Watkins LLP

Adrian leads the administrative departments of Latham responsible for attorney recruiting, training and development, and diversity and inclusion, as well as the firm's knowledge management, research and library, and litigation services groups. Following graduation from the New York University School of Law in 2001, Adrian joined Latham's San Francisco office as a litigation associate. He practiced litigation for seven years, primarily in the areas of antitrust and securities litigation, and also was extensively involved in Latham's pro bono program.



Heidi K. Gardner, PhD
Distinguished Fellow, Center on the Legal Profession, and Faculty Chair, Accelerated Leadership Program and Sector Leadership Masterclass
Harvard Law School

Heidi K. Gardner, PhD, is a Distinguished Fellow at Harvard Law School's Center on the Legal Profession and Faculty Chair of the school's Accelerated Leadership Program and Sector Leadership Masterclass. Previously she was a professor at



Harvard Business School. Dr. Gardner's book *Smart Collaboration: How Professionals and Their Firms Succeed by Breaking Down Silos* was published in 2017 by Harvard Business Press and became a Washington Post bestseller. Named by Thinkers 50 as a Next Generation Business Guru, Dr. Gardner recently co-founded the research and advisory firm Gardner & Co.

Dr. Gardner has authored more than 70 books, chapters, case studies, and articles. Her research received the Academy of Management's prize for Outstanding Practical Implications for Management and has been selected three times for Harvard Business Review's "best of" collections. The 2nd edition of her book *Leadership for Lawyers: Essential Strategies for Law Firm Success* was published in 2019, and *Smart Collaboration for Lateral Hiring* was released in 2018. Her latest work, *Smart Collaboration for In-House Legal Teams*, is forthcoming in 2020.

Dr. Gardner has lived and worked on four continents, including as a Fulbright Fellow, and for McKinsey & Co. and Procter & Gamble. She earned her BA in Japanese from the University of Pennsylvania (summa cum laude; Phi Beta Kappa), a Masters degree from the London School of Economics (with distinction), and second Masters and PhD from London Business School.



Phyllis P. Harris

General Counsel and Chief Ethics and Compliance Officer
American Red Cross

Phyllis P. Harris is the General Counsel and Chief Ethics and Compliance Officer for the American Red Cross. Phyllis leads a team of attorneys and legal professionals who support the business units of the American Red Cross in providing emergency assistance; disaster relief and preparedness; and a safe blood supply. Phyllis reports directly to the CEO where she is a member of the executive leadership team.

Prior to joining the American Red Cross in March 2018, Phyllis spent thirteen years at Walmart Inc., where over the course of her tenure, she served as Senior Vice President and General Counsel for Legal Operations, Senior Vice President and Chief Compliance Officer for Walmart US and Vice President for Environmental Compliance. Prior to Walmart, Phyllis worked at the United States Environmental Protection Agency where she served as Deputy Assistant Administrator for Enforcement and Compliance and Regional Counsel in Atlanta, GA. In 2001, Phyllis

was awarded the Meritorious Rank Award by President George W. Bush. Phyllis was the 2016 recipient of the Diversity Journal's Women Worth Watching Award and 2018 list of Most Influential African American Corporate Counsel by Savoy Magazine. Phyllis serves as the Chairman of the Converse College Board of Trustees and Board Director for the Council on Legal Education Opportunity.



Justin Hectus

Chief Information Officer / Chief Information Security Officer
Keesal, Young & Logan

Justin Hectus is the Chief Information Officer (CIO) and Chief Information Security Officer (CISO) of Keesal, Young & Logan (KYL), where he leads the firm's strategic technology vision. His core focus in this dual role is managing risk and maximizing opportunities for the firm and its clients.

As a member of KYL's Privacy and Data Security practice groups, Justin has managed investigations, data protection impact assessments, privacy impact assessments, resiliency initiatives and development of policy, procedure, and training for clients in the Technology, Banking and Healthcare sectors.

Justin is a three-time ILTA Distinguished Peer Award winner and a Commissioner for Technology & Innovation for the City of Long Beach. He is also the CIO of KP Labs, a technology company focused on business process automation and a member of NetApp's TAP SWAT Team.



Martin Katz

Chief Innovation Officer and Executive Director of Project X-ITE
University of Denver

Marty Katz is the Chief Innovation Officer for the University of Denver, where he builds cross-disciplinary experiential education, online education capacity, and unbundled stackable education modules, while breaking down silos and barriers to collaboration in higher education. He is also the Executive Director of Project X-ITE, a cross-disciplinary platform to ignite the innovator's mindset among students and connect DU to Denver's innovation ecosystem.



