
Sandpiper Partners LLC

Sixth Annual

DISRUPTION & INNOVATION **in the Delivery of Legal Services**

February 26, 2021 • New York
Virtual Zoom Format

Speaker Biographies

Preferred Premier Sponsors



Sponsors



**Stacey Blaustein, Counsel - Corporate Litigation, IBM Corporation,
Armonk, NY**



Ms. Blaustein is Counsel in the Corporate Litigation Department of the IBM Corporation in Armonk, NY, where she manages all aspects of E-Discovery from working on global and domestic cases to setting policies and best practices, ensuring compliance with E-Discovery and Data Privacy best practices, ensuring discovery is available from new workspaces through newly adopted technologies and tools, educating on recent rulings and decisions that affect best E-Discovery practices and providing daily guidance and implementation on emerging issues in E-Discovery, Global and Domestic Data Privacy, Records Retention and Information Governance practices within IBM.

She has also been integrally involved in Cross-Border Discovery and Data Privacy issues in her daily responsibilities on cases and legal matters, was very involved in GDPR compliance for Corporate Litigation in 2017 and 2018, as well as compliance in the Records Management Policy with GDPR for IBM and follows the Data Privacy field as it affects issues in litigation and discovery. She handles most third party (non-IP) subpoena practice for the company and several aspects of regulatory law. She has been with IBM for 12 years.

Her previous experience includes over 18 years as a securities litigation attorney and general litigation practice for the two years preceding. Aside from IBM, she is an active member of the Sedona Conference and is a member of Working Group 6 on Cross-Border Discovery, and the Mideast Data Privacy Subcommittee, Chairs the Corporate Counsel Section of Working Group 6, and is a Faculty Member of Electronic Discovery Institute. She speaks on panels and writes frequently on many of the topics mentioned above.

She is a graduate of Barnard College of Columbia University, and the Emory University School of Law.

Joe Borstein, CEO & Co-Founder, LexFusion, New York



Mr. Borstein is a veteran of the legal innovation world, having held both domestic and global growth-leadership roles at Pangea3 (via Thomson Reuters and EY). He is a founding member of the advisory board of the University of Pennsylvania's Carey School of Law Institute for the Future of the Profession. He is also an investor and advisor to numerous legal innovation companies.

He is a double University of Pennsylvania alumnus, graduating from Penn Law in 2005 and receiving his Bachelor's Degree from Penn in 2002. Additionally, he has received a Certificate of Business and Public Policy from The Wharton School.

Kevin E. Broyles, Managing Partner, FisherBroyles LLP, Atlanta



In 2002, Mr. Broyles co-founded FisherBroyles. Since that time, he has played a key role in managing, adapting, and growing the firm's Law Firm 2.0® model. Formerly a litigator and corporate technology attorney at traditional law firms for eight years, he was exposed to different law firm management styles and a diverse group of entrepreneurial clients. These relationships helped form his views on legal efficiency and client-focused services, as well as his desire to disrupt the outdated ways of practicing law. He frequently writes and speaks about law firm disruption, alternative legal service models, inclusion and diversity, technology innovations in law, and law firm management.

Although he no longer bills time, he continues to provide trusted legal advice and strategic guidance to his clients. He devotes the majority of his time to helping his partners succeed, rescuing Oldlaw attorneys from the 20th century practice of law, and growing FisherBroyles into one of the most impactful and creative law firms in the world.

Douglas D. Caddell, Global CIO, Mayer Brown LLP, Chicago



Mr. Caddell is the Global Chief Information Office of Mayer Brown. He has been with Mayer Brown since June 2016. He is a veteran CIO, legal industry technologist and internationally recognized speaker and writer on legal technology. He has over 30 years' experience in finance, operations and management and in leading the technology efforts of a variety of organizations, including mid-sized and large law firms and a governmental law department. He has a degree in Management Information Systems (MIS), and also Accounting from the top ranked MIS program at the University of Arizona. He has held professional certifications as a CPA and Certified Information Systems Auditor.

