



# Global LPM Summit

## October 16 – 17, 2023



### **October 16, 2023**

**Using Data to Drive Matter Performance:** Managing matters effectively and efficiently today means using data analytics. This session will share case studies of law firms and legal departments using data and legal project management to enhance matter performance. Topics include self-service metrics to enhance real-time communication with clients, data-based budgeting, LPM powered by access to dynamic metrics, the law department and law firm metrics perspective, and using metrics to improve diversity and staffing. This session will empower legal professionals to leverage data analytics and insights to optimize matter performance. Through case studies, participants will learn how to collect, analyze, and interpret relevant data to make informed decisions and improve the outcomes of legal matters. The program focuses on understanding the types of data available within law firms and law departments and how to leverage it effectively.

**Speakers:** **Amanda Chaboryk**, Head of Legal Data and Systems, PwC; **Janine Dixon**, Legal Operations Manager, Meta; and **Steven Smith**, Director – Matter Management Solutions, WilmerHale

**Managing Portfolios of Legal Matters Using Data and Legal Project Management:** Trying to ensure you are on top of all the legal work in a department can be a general counsel's nightmare. Figuring out the best way to understand matters at a 30,000 foot and a micro level can be incredibly time-consuming – but is critical to manage risk, compliance and legal spend. Learn how a forward-looking Associate General Counsel got control of a large portfolio of work using data and legal project management. This session will offer a case study from which many other law departments can benefit. The program focuses on understanding the needs of types of data available within law firms and law departments and how to leverage it effectively.

The speakers will share their experience of how reviewing and relying on the data inspired new thinking in a well-established legal department. Panelists will discuss the behind-the-scenes thought process surrounding the bold move to send an entire portfolio out for RFP and the decisions that went into selecting the outside service provider. From there, you'll learn more about the practical implications of transitioning the work and follow one case study into how LPM (people, processes, and technology) can assist in onboarding and regular portfolio management. This session will also include a moderated Q & A session with the audience to dive deeper into how successful portfolio management can help in-house counsel use data to work closer to the top of their license and provide greater and more strategic support for the business.

**Speakers:** **Tanya Hampton**, Senior Legal Project Manager, SeyfarthLean Consulting and **Lonette Merriman**, Vice President, Associate General Counsel, Constellation Brands



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**Using Legal Project Management To Manage Outside Counsel and Reduce Legal Spend:** In-house and law firm professionals will discuss ways to improve law department performance through smart sourcing and legal project management. Hear ACC Value Champion UBS representatives share their Smart Sourcing framework for selection and management of external legal providers. Participants will hear case studies and practical tips to effectively manage outside counsel engagements and drive efficiency in legal spend, ultimately delivering increased value to their organizations.

**Speakers:** **Vincenzo Purificato**, Executive Director and Head of Strategic Change Management, UBS Outside Counsel Management Team and **Mike Russell**, PMP, LSSBB, Head of Global Legal Operations, Expedia

**Solving Pain points: When Legal Departments and Law Firm Legal Project Managers Align for Strategic Impact – A real world discussion of solving law department pain points:** Legal project management is an ambiguous term in legal organizations today. These roles can range from imbedded professionals guiding matter teams and keeping them on track to those leading large portfolios of matters for large companies. Being effective as a Legal Project Manager requires far more than simply an understanding of project management. Legal project managers today interact directly with clients – internal or external as they foster effective communication with the client and internal teams, collaborate cross-functionally to address client needs and overall, solve problems and address “pain points”. Embedded LPMs working with matter teams have identified that a substantial amount of tasks currently performed by lawyers are “non legal” in substance and can be performed by a project manager. This in turn allows the legal team to focus their attention on solely legalistic tasks, increasing efficiency and improving the client experience across the board. Legal project management teams in law firms can be the law department’s ally in meeting their objectives. These panelists will share their experiences and insights using LPM tools and techniques to align projects with client objectives and contribute to the overall growth and success of their organizations.

**Speakers:** **Helen Cristofalo**, Director of Legal Project Management, Paul Weiss Rifkind Wharton & Garrison LLP; **Jessica Davis**, Director, Matter Performance & Service Innovation, McCarter & English, LLP; and **Kieran Quinn**, Senior Legal Project Manager, Allen & Overy



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**October 17, 2023** (cont.)

**From the Front Lines:** Best Practices for Outside Counsel Management: Corporate legal departments continue to search for new processes and technologies to ease the burden of outside counsel management and to reduce their outside counsel legal spend. This includes requests for proposal for panel counsel, coordination & management of litigation portfolios, convergence processes, matter specific requests for proposal, and the implementation of new matter management technologies. Likewise, their law firm counterparts are searching for methods to differentiate their performance, improve estimating capabilities, implement their own monitoring tools and demonstrate more value.

In this program, we will hear from professionals on both sides of the aisle about their experience pursuing and implementing these objectives. Corporate legal department professionals will describe their own experiences - including the successes and pitfalls in the process - with programs designed to achieve a balance of quality legal service, reasonable costs and improved transparency. Likewise, law firm participants will describe engagements where approaches such as legal project management have achieved significant value for both the client and the law firm, and engagements where new technologies or client-side requirements presented challenges to the delivery process. The goal of this presentation is to help legal operations professionals target their efforts and resources on proven solutions that achieve these objectives and to be prepared to address the challenges they may encounter.