Prior to that, he served as Dean at the University of Denver, Sturm College of Law, where he is also a faculty member. As Dean for seven years, he led Denver Law in the development and implementation of a major strategic plan focused on experiential learning, building core areas of specialization, and connecting with Denver's legal community. As a result, Denver Law became a national leader in experiential education and doubled its faculty's scholarly productivity. Under Dean Katz's leadership, Denver Law moved up 21 places in US News' law school rankings, had five specialty programs ranked in the Top 15 by US News, and received recognition as one of America's 20 Most Innovative Law Schools.

He has published extensively on the future of legal education, as well as in the fields of constitutional law and employment law. He has lectured extensively on these topics and has made numerous media appearances in both local and national outlets. The National Jurist selected him as #4 on their "Most Influential People in Legal Education" list.

Prior to teaching full time, Professor Katz was a partner in the employment law group at Davis, Graham & Stubbs in Denver, Colorado and a law clerk to the Honorable David M. Ebel of the U.S. Court of Appeals. In his spare time, Professor Katz flies search and rescue missions for the Civil Air Patrol.



Nolan W. Kurtz
Chief Operating Officer
Buchanan Ingersoll & Rooney

Nolan W. Kurtz is Buchanan's Chief Operating Officer, overseeing business operations and collaborating with leadership in driving maximum performance, innovation and service excellence. With a role that spans both administrative and legal functions, Nolan is keenly focused on leading initiatives responsive to evolving client demands and competitive pressures in the legal sector. He prioritizes recruiting and developing future-forward talent, and creating processes and solutions that maximize the power of data, predictive analytics and performance metrics.

Previous to his work with Buchanan, Nolan provided government relations counsel focused on information technology procurement. In 2005, he was recognized by PoliticsPA as one of Pennsylvania's "Most Effective Lobbyists Under the Age of 40."

Nolan honed his skills merging evolving technology with traditional service delivery in his role as Deputy Secretary for Administration for the Pennsylvania Department of State. There, he directed electronic government initiatives in the areas of business registration, professional licensure, voter registration, campaign finance and on-line voting. At the time, Governor Ridge appointed Nolan to chair Pennsylvania Open for Business which streamlined online business registration.



Mariana Loose
Chief Marketing Officer
Jackson Lewis

Mariana Loose is the Chief Marketing Officer of Jackson Lewis P.C. where she is responsible for the firm's day-to-day marketing and business development function. Prior to joining Jackson Lewis, Mariana served as the Director of Marketing & Business Development at Fried Frank.

Mariana has extensive experience developing marketing and business development programs that deliver measurable results and revenue. She has launched industry and client team programs; advises firms on client and media communications strategies; and coaches individual partners on achieving their business development objectives. Mariana has an MBA in International Business and Marketing from Baruch College Zicklin School of Business.



Kiran Mallavarapu
Senior Vice President of Legal Strategic Services
Liberty Mutual Group

Kiran Mallavarapu is the Senior Vice President of Legal Strategic Services (LSS) for Liberty Mutual Group's Corporate Legal Department. His group is responsible for Outside Counsel relationship managements, Legal Analytics, Systems and Technology, Data Science and Artificial Intelligence, Continuous Improvement and Innovation.

Prior to this, Mr. Mallavarapu has held multiple positions in Liberty Mutual. Before joining Liberty Mutual, Kiran was a Research Engineer for Fuel Cell cars at General Motors R&D, in Rochester NY. Mr. Mallavarapu has a Bachelor's degree in Mechanical Engineering from Bangalore University, India, a Master's degree in Mechanical Engineering from Virginia Tech, and a MBA from Simon Graduate School of Business. He has also completed his CPCU, AIC, AIT, and API. On a personal note, Kiran is an Orange Theory enthusiast, enjoys cooking and traveling.



Tamara Morgan

**Senior Counsel / Strategic Leader of Equity Inclusion & Diversity,
Litigation | Legal Department**

Kaiser Foundation Hospitals / Health Plan

For over 25 years Tamara's legal practice has focused on supporting management with labor and employment issues. She started her career at a mid-sized San Francisco firm as a litigator. In 2001 she moved to Kaiser Foundation Hospitals/Health Plan, advising managers and HR on both day to day performance oversight, policy and strategy issues, and managing employment litigation (her primary focus since 2017). Tamara is a seasoned litigator and tough negotiator, known and respected for her pragmatic, collaborative, results-oriented style and strong writing skills.