In 2004 he was honored as IT Director of the Year by New York based Law Technology News and in January 2009, he was further honored by Legal Technology Awards in London as International IT Director of the Year. In 2009 co-authored the book *Achieving Excellence in Legal Technology Management*, published by Thomson Reuters/West.

Patricia Callejón, Director – Contracts, Compliance and Commercial Services, Integreon, Guadalajara, Mexico



Ms. Callejón joined Integreon in 2020 as Director of Contracts, Compliance and Commercial Services. Her primary focus is working closely with clients in the design and implementation of highly efficient and cost-effective contracting processes in the US, Europe, Asia, Australia, and Latin America. Patricia is a contract lifecycle management (“CLM”) expert who has been not only responsible for implementations and training programs but has been a member of CLM management teams in charge of corporate strategy, product vision, delivery, and customer success initiatives. As a CLM expert, she has coordinated cross-functional team activities, including engineering, product, support, project management, and quality control, to ensure high-quality execution and delivery of CLM projects while meeting deadlines, budget, and customer expectations.

Clients benefit from her unique combination and wide breadth of skills including CLM solution design, operational optimization, service design, business process management, contract analytics, project management, as well as contracting, litigation and arbitration in both big law and start-up environments.

She brings over 10-years of global expertise experience to Integreon’s contracting service offerings. Most recently, she served as head of ContractRoom’s multi-national Contract Solutions team where she was responsible for the implementation of key customer accounts, dramatically accelerating processes and optimizing content leading to 10x improvements in speed, control and data analytics. Prior to joining ContractRoom, she was an associate for corporate and finance law at Norton Rose Fulbright and Baker McKenzie.

She is fluent in English and Spanish and received her law degree at the Monteávila University in 2013.

**Candice Carr, Senior Corporate Counsel – Modern Legal – Storyteller,
Microsoft, Redmond, WA**



Ms. Carr is a Senior Corporate Counsel in Microsoft's Corporate, External, and Legal Affairs (CELA) department. She is a member of Microsoft's Modern CELA team within the Office of the General Counsel. Her primary role as Storyteller is to help drive positive change in our legal ecosystem through stories of digital transformation, successful use of Microsoft solutions, and cultural adoption of Microsoft technology to help them work better. Prior to her role with Modern CELA, she served as the lead attorney for the Microsoft Online Stores ecommerce business, which operates in over 190 markets, where she managed global outside counsel to support new business model developments, market expansions, customer

satisfaction issues, and regulatory matters. During her career at Microsoft, she was also a lead transactional attorney for Microsoft's Global Procurement business managing a substantial volume of SaaS and Software Licensing deals and partnerships that served to empower business teams across the company.

Before her time at Microsoft, she was in private practice at Perkins Coie and Graham and Dunn as a Business and Transactional attorney representing emerging private companies and U.S. public companies. At Perkins Coie, she was part of the team to launch the firm's Attorney Development Program focused on career development and mentorship for attorneys. She has had a career long commitment to pro bono work, including participation in small business workshops and corporate governance advice to non-profit boards. At Microsoft Candice, as a native Jamaican, has been able to pursue her passion around immigration rights as a legal volunteer with the Kids In Need of Defense Organization.

She is a member of Microsoft CELA African American/ Black Employee (AABEN) Network Steering Committee leading Diversity and Inclusion efforts to foster education, career development, leadership, and allyship within our communities.

She received her BA in Politics at Princeton and her JD at the University of Chicago – The Law School. She is licensed to practice in the States of Oregon and Washington.

Mark A. Cohen, Founder & CEO, Legal Mosaic, LLC; Contributor, Forbes, Executive Chairman, Digital Legal Exchange, Washington, D.C.



Mr. Cohen is a global thought leader and innovator in the legal industry. He is the CEO of Legal Mosaic, a legal business consultancy; regular contributor to Forbes where he has a column on the global legal marketplace; and sought-after international speaker. He and Richard Susskind have teamed up on “The Uncertain Decade,” a series of live digital events on different legal industry topics.

