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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:
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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 reimagined 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**

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