A significant portion of Tamara's work is within her scope as the Kaiser Legal Department's Strategic Leader for Equity Inclusion and Diversity. Beginning in 2011 Tamara has developed and led the Department EI&D Committee, working tirelessly to promote the Program mission, "to strategically drive the integration of equity, inclusion and diversity into every aspect of our work resulting in a positive and enduring impact on our workforce/department, the legal profession and the communities we serve." The positive, measurable, and enduring impact of this work on her colleagues, the community and the pipeline of future diverse lawyers drives Tamara's passion for this aspect of her career.

Tamara is a Bay Area native and graduate of the University of California, Berkeley and Stanford Law School. Tamara's passion for equity spills over into her non-work life. She serves on the board of a local non-profit that provides respite and support services to children and families.



Léo Murgel

VP, Legal and Corporate Affairs COO
Salesforce

Léo Murgel is Salesforce Legal and Corporate Affairs (LCA) COO. In this role, Léo is accountable for enhancing the productivity of the division leveraging strategies including, Outside Counsel Management, Shared Services, Innovation Delivery, Data Science and Organization Change Management in support of Salesforce's 600+ strong Global Salesforce Legal and Corporate Affairs team. Prior to his role, Léo was a VP in IT Mergers & Acquisitions, where he was responsible for due diligence and complete IT integration of 20+ Salesforce acquisitions. Léo has also led Salesforce's IT Program Management office and held other related leadership roles across global retailers, technology consultancies, and engineering firms. He holds a bachelor's degree from UC Davis and further Executive Education from UC Berkeley.



Mark Usellis

Chief Strategy Officer
Davis Wright Tremaine LLP

Mark Usellis is Chief Strategy Officer at Davis Wright Tremaine. In that role, he helps shape and implement the firm's activities to promote long-term sustainable health. He is the staff lead on the creation and execution of the strategic plan and plays a guiding role in business development, marketing, client service, practice group management, innovation and lateral recruiting. Mark has a B.A. in Economics from Haverford College and a M.P.A. in International Trade and Finance from Harvard University. He is unable to explain how that background led to his current position.

Advisory Board



Connie Brenton
Chief of Staff and Senior Director of Legal Operations
NetApp, Inc.

As Chief of Staff and Sr. Director of Legal Operations at NetApp Inc., Connie Brenton has leveraged her legal and business background to create an innovative and best in class legal department that has been recognized internationally for its innovation in the areas of strategic vision, technology adoption, new staffing/sourcing solutions, partner and financial management and building efficiencies by driving world class operating metrics.

Prior to NetApp, Connie served as Senior Director, Deputy General Counsel at Sun Microsystems and Managing Counsel at Oracle where she also initiated the Legal Operations role. Before joining the Legal Operations community, Connie was in private practice as a civil litigator.

Connie has been active in developing and promoting the Legal Operations role throughout the business and legal communities. She is former CEO and Chairman of the Board of the Corporate Legal Operations Consortium (CLOC), the world's largest, fastest growing and most active international group of legal operations professionals, growing its membership from 40 to 1800 in less than three years. She publishes on the topics of the changing legal ecosystem and legal operations and speaks internationally on the topic of "Running Legal like a Business."

Connie holds a JD, an MBA and a BA in Economics. She was named as one of Corporate Counsel's National Women in Law in 2018, honored as one of the 100 Women of Influence in Silicon Valley for 2014 and was selected as one of the top 10 Deputy General Counsel in 2012.



Adrian Davis
Chief Attorney Development and Knowledge Officer
Latham & Watkins LLP

Adrian leads the administrative departments of Latham responsible for attorney recruiting, training and development, and diversity and inclusion, as well as the firm's knowledge management, research and library, and litigation services groups.

Following graduation from the New York University School of Law in 2001, Adrian joined Latham's San Francisco office as a litigation associate. He practiced litigation for seven years, primarily in the areas of antitrust and securities litigation, and also was extensively involved in Latham's pro bono program.



Kathryn DeBord
Chief Innovation Officer
Brian Cave Leighton Paisner

Katie DeBord is Bryan Cave Leighton Paisner's Global Chief Innovation Officer. In her role, Katie leads the firm's innovation team, which is an international cross-disciplinary team dedicated to legal service delivery innovation. She has served as the co-architect of several strategic service delivery functions that the Firm has launched, including Cantilever, the Firm's legal operations consultancy division, launched in 2016, as well as BCLP Cubed, which is the Firm's newest legal service innovation designed to help clients effectively manage their high volume work streams.