He serves as the Executive Chairman of the Digital Legal Exchange (DLEX), a global nonprofit learning/training institute, digital research and thought leadership repository, and community. DLEX is designed to accelerate digital transformation in the legal function and ensure the legal industry can keep pace with its corporate counterparts.

He was appointed by the Singapore Academy of Law (SAL) in 2018 to serve as its inaugural LIFTED “Catalyst-in-Residence” and concurrently serves as the General Editor of the forthcoming LIFTED Global Partner white paper on future legal skills. He has been a Distinguished Fellow at Georgetown University Law Center and at Northwestern University Pritzker College of law and presently teaches at Bucerius (Germany), IE Spain), and the College of Law (Australia). His Legal Mosaic blog was recognized by the American Bar Association as one of the 50 outstanding worldwide legal blogs in their inaugural “Web 100.” He also serves as an Intelligence Fellow for ALM.

Brian Corbin, Executive Director, Assistant General Counsel – Litigation Department, JPMorgan Chase & Co., Buenos Aires, Argentina



Mr. Corbin is an Executive Director, Assistant General Counsel within the Litigation department at JPMorgan Chase bank. He serves on the leadership team of Legal Discovery Management, which advises and coordinates on the discovery process with internal counsel, external law firms, and service providers in connection with JPMC's litigation matters, regulatory inquiries, and investigations. In his role as discovery counsel and chief product owner for eDiscovery technology, he leads a multinational team, managing programs related to legal software development, process automation, legal holds, cross-border data privacy issues, and building sustainable offshore teams.

He is based in Buenos Aires, Argentina; prior to joining JPMC, he oversaw the delivery of legal services at an offshore provider in Bangalore, India, and he started his career at Covington & Burling LLP in Washington, D.C.

**David B. Cunningham, Chief Information Officer, Winston & Strawn LLP,
Houston**



Mr. Cunningham is the chief information officer of Winston & Strawn and a veteran advisor to large law firms in the United States, UK, and Europe. Backed by one the best teams in the legal market, he is accountable for creating a competitive edge for Winston & Strawn using technology, information, and business processes. Areas of responsibility include information technology, library/research, practice support, and eDiscovery for 2,000 users across 15 offices.

He was previously managing director of the IT and management consultancy Hildebrandt Baker Robbins where he led the technology strategy and risk management practices. He led audits, strategic technology planning, and interim CIO roles for over 200 law firms, including fundamental IT transformations and outsourcing.

He has developed market leading approaches to improving technology and value in risk intolerant markets, including the “Technology Scorecard” which audits costs, staffing, ITIL-based IT process maturity, technology design, and business process effectiveness and the “Operational Risk Management” methodology, which assesses conflicts of interest, new business intake, data privacy, IT, and other risks using ISO 27001 and 31000 standards.

In his 20 years with Hildebrandt Baker Robbins, he led full law firm merger integrations, including a two year integration effort for the third largest firm in the world, and he led the transition and growth of the firm’s London office from 2002 to 2005, including projects with firms in the UK, Germany, France, Hong Kong, The Netherlands, and Italy.

John Douglas, Senior Executive Vice President, Senior Advisor to the Chief Executive Officer, TIAA, New York



Mr. Douglas is Senior Executive Vice President and Senior Advisor to Chief Executive Officer Roger W. Ferguson, focused on the implementation of the organization's growth strategy. He also serves as Vice Chairperson of TIAA Bank.

He joined TIAA in 2018 as Chief Oversight and Advocacy Officer, overseeing the risk management, legal and compliance functions for the enterprise. He has 40 years of experience advising financial institutions on legal, business and regulatory matters, including regulatory compliance, acquisitions, investments and FinTech. He has guided financial services companies through significant legislative and regulatory changes,

from Garn-St. Germain to FIRREA to Dodd-Frank.

