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The Thomson Reuters Institute
proudly presents

The 5th Annual Emerging Legal Technology Forum

Re(de)fining the Digital Client Journey

October 13, 2022

Arcadian Loft - Toronto, ON

Co-Chairs:

Suzanne Donnels, Chief Business Development & Marketing Officer, Davies Ward Phillips & Vineberg LLP
Pablo Rodriguez, General Manager Canada and Vice President, Strategy & Commercial Policy, Thomson Reuters

Program (all times local)

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

9:00am – 9:15am **Opening Remarks**

Co-Chairs:

Suzanne Donnels, Chief Business Development & Marketing Officer, Davies Ward Phillips & Vineberg LLP
Pablo Rodriguez, General Manager Canada and Vice President, Strategy & Commercial Policy, Thomson Reuters

9:15am - 10:15am

Realms Uncharted: Legal Service Recalibration in the Experience Economy

For law firms and corporate legal departments in the digital age, embracing a versatile and sustainable client journey is a core lever for success. From intake to invoicing, client service is increasingly viewed across a constellation of *experiences*—both in-person and virtual—influenced by technology, 24/7 connectivity, and interpellative social forces. This opening session pivots upon a simple yet nuanced premise: in an increasingly competitive and tenuous market, what does exemplary client service *truly* look like? How confident are industry leaders in the profession’s embrace of the modern experience economy? Is the modern legal services delivery model wholly sufficient or in need of a proverbial tune-up? Our distinguished panel of industry leaders shall discuss.

Moderator:

Joe Green, Of Counsel & Director of Client Experience, Gunderson Dettmer

Panelists:

Horatiu Druma-Strugariu, Head of Canadian Content, Alexsei

Monica Goyal, Director of Legal Innovation, Caravel

Rob Morris, National Chief Operating Officer, Borden Ladner Gervais LLP

Ginevra Saylor, Director, Innovation and Knowledge Programs, Gowling WLG

10:15am – 10:30am

Break

10:30am - 11:30am

Ascendent Engineering: Emergent Techniques in Data Analytics and Strategic Account Management

In an economic downturn, strategic account management is an effective means for corporate legal departments and law firms to demonstrate value, partnership, and growth. Indeed, thanks to enhanced data analytics and increasingly sophisticated technologies, legal service providers are poised to strategically enhance client relationships through proactive and efficient means. What are legal service providers doing well—or ultimately lacking—in their current account management approach? What resources can prompt more informed and productive engagement with key clients? How is the latest wave of data analytics capabilities helping providers align with broader enterprise goals or priorities?

Moderator:

Brian Zubert, Sr Director, Product Management, Thomson Reuters

Panelists:

Olalekan (Wole) Akinremi, Partner, Deeth Williams Wall LLP

Joy Cruz, Director, Business Intelligence & Data Analytics, RSM US LLP

Philipp Thurner, CEO, Nexl

11:30am - 11:45am

Break

11:45am - 12:45pm

Pathways of Promise: Digital Content Strategy and the Evolving Martech Stack

With COVID-19 prompting a dramatic pivot toward digital strategies and online marketing, scrutiny around content planning and the existing marketing technology (“martech”) stack is a valuable exercise. Whether through bespoke interactive web portals, dynamic mobile applications, webinars and 3D virtual conferences, or CRM and email marketing integration, the tools with which legal service providers develop and deploy strategic content continue to evolve. This session offers a rigorous examination of modern content creation and technology platforms across the profession. How are law firms and corporate legal teams (re)evaluating the way clients consume and access insights? Where and how might martech—or knowledge management writ large—be reimaged to meet client needs and best support employees?

Moderator:

Paula Zirinsky, Co-Founder and Chief Strategist, Structura Strategy Group LLC

Panelists:

Al Hounsell, Senior Innovation Lawyer, Norton Rose Fulbright LLP

Sukesh Kamra, Chief Knowledge & Innovation Officer, Torys LLP

Judith McKay, Chief Client and Innovation Officer, McCarthy Tetrault LLP

12:45pm - 1:45pm

Networking Luncheon

1:45pm - 2:45pm

Approaching the Verge: Opportunity and Reward in Web 3.0 Technologies

By some estimates, the arrival of Web 3.0 (“Web3”) is expected to generate 1.76 trillion US dollars in GDP growth over the next decade—a not insignificant figure to the legal profession. As many in the industry are aware, legal client demand for guidance on a host of Web3 technologies—cryptocurrencies, NFTs, and DAOs—has yielded a flurry of new specialized practice areas and outpouring of lucrative work in both mature and emerging markets. Blockchain, famously described as the most significant new technology since the internet, has clearly become an influential fixture in the global public square. And with blockchain-based Web 3.0 now gathering steam, savvy legal service providers are moving quickly to shore up bench strength and enter the untamed wilds of the metaverse. This presentation offers an important and comprehensive look at opportunity and reward

around this newest technological innovation. Where and how can legal service providers lay claim to such fertile ground?

Moderator:

Aileen Schultz, Director, Data and Model Policy and Ethics, Thomson Reuters

Panelists:

Yinka Oyelowo, Principal Lawyer, Yinka Law

Amy ter Haar, Legal Counsel, Global University System and Board Member, Ocean Falls Blockchain Group

Matthew Rappard, Chief Technology Officer, Vaultie

2:45pm - 3:00pm

Afternoon Break

3:00pm - 4:00pm

Journey's End: Maximizing Value in Client Experience

No client journey is complete without the opportunity to share feedback on one's overall experience. Indeed, across the global legal profession, there is a direct correlation between formal client feedback processes and improved legal fee realization, according to Thomson Reuters Market Insights research. This closing conversation offers a timely and interactive opportunity to understand the tremendous potential of client experience audits within small to large organizations. Participants are asked to consider the evolution and impact of after-action reviews or client listening and feedback initiatives in a dynamic and transformative market.

Moderator:

Arthur Wilson, Founder and President, LeanSixLegal

Panelists:

Suzanne Donnels, Chief Business Development & Marketing Officer, Davies Ward Phillips & Vineberg LLP

Fernando Garcia, Vice President, Legal and General Counsel

Janet Sullivan, eDiscovery Counsel and Global Director of Practice Technology, White & Case LLP

4:00pm - 5:00pm

Closing Remarks & Networking Reception

Co-Chairs:

Suzanne Donnels, Chief Business Development & Marketing Officer, Davies Ward Phillips & Vineberg LLP

Pablo Rodriguez, General Manager Canada and Vice President, Strategy & Commercial Policy, Thomson Reuters