Katie oversees lawyers, technologists, and related professionals who are responsible for identifying and implementing new practice innovations, designing solutions for practice groups and clients, and serving as the leader of the Product Development team for BCLP Cubed. As part of her oversight of new product development for BCLP Cubed, Katie leads the innovation team's new product designs for clients who are challenged to manage areas of high volume legal work. The product team's solutions combine the firm's legal service delivery centers with its complex advice and its experience in process engineering, technology and data analytics to provide end-to-end solutions for BCLP Cubed's clients.

Katie also serves as an advisor to the firm's various initiatives to train its associates in legal innovation, including the firm's internationally recognized Bryan Cave Leighton Paisner Business Academy, as well as the firm's internship partnership with the Institute for the Future of Law Practice (IFLP). As part of her efforts to drive innovation in new lawyer education and training, Katie sits on the IFLP Advisory Board. Katie is a frequent speaker at various legal innovation forums, and has frequently guest lectured at the Northwestern University School of Law.

Prior to her current role, Katie was a partner in the firm's Commercial Litigation



Group and a trial attorney specializing in complex contract litigation, patent, and IP licensing matters, as well as consumer class action defense.



Paul Eberle
Chief Executive
Husch Blackwell

As a former entrepreneur and business owner, Paul understands exactly what matters to clients and has seen firsthand how great attorneys and great law firms can deliver great outcomes for clients.

Before assuming executive leadership positions in the legal industry, Paul spent 20 years hiring law firms and working closely with attorneys to achieve his own companies' ambitious goals. His experiences made him acutely aware of what it takes to solve clients' challenges.

Paul enjoys working shoulder to shoulder with Husch Blackwell attorneys. He works hard to ensure that the firm's attorneys have the resources needed to help clients advance their business goals.

Believing that careful listening is an important part of leadership, Paul is attentive to the ideas and views of the firm's attorneys, who in turn know the importance of listening to clients to better understand their problems and perspectives—and help them succeed.



Phyllis P. Harris
General Counsel and Chief Ethics and Compliance Officer
American Red Cross

Phyllis P. Harris is the General Counsel and Chief Ethics and Compliance Officer for the American Red Cross. Phyllis leads a team of attorneys and legal professionals who support the business units of the American Red Cross in providing emergency assistance; disaster relief and preparedness; and a safe blood supply. Phyllis reports directly to the CEO where she is a member of the executive leadership team.



Prior to joining the American Red Cross in March 2018, Phyllis spent thirteen years at Walmart Inc., where over the course of her tenure, she served as Senior Vice President and General Counsel for Legal Operations, Senior Vice President and Chief Compliance Officer for Walmart US and Vice President for Environmental Compliance. Prior to Walmart, Phyllis worked at the United States Environmental Protection Agency where she served as Deputy Assistant Administrator for Enforcement and Compliance and Regional Counsel in Atlanta, GA. In 2001, Phyllis was awarded the Meritorious Rank Award by President George W. Bush.

Phyllis was the 2016 recipient of the Diversity Journal's Women Worth Watching Award and 2018 list of Most Influential African American Corporate Counsel by Savoy Magazine. Phyllis serves as the Chairman of the Converse College Board of Trustees and Board Director for the Council on Legal Education Opportunity.



Nicole Morris
Professor in Practice and Director of TI:GER Program
Emory University School of Law

Nicole N. Morris is a member of the faculty at Emory University School of Law. She is a Professor in Practice and Director of the TI:GER program. TI:GER (Technological Innovation: Generating Economic Results) is an innovative partnership between Emory and Georgia Institute of Technology (Georgia Tech) that brings together graduate students in law, business, science and engineering to work on ways to take innovative ideas from the lab to the marketplace. As a Professor in Practice, her areas of expertise include patent law, patent litigation, patent prosecution, IP licensing and strategy.

Prior to joining the Emory faculty, Professor Morris was the former Managing Patent Counsel at The Coca-Cola Company in Atlanta, Georgia. While at The Coca-Cola Company, Nicole was responsible for the development and implementation of the Company's global patent strategy and providing day-to-day advice & counseling to business stakeholders, including freedom-to-operate and competitive assessments and counseling concerning IP related agreements.

Professor Morris has over fifteen years of experience practicing patent law in large and mid-sized law firms and has represented clients in patent and trademark litigation matters, as well as patent prosecution matters. Professor Morris also



worked as an engineer for six years with 3M and Eli Lilly and has over twenty-five years of experience working with consumer products and technology commercialization.

Professor Morris is a frequent speaker on patent law topics including the legal implications of technology, technology innovation strategy and patent strategy. She is also a member of the American Intellectual Property Law Association, Atlanta IP Inn of Court (Executive Committee Member), Atlanta Bar Association, Georgia Lawyers for the Arts (Board Member) and Georgia Intellectual Property Alliance (Executive Board Member). In 2013, Professor Morris was awarded the 2013 “Rising Star Corporate Counsel Award from the Atlanta Business Chronicle and featured in the August 2013 issue of Corporate Counsel magazine.