Prior to joining TIAA, he was a partner in Davis Polk's Financial Institutions Group, heading the firm's bank regulatory practice. During his tenure at the firm, he acted as a strategic legal advisor to TIAA regarding its 2017 acquisition of EverBank (now TIAA Bank). As General Counsel of the Federal Deposit Insurance Corporation in the 1980s, he supported the financial system through reform and restructuring efforts, participating in the landmark Financial Institutions Reform, Recovery and Enforcement Act of 1989 and assisting in the organization of the Resolution Trust Corporation.

He is chair of the executive committee of the Financial Services Volunteer Corps, a nonprofit organization formed under President George H. W. Bush to assist countries as they work to develop strong banking and capital market systems. He is regarded as one of the world's leading business lawyers and has twice been named a "BTI Client Service All-Star," a select group of lawyers recognized for exceptional service to Fortune 100 clients.

He holds a Bachelor of Arts degree in economics from Davidson College and a Juris Doctor degree from the University of Georgia School of Law.

**Neville Eisenberg, CEO of BCLP Cubed & Senior Partner, Bryan Cave
Leighton Paisner LLP, London**



Mr. Eisenberg is the CEO of BCLP Cubed and jointly developed the concept with BCLP's Chief Innovation Officer, Katie DeBord. He has a track record in legal innovation and was managing partner of legacy firm BLP when it launched various pioneering services such as Lawyers on Demand.

He has a corporate finance background specialising in UK and international mergers and acquisitions, joint ventures, inward investment, UK company law for public and private companies and privatisation work.

He is also qualified to practice in South Africa and is the Chairman of the British Israel Law Association and a fellow of the Institute of Advanced Legal Studies.

Michael A. Ellenhorn, Founder & CEO, Decipher, St. Louis, MO



As the Founder and CEO of Decipher, a competitive intelligence company, Mr. Ellenhorn is committed to empowering professional services leaders to make informed and just decisions through intelligence-driven transparency in lateral hiring. He has a passion for helping clients utilize actionable intelligence to achieve their business objectives.

He leads an experienced team of intelligence and data analysts who deliver credible, real-time actionable intelligence to professional and financial services organizations to support their key talent decisions. He believes deep-dive, pre-hire due diligence is the critical factor in the success of any enterprise; protecting both the business as well as internal and external stakeholders. His vision is to build Decipher to better safeguard the larger professional and financial services industries. A frequent speaker and author on the critical importance of utilizing competitive intelligence to mitigate talent-related risk in the legal market, he serves as a trusted advisor to law firms evaluating their lateral hiring programs and strategies.

He earned his B.A. from the University of Washington, his J.D. from Washington University in St. Louis School of Law, and studied business at City University in London, U.K.

**Scott Forman, Shareholder and Head of Innovation and Legal Operations,
Littler Mendelson, Miami**



MR. Forman provides strategic direction to Littler's ongoing efforts to develop technology solutions that re-engineer the delivery of legal services and enhance operational efficiency. He is the founder of Littler's award-winning Littler CaseSmart® (LCS), VirtualBinder, and Littler onDemand (LoD) platforms and leads a team of over 100 lawyers, researchers, technologists, and operational specialists working within these solutions.

A revolutionary approach to managing employment matters, LCS combines proprietary technology, redesigned legal processes, and efficient staffing to deliver high-quality legal services, fee predictability, and critical data analytics that drive insight and reduce risk. He founded LCS in 2010 to manage administrative agency charges and has since expanded the platform to include the defense of single-plaintiff employment litigation and class and collective actions.

Having streamlined the process for handling matters through LCS, he developed VirtualBinder to deliver insight and drive efficiency through case management for attorneys working within the platform. This technology uses automated workflow to track and manage the entire life cycle of a litigated case while informing attorneys exactly what tasks need to be completed, by whom and when. VirtualBinder also provides Key Performance Indicators and enables attorneys to transfer knowledge without the need for meetings, phone conference, and constant email communication.