**Speakers:** **Jennifer Cooper**, Shareholder, Baker Donelson Bearman Caldwell & Berkowitz PC; **Jim Kochinski**, Deputy General Counsel & Chief Compliance Officer, Crawford & Company **Chad Peterson**, Corporate Counsel – Litigation, Mercedes-Benz USA and **David Rueff**, Chief Client Solutions Officer, Baker Donelson Bearman Caldwell & Berkowitz PC

**Leveraging LPM and Scoping to Ensure Better Pricing, Efficiency and Risk Management:** Leading law firms are hiring pricing and LPM professionals, leveraging data and tools to scope and staff matters more effectively, and are beginning to dive deep into the concept of "value" to determine what to charge for their services to maximize margins and profits. Like any well-run business, these leading law firms are breaking down work, analyzing processes and applying discipline and resources. While a small number of corporate legal departments--typically the most mature and well resourced--are undertaking similar steps, the vast majority have not even recognized the need, let alone begun this journey.

Learn how legal departments can use LPM at the outset of legal matters with outside counsel to ensure that the parties are on the same page about scope, assumptions, resourcing/staffing and risk tolerance. This interactive workshop will use a case study of a legal matter to help attendees understand a process for ensuring outside counsel is on the same page as the legal department — which results in better pricing of legal matters.

**Speaker:** **Susan Raridon Lambreth**, Principal, LawVision and Founder, LPM Institute

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**Intentional Management: How one data-driven DEI program embedded Legal Project Management into the Kaiser Permanent legal department culture:** Kaiser's innovative approach to "moving the diverse staffing needle" enabled practicing attorneys, both internal and external, to intentionally manage matters to create both DEI and total matter value outcomes. Through its award-winning DEI initiative and related "Mindful Staffing" CLE program, Kaiser educated internal and external counsel to interrupt their internal staffing biases, facilitate succession planning, and introduce diverse attorneys into substantive work on matters. By embedding DEI expectations in their Outside Counsel Guidelines, RFPs, budget planning, and using AI-enabled data analytics Kaiser introduced broadly applicable legal project management techniques into the lifecycle of managing matters.

In this program, we will discuss how Kaiser's DEI program planted the seed of LPM into a motivating method for attorneys to adopt legal project management principles across all matter outcomes. Their "Impact Spending" program focused on the Top 10 spending firms. It engaged 20 in-house attorneys – DEI committee members and the firm relationship contacts – to maximize culture change and minimize the burden on individuals. Kaiser's legal operations team supported the efforts with data dashboards and vendor management – including incorporating results into quarterly business reviews and scorecards. Utilizing BigHand Impact Analytics team (formerly Digitory Legal) to provide data coding and project management training resulted in an increase in meaningful succession planning at the top ten firms (which serves both business and DEI objectives), a double-digit increase in career-advancing work allocated to diverse timekeepers; and an emphasis on "mindful staffing" (i.e., project management) that dramatically improved budgeting and case management results.

**Speaker: Greg Kaple**, Senior Director of Legal Business Solutions, Kaiser Foundation Health Plan

### ***Virtual Sessions***

**Leveraging LPM Technology to Better Serve Clients:** The LPM Universe (meaning the processes and outputs) delivers benefits to the law firms that employ these tools and the clients they serve. LPM processes and the technologies that facilitate the deployment of these processes are key to consistent, proactive, and predictive service delivery and solutions to clients' ever-changing needs. The outwardly visible benefits include improved communication, proactive action on engaged worked, and clearly set and met shared expectations. These LPM tools, when provided directly to every team member, eliminate inefficient and/or delayed response, provide awareness of planned activities, progress of ongoing tasks and possible risks.

A panel of law firm participants will share their experience of how LPM technology deployments have resulted in improved client service and client growth. Successful LPM deployments include processes, people and technology aligned with a law firm's objectives to provide efficiency, client communications and firm growth. Panelists will discuss implementation considerations, client success stories, staffing considerations and lawyer adoption across all LPM functions including matter planning, task management, budget/financial management and monitoring.

**Speaker: Nathan Bowie**, Co-Founder. Planning Blox, LLC



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### ***Virtual Sessions*** (cont.)

**Improving the Law Firm / Client Relationship: Turning a Rainmaker Partner into an LPM Champion:** It's no secret that most (if not all) partners are resistant to change, but sometimes change is necessary to “save” a client relationship. Often, when facing issues that are more operational in nature, partners don't really know what they need and have no idea where to start. Those familiar with Legal Project Management know that it is the obvious solution. But what about those who aren't? How do you reach them? And more so, how do you convince them of the value? LPM is not completely mainstream, and a lot of partners are skeptical to introduce someone new to their client relationship. This session will tell the story of how the Paul Hastings Legal Project Management team used instinct, perseverance, and hard work to flip a resistant partner into an LPM believer and advocate. Jessica Dias will share her real-world anecdotes—including challenges, roadblocks and the elusive ROI—that can help people at all stages of their LPM journey.

**Speaker:** Jessica Dias, Legal Project Manager, Paul Hastings LLP

**Moderator:** Cassie Vertovec, Managing Director, Practice Management and Innovation, Paul Hastings LLP