Professor Morris is licensed to practice before the United States Patent and Trademark Office and is admitted to practice in the states of Georgia, Minnesota, Massachusetts and in the District of Columbia.



Joseph Palermo
Chief Operating Officer
Lowenstein Sandler

Joe provides executive oversight of day-to-day operations and works closely with leadership to help drive the firm’s positioning and strategic plan. With responsibility for all business functions, he is focused on creating greater efficiency across finance, human resources, marketing, and technology in order to provide superior service to the partnership and the highest value to clients. He strives to embody the firm’s core values and enable its lawyers to compete and win in a dynamic legal industry.

Joe has more than 25 years of increasing management responsibility in professional services industries. Prior to joining Lowenstein Sandler, he served as Chief Operating Officer of a top 20 global law firm for more than 10 years and, previously, as Chief Financial Officer for two other national law firms. Joe holds an M.B.A. from Boston College and a B.S. from Northeastern University.



Matthew Peters
National Innovation Leader
McCarthy Tétrault

Matthew Peters is McCarthy Tétrault's National Innovation Leader and partner in the firm's Technology Group. Matthew is responsible for the development of the firm's overall approach to the marketplace and clients. He also oversees the firm's industry and client programs, which incorporate the development of client service plans and operation of the firm's client satisfaction measurement program.

Matthew has been ranked among Canada's top lawyers by numerous publications. Most recently, he was recognized as a Change Agent in Law in 2019 by the Lexpert Zenith Awards. Matthew was also recognized in the Business category for being a driver of change in the firm and legal industry in 2019 for the Top 25 Most Influential Lawyers. In 2017, Matthew was recognized in The Best Lawyers in Canada in the area of technology law and information technology law, and he has been named The Best Lawyers' Vancouver Technology Law Lawyer of the Year in 2012 and 2015. He also appears in the 2017 edition of the Canadian Legal Lexpert Directory as a leading lawyer in the areas of computer and IT, technology transactions and private equity. He was the recipient of the 2010 Lexpert Rising Stars: Leading Lawyers Under 40 award for his exceptional leadership and the high level of service he provides to his clients. Matthew received his LLB in 1994 and was called to the British Columbia bar in 1995.

McCarthy Tétrault LLP is Canada's first national law, with more than 550 lawyers across all major business centres in Canada (Vancouver, Calgary, Toronto, Montréal and Québec City) as well as in New York and London, UK.



Caroline Tsai
Chief Legal Officer and Corporate Secretary
Western Union

Caroline Tsai is Chief Legal Officer and Corporate Secretary for Western Union and a member of its executive leadership team. The Western Union Company is a Fortune 500 (NYSE: WU) financial services company, based in Denver, Colorado. Tsai is responsible for the overall strategic leadership and oversight of Western




Union's global legal affairs, enterprise risk, public policy and regulatory affairs, ethics, privacy, and corporate secretarial functions. Tsai also oversees compliance.

Prior to joining Western Union, Tsai was Deputy General Counsel and Chief Regulatory Officer at BMO Financial Group. While at BMO Financial Group, Tsai advised on advocacy and policy initiatives, as well as all bank regulatory and supervisory issues for BMO's global operations, including Personal and Commercial Banking, Wealth Management and Capital Markets. She also served as Chief Legal Officer, U.S. Personal and Commercial Banking at BMO Harris Bank.

Earlier in her career, Tsai served as Senior Vice President & Associate General Counsel at Bank of America Corporation where she was responsible for a broad range of issues, including litigation, bank regulatory matters, the CFO Group and Global Banking and Markets. She began her legal career at the global law firm, Jones Day specializing in complex structured transactions for investment banking clients.

Tsai is a strong champion for diversity and inclusion and formerly served as Co-Chair of the Women's Leadership Network of the National Asian Pacific American Bar Association.

Born in Sao Paulo, Brazil, Tsai is the daughter of Chinese immigrants. She earned a Bachelor of Arts degree from the University of Michigan and a juris doctor degree, magna cum laude, from The American University, Washington College of Law and served as Executive Editor of The American University Law Review.



HBR Consulting (www.hbrconsulting.com) delivers advisory, managed services and software solutions that increase productivity and profitability, while mitigating risk for law firms, law departments and corporations. As trusted advisors with deep industry experience, clients partner with HBR to achieve significant, sustainable results.