Recognizing the challenges for employers that come with navigating a relentless stream of workplace legal questions, he founded LoD in 2019 to provide clients with a technology-based solution for receiving advice and counsel, along with critical data analytics. The platform streamlines the process of answering employment-related inquiries and houses all responses, creating a knowledge bank of information. In addition to providing greater efficiencies and consistency for clients, LoD provides insights that draw on their past experiences, account for developments in the law, and reflect experience across multiple organizations and industries.

He has represented clients in arbitrations and appellate matters and has several published decisions that provide employer-favorable case law. He regularly conducts seminars on employment law matters and has been an invited guest speaker to various functions.

He is a member of Littler's Board of Directors and is co-chair of the firm's Innovation Advisory Committee. His contributions to the firm's innovation have led to numerous recognitions. Most recently, in 2018, he was named among the Top Five Data Driven Lawyers by Law360. Littler CaseSmart – Class Action™ earned a distinction for innovation in the Financial Times' 2017 "North America Innovative Lawyers" report. Littler CaseSmart was also recognized alongside its

client as a 2017 ACC Value Champion by the Association of Corporate Counsel for driving value, while controlling legal spending and producing better results.

He is also a regular commentator in the media on issues related to legal technology and innovation and served as a panelist at the Disruption & Innovation in the Delivery of Legal Services event, hosted by Sandpiper Partners in November 2018. He is a founding member of Littler's Miami office and its former office managing shareholder. He is also a former co-chair of the firm's Retail Practice Group.

Simon Harper, Co-Founder, LOD Law, London



Mr. Harper started LOD in the UK in 2007 to provide a new way for lawyers and clients to work together. 14 years later, LOD has more than 800 lawyers across 9 locations and still leads the alternative legal service providers industry it created. He has been recognised as a Top 50 Innovator by the American Lawyer Magazine and won the Financial Times Legal Innovator award for a decade of “sending shockwaves through the legal industry”.

Before pioneering the NewLaw movement, he was an equity partner at BCLP leading its media and technology work.

Clare Hart, Chief Executive Officer, Williams Lea, New York



Ms. Hart is CEO for Williams Lea. She brings more than 25 years of leadership experience to its global business. Responsible for driving profitable growth, enabling a high-performance culture and delivering superior client service and solutions, her expertise across technology enabled business services will be key to driving Williams Lea to its fullest potential.

Prior to joining Williams Lea, she was Chief Executive Officer and member of the Board of Directors of Sterling Talent Solutions, the global leader in background screening with nearly 4,000 employees in 20 offices in 9 countries. While at Sterling, she doubled the size of the company – Revenue and EBITDA – and scaled the business through new leadership driving organizational, cultural and technology improvements.

Prior to joining Sterling, she was President and CEO of Infogroup and a member of the Board of Directors from July 2010 through December 2011.

From 2006 to 2010, she was Executive Vice President, Dow Jones & Company, a News Corporation Company, and President, Dow Jones Enterprise Media Group. She was President and CEO of Factiva, a joint venture between Dow Jones and Reuters, from 2000 to 2006.

She has won numerous awards for leadership and innovation including Inside Market Data's 2010 Hall of Fame, where she was recognized as "The Visionary" and Drexel University's Drexel 100, the University's alumni hall of fame. She also served on the boards of the Direct Marketing Association and the Software and Information Industry Association.

She received a Bachelor of Science in Finance and Computer Systems Management from Drexel University and a M.B.A. from Rider University.

William D. Henderson, Professor and Stephen F. Burns Chair on the Legal Profession Indiana University Maurer School of Law, Bloomington, IN



Professor William Henderson is on the faculty at Indiana University Maurer School of Law, where he holds the Stephen F. Burns Chair on the Legal Profession. His research focuses primarily on the empirical analysis of the legal profession and has appeared in leading legal journals, including the Stanford Law Review, the Michigan Law Review, and the Texas Law Review. In addition to frequent articles in the legal press, his observations on the legal market have been quoted in the New York Times, Wall Street Journal, Los Angeles Times, Atlantic Monthly, The Economist, and National Public Radio. Based on his research and public speaking, he was included on the National Law Journal's list of *The 100 Most Influential Lawyers in America* (compiled every ten years). In 2015 and 2016, he was named the Most Influential Person in Legal Education by The National Jurist magazine.

