



The Thomson Reuters Institute
proudly presents

The 2021 Emerging Legal Technology Forum
Spurring Innovation and Adaptability
November 4, 2021 - Boston Park Plaza, Boston, Massachusetts

Chair:

Aileen Schultz, Senior Manager, Labs Programs – Global, Thomson Reuters Labs

Program (all times local)

8:00am - 9:00am **Registration and Breakfast**

9:00am – 9:15am **Opening Remarks from the Chair**
Aileen Schultz, Senior Manager, Labs Programs – Global, Thomson Reuters Labs

9:15am – 10:30am **A New Order: Legal Tech and the Reality of Post-Pandemic Service Delivery**
Necessity is the mother of innovation and law firms and corporate legal departments faced significant headwinds throughout 2020. Indeed, once regarded (by some) as a nuanced luxury, legal tech is now seen as a vital necessity for business in the current climate. This engaging discussion assesses the impact of legal technology innovation spurred by pandemic-related challenges. Key conversation points include:

- COVID era client feedback and evolving needs (courtesy of Acritas Star Performers data)
- Measuring the value of new, pandemic-spurred legal tech innovations
- Adapting operating models and assessing talent needs
- Future outlook on legal technology and innovation

Moderator:

Zach Posner, Co-Founder and Managing Partner, The LegalTech Fund

Panelists:

Joseph Borstein, CEO, LexFusion

Nicole Bradick, Founder & CEO, Theory and Principle

Wendy Butler Curtis, Chief Innovation Officer, Orrick

Jeroen Plink, Former, CEO, Clifford Chance Applied Solutions

10:30am – 10:45am **Networking Break**

10:45am – 12:00pm **Breakout Discussions**

In these facilitated breakouts, Forum participants will have the opportunity to share practical ideas with leading firms and industry peers.

Breakout #1

Reexamining Technological Spend in a Time of Volatility: Is Technology Investment the Answer?

The financial impact of the pandemic across industries, including legal services, cannot be underscored enough. For law firms in particular, positive year-end financials, following a period of fiscal austerity, raise intriguing questions in a post-pandemic landscape where tightening purse strings and modest legal spend appear par for the

course. This discussion closely examines the specific challenges facing law firms and corporate clientele asked to do more with less. Key discussion points include:

- Pandemic and Security
- Determining your value drivers
- Measuring and quantifying the ROI on technology spend
- How to effectively validate the value of newly emerging technologies
- Exploring and weighing the value of ALSPs (Alternative Legal Service Providers)
- Talent strategy and considerations

Moderator:

Kenneth Jones, Chief Technologist, Tanenbaum Keale

Panelists:

Cheryl Wilson Griffin, Chief Customer Success Officer, Lupl

Catherine McPherson, Legal Technology Strategist, BartlitBeck

Karen M. Wiltgen, Principal and National Consulting Leader for Professional Services, RSM

Breakout #2:

Critical Resources: Recalibrating COVID-Era Workflow & Knowledge

Management Capabilities

COVID-19 underscored the importance of digital research resources and efficient workflow platforms for legal services professionals. Indeed, but for the diligence and critical planning of librarians and knowledge management professionals, the inability of colleagues to enjoy 24/7 access to legal research and automated workflow tools would have had unenviable consequences for the business. Now, with the return-to-office movement well underway, an increased emphasis on KM capabilities and optimized workflow is forcing firms to revisit—or in some instances embrace—design thinking principles well beyond a simple tabletop exercise. This session solicits practical guidance from firms (pro)actively (re)assessing enterprise workflow. What strategies exist for firms and departments navigating stranger tides? What lessons has the pandemic taught organizational and operational leaders about the future of legal work?

