



Virtual Sessions September – October 2021



Strengthening Relationships and Accelerating Progress Through Alignment and a Common Vocabulary

Legal Lab 2021

Recent years have seen ongoing improvement in communication and collaboration among members of the legal ecosystem, resulting in deeper relationships and a number of advances. Nevertheless, law departments, law firms, and others continue to have disparate perspectives on critical areas, in some cases hindering continued progress.

To continue to drive the legal industry forward, law departments, law firms, and others in the legal ecosystem must develop common frameworks, metrics, and a common language to define, address, and measure progress related to their shared challenges and opportunities. While there are efforts underway across multiple dimensions, the volume of initiatives create potential for misalignment.

Legal Lab 2021 participants will work together to identify critical areas related to each of its three pillars – talent, service delivery, and technology – where alignment and a common vocabulary enable accelerated forward motion.

Talent, Service Delivery + Technology

The **Talent**, **Service Delivery**, and **Technology** sessions will each include a brief IdeaXchange to stimulate thought, followed by small group discussions in which participants will be asked to:

1. Identify a specific topic related to the Legal Lab pillar where alignment or a common vocabulary would accelerate the legal industry's evolution;
2. Discuss the relevant considerations and “elements”; and
3. Develop a “formula” that will drive alignment in that area.



Session 1: Introductions, Industry Trends + Networking

Thursday, September 9 | 4:00 p.m. CT

TIME	SESSION
4:00 p.m.– 4:30 p.m. CT	<p>INTRODUCTION + INDUSTRY TRENDS</p> <p>Introduction, Opening Remarks Kevin Clem, Chief Commercial Officer, HBR Consulting</p> <p>Industry Trends Briefing SPEAKERS Bobbi Basile, Managing Director, HBR Consulting Lauren Chung, Managing Director, HBR Consulting</p>
4:30 p.m.– 5:20 p.m. CT	<p>NETWORKING</p> <p>Taste of Nashville + Friendly Feud Featuring Hattie B's Hot Chicken + The Hummus & Pita Co.</p>
5:20 p.m.– 5:30 p.m. CT	<p>Score Tabulation + Wrap Up</p>

Session 2: A Formula for Talent Alignment

Thursday, September 23 | 1:00 p.m. CT

TIME	SESSION
1:00 p.m.– 1:25 p.m. CT	INTRODUCTIONS + IDEAXCHANGE FEATURING Patti Scott , Director of Career Development, Lowenstein Sandler LLP
1:25 p.m.– 2:05 p.m. CT	BREAKOUT GROUPS Potential areas for consideration: <ul style="list-style-type: none">• Competencies• Diversity, equity + inclusion• Effects of remote vs. in-person work environment• Other
2:05 p.m.– 2:30 p.m. CT	BREAKOUT GROUP PRESENTATIONS + WRAP UP



Session 3: A Formula for Service Delivery

Thursday, September 30 | 1:00 p.m. CT

TIME

SESSION

1:00 p.m.–
1:25 p.m. CT

INTRODUCTIONS + IDEAXCHANGE

FEATURING

James (Jim) Hannigan, Director of Legal Project Management, Coblenz Patch Duffy & Bass LLP, and Member, Standards Advancement for the Legal Industry (SALI) Alliance

1:25 p.m.–
2:05 p.m. CT

BREAKOUT GROUPS

Potential areas for consideration:

- Classification of matters and work
- Outside counsel evaluation standards
- Best practices for specific types of service
- Other

2:05 p.m.–
2:30 p.m. CT

BREAKOUT GROUP PRESENTATIONS + WRAP UP

Session 4: A Formula for Technology Alignment

Thursday, October 7 | 1:00 p.m. CT

TIME	SESSION
1:00 p.m.– 1:25 p.m. CT	INTRODUCTIONS + IDEAXCHANGE FEATURING Jessica Vander Ploeg , Senior Legal Operations Manager, NetApp Andy Banquer , Vice President, Corporate Solutions, QuisLex
1:25 p.m.– 2:05 p.m. CT	BREAKOUT GROUPS Potential areas for consideration: <ul style="list-style-type: none">• Standardization of legal technology interfaces• Technology for measuring and/or managing standards• Data standards• Other
2:05 p.m.– 2:30 p.m. CT	BREAKOUT GROUP PRESENTATIONS + WRAP UP

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.



Ellen Kaye Fleishhacker
Co-Managing Partner
Arnold & Porter

Ellen Kaye Fleishhacker leads the firm's Investment Management practice group. Her practice focuses on investment management related matters, including formation, compliance and transactional matters of real estate funds, hedge funds, venture funds, private equity funds, and impact investment funds.



She also represents wealth advisory firms, family offices, and financial institutions on legal, compliance, and transactional matters associated with their investment management and related operations. In addition, Ms. Fleishhacker works with investors on structuring and negotiating potential investments in private funds, separate accounts, joint ventures, real estate partnerships, and other investment vehicles.

Ms. Fleishhacker also serves as Co-Managing Partner of the firm.

Her practice also includes counseling and negotiation in such contexts as acquisitions, dispositions, and reorganizations of investment management firms, as well as incident responses, internal investigations, and regulatory examinations. Ms. Fleishhacker regularly collaborates with her colleagues to provide comprehensive service to investment management firms, and particularly to help them anticipate and address the challenges and opportunities that arise from the complex and ever-changing legal and regulatory environment in which they operate.

Ms. Fleishhacker has lectured and written frequently on various investment management related topics, including legal considerations uniquely applicable to real estate fund sponsors, legal matters related to impact investing, legal and regulatory issues related to the allocation of fees and expenses by private investment funds, and private equity secondary transactions. Ms. Fleishhacker is also the co-author of a book on limited liability companies.



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.



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.



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 LLC (HBR) provides law firms and corporate law departments with strategic guidance, operational improvement, and technology solutions that drive innovation while managing cost and mitigating risk. HBR's proven combination of experience, relationships, and insights – spanning the legal ecosystem – delivers sustainable financial and competitive advantages for its clients.