He has participated in several legal innovation initiatives, including the Institute for the Future of Law Practice (IFLP, "i-flip"), an education nonprofit that combines sophisticated training in modern law practice with paid internships for law students; Lawyer Metrics, an applied research company that helps lawyers and law firms use data to make better operational and strategic decisions (acquired by AccessLex in 2015); and Legal Evolution, an online applied research publication focused on successful legal industry innovation.

Jon Kefaloukos, Senior Enterprise Solution Specialist, Microsoft, Chicago



Mr. Kefaloukos is a passionate technologist who has worked for Microsoft for seven years in various Marketing, Sales and customer-facing technology enablement roles. He created the Microsoft 365 for Legal Deployment vision in October 2020, which has helped law firms worldwide modernize their workplace technology environment with tools like Teams and Office 365, while maintaining data privacy and security with built-in information protection & governance.

He currently serves as a Modern Work Sr. Solution Specialist, supporting U.S.-based law firms and other Enterprise-sized companies in the U.S. with their journeys and unique challenges as it relates to enabling workplace technologies like Office 365, Teams, and Microsoft Security.

Don Keller, CEO & Founder, Joinder, Atherton, CA



Mr. Keller is the CEO and Founder of Joinder, a SaaS collaboration platform that connects companies to their lawyers. Joinder delivers key information about every project in process instantly, anytime, anywhere. Companies and firms benefit from fast, easy access to ongoing projects and completed work records. The result is more value from legal spending, better outcomes and increased efficiency.

He spent his legal career advising high growth technology companies, public companies, venture capital firms and investment banks. He has advised clients on more than 60 public offerings, 75 acquisition transactions and several

hundred venture financings.

He has held many leadership positions at Orrick. He most recently led Orrick's Technology Sector, which is one of the three focus areas (along with energy and finance) for the firm. He is a former member of Orrick's Board of Directors, served as head of the firm's global corporate practice, served as head of the firm's Silicon Valley Office and served as co-head of the firm's diversity efforts.

He also previously served for many years on the Executive Committee of Venture Law Group.

He is a past member of the Board of Overseers of Boston College Law School.

Peter Krakaur, Managing Director, EY Law; Global Law Innovation & Technology Leader, EY, San Francisco



Mr. Krakaur is the Managing Director of EY Law and Global Law Innovation & Technology Leader at EY. He is responsible for technology-enabling legal advisory, legal managed services and legal function consulting practices as EY Law transforms legal service delivery. He leverages his 30 years of legal industry experience to support clients as they consider how process improvement, technology automation, robotics and data improve legal service quality, reduce cost, and manage risk to drive enterprise and customer value.

Prior to joining EY, he served as a senior consultant to corporate legal departments regarding business-enabling legal service delivery and operating model design to transform the business of practicing law.

He also has direct experience managing legal departments and architecting law firm business models. As a legal operations leader for a solar power provider and as a chief knowledge officer for a global law firm, he has extensive experience with law firm pricing & management strategies, contract playbook & template design and management, matter management & billing systems, contract lifecycle management design and support, knowledge management, and legal service technology design and implementation.

Richard Levine, Managing Director, Legal Business Services, Deloitte Tax LLP, McLean, VA



Mr. Levine brings has more than 20 years of experience assisting clients with process enhancement and digital initiatives through outsourced services and technology programs. He has extensive experience supporting legal departments on initiatives involving resource enhancement, process efficiencies, governance, shared service centers, and business measurement. A leader in Deloitte's Legal Business Services practice, he brings a unique perspective in areas including contract management, supply chain optimization, risk and compliance, regulatory change, and legal entity management.