Moderator:

Rob Saccone, Partner, NexLaw Partners

Panelists:

Elisabeth Cappuyns, Director of Knowledge Management, DLA Piper

Christopher Laut III, Director of Library and Knowledge Services, Sullivan & Worcester

Jennifer Mendez, Director of Knowledge Management Innovation, Fisher & Phillips

12:00pm – 1:00pm

Networking Luncheon

1:00pm – 2:00pm

AI and the Human Element: Elevating the Role of Legal Services Professionals through the Human-Centered Development and Adoption of AI

Theories abound over the role of humans in the development and adoption of AI and machine learning. How can we ensure these technologies are developed and adopted in a way that ensures safe and trustworthy use? There is a growing body of work surrounding the topic of Human-Centered AI. This session, hosted by Thomson Reuters Labs, explores why, where, and how this topic is rising to the mainstage and driving a much-needed transformation of modern business. Our panel discussion will review critical concepts such as explainability, trustworthiness, bias detection and mitigation, and the current regulatory landscape for governing the human centered development and adoption of AI solutions. Attendees will depart with a clear understanding of:

- Major headwinds and issues within the legal industry specifically
- Best practices for supporting human centered AI in large and small organizations

Moderator:

Aileen Schultz, Senior Manager, Labs Programs – Global, Thomson Reuters Labs

Panelists:

Sally Gao, Data Scientist, Thomson Reuters Labs

Stas Gayshan, General Counsel, CIC Health

Simona Tiribelli, Director of Ethics, AI & Global Health, Institute for Technology & Global Health

2:00pm – 2:15pm

Break

2:15pm – 3:15pm

Broad Horizons: Risk, Regulation & Reward in the Evolving Blockchain Landscape

The continued maturation and evolution of blockchain technology holds profound ramifications for the legal profession. Whether in central banks, consumer markets, or cloistered government chambers, scrutiny over blockchain and its lucrative (if risky) derivatives continues to stoke a perfect storm of opportunity and apprehension for in-house and outside counsel. This conversation offers a timely update on key trends and developments impacting our global business environment. At a time when concerns over illicit and decentralized finance comingle with investor enthusiasm for Bitcoin, Dogecoin, Litecoin, Ethereum, and NFTs, are lawyers and compliance professionals poised to handle the wave of things may come?

Moderator:

Nadia V. Gil, Head of Strategy and Operations, Cloud Security, Google

Panelists:

Dazza Greenwood, Founder & CEO, CIVICS.com Consultancy Services

Jorge Pesok, General Counsel and Chief Compliance Officer, Tacen

Doug McCalmont, Co-Founder & Chief Technology Officer, Chrysalis Digital Asset Exchange

Joseph Raczyński, Technologist & Futurist, Thomson Reuters

3:15pm – 3:30pm

Networking Break

3:30pm – 4:30pm

Breakout Discussions

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Breakout #1:

Dark Tidings: Business Disruption and Third-Party Risk Management in the Wake of the Pandemic

External partners and third-party providers are key cogs for a successful business. The past twenty months have underscored not only the intrinsic value of these trusted business relationships, but also the inherent degree of third-party risk each partnership contains therein. This session offers a timely dive into how law firms and corporate legal departments are addressing a new spate of threats from outside their organizational walls. Key talking points include:

- Third-party risk management, due diligence, and supplier challenges
- New technological opportunities and use cases for legal and business professionals
- Regulatory developments in the post-pandemic environment
- People and evolving talent skill sets for effective risk management

Moderator:

Christina Ayiotis, Member, Global Advisory Board, VigiTrust

Panelists:

Chris Guido, Program Management Office, Technology Lead, Commonwealth of Massachusetts

Jenny Hedderman, Risk Counsel, Office of the Comptroller, Commonwealth of Massachusetts

Robbie Hinz, Vice President, Associate General Counsel, VillageMD

Breakout #2:

Leading by Design: Examining AI-Assisted Recruiting in Legal Services

With the battle for talent in legal services entering a new era of competition, AI-assisted recruiting is helping preeminent law firms and corporate legal departments pull ahead of the proverbial pack. Indeed, thanks to technology, the talent recruitment process is now drastically reduced, allowing hiring managers and HR professionals more time to focus on high-quality applicants, more meaningful and instructive conversations, as well as an improved overall recruitment experience. This session explores the cost, opportunities, and return on investment of talent acquisition technologies today. Will the growing popularity of AI-assisted recruiting help accelerate inclusive and sustainable practices across the legal profession?

Moderator:

Bryan R. Parker, CEO, Legal Innovators

Panelists:

Sang Lee, CEO and Co-Founder, Thine

Laura Leopard, Founder and CEO, Leopard Solutions

John A. Nathanson, Partner and Firm Hiring Committee Head, Shearman & Sterling

4:30pm

Closing Remarks and Reception