Keith Lipman, CEO, Prosperoware, Bala Cynwyd, PA



Mr. Lipman is the CEO and co-Founder of Prosperoware and a recognized thought leader who is regularly asked to speak about law firm operations and the transformation of the legal services industry. Most recently, he was recognized as an ILTA Vendor Thought Leader of the Year finalist while Prosperoware also was named a finalist for Innovative Solution Provider of the Year. He is one of the instigators behind SALI (Standards Advancement for the Legal Industry), and is credited with creating the concept of Matter Centric Collaboration.

Prior to Prosperoware, he worked in law firms as both a lawyer and an administrative director, later serving as a legal technology consultant to firms. He has authored multiple articles for Bloomberg, InsideCounsel, LTN, ILTA Peer to Peer, and others, and was a contributing author of the books *Corporate Governance Best Practices: Strategies for Public, Private, and Not-for-Profit Organizations*, and *Law Firm KM: Driving Practice Innovation and Redefining Service Delivery*.

He earned his BA, JD, and MBA from Temple University.

Rachita Maker, Vice President & Head of Legal Operations and Compliance, Tata Communications Ltd., Mumbai, India



Ms. Maker heads Global Legal Operations and Compliance at Tata Communications and is responsible for leading the legal department's transformational journey to be more technology and data driven. She is responsible for multiple technology implementations, continuous improvement, and automation projects. She is also responsible for the Compliance division.

She brings more than 19 years of legal industry experience, and prior to joining Tata Communications, she was Vice President – Legal Services at Integreon where she was heading the India Legal Services team of over 1000 legal and non-legal professionals. As her last assignment at Integreon, she spent about six months in

Integreon's London office in a business development role. Prior to Integreon, she was a Director for Ernst & Young's contract lifecycle management solutions team, where she oversaw the development of new solutions, improvements to workflow and quality control processes, the application of Six Sigma methodologies to ALSP engagements, the selection of enabling contract management automation tools and other technologies, and the management of complex client engagements. Prior to Ernst & Young, she consulted with a Dubai-based private equity firm to set up Sri Lanka's first ALSP.

Previously, from 2005 through 2013, she served as a member of the founding management team at Pangea3, where she worked closely with the company's co-CEOs to set up and manage their ALSP operations, processes and systems on an organization wide basis. In this role, her projects and initiatives contributed significantly to the success of the business and included responsibility for the company's corporate abstraction and due diligence division, where she managed a team of over 100 lawyers and oversaw delivery of engagements relating to contract lifecycle management, M & A due diligence and contract data analysis, abstraction and migration.

She is also a thought leader in the legal industry and has curated Legal Operations 1 on 1 series where she discusses pertinent questions relating to legal industry with other leaders. She has also authored a number of blog posts which have been posted on various websites including CLOC.

Maureen Naughton, Chief Innovation Officer, Goodwin, New York



Ms. Naughton joined Goodwin in 2015 as the Managing Director of the Program Management Office. In this role, she oversees the firm's project portfolio and key initiatives to ensure successful delivery, performance and strategic alignment to the firm's goals and objectives. The PMO focuses on maximizing firm investments through project prioritization, organizational strategy, annual business planning and process engineering. In 2018, she took on an additional role leading Litigation Practice Management for the firm. In 2020, she was named the Chief Innovation Officer of the firm. In this role she will help facilitate an innovative culture at Goodwin and will focus on continuous improvement in people, processes, technology and data at the firm.

Prior to joining Goodwin, she served as the Global Business and Operations Director of Legal and Compliance at BlackRock as well as the Americas Operations Officer for Legal and Compliance at Morgan Stanley. She has over 15 years of legal operations experience covering all aspects of global administration and operations including headcount, expense and financial management, strategic planning, vendor management including outside counsel, professional development and talent management, business planning, operational risk, project management and process improvement, governance, cross functional and organizational alignment, technology as well as data management and analytics.

Yvonne Nath, Chief Executive Officer, ALSP Advisor LLC, Cleveland, OH



Ms. Nath is CEO of ALSP Advisor, a law firm strategy consultant with LawVision, and founder of LegalInnovationAggregator.com. She helps law firms navigate the world of ALSPs and ushers all types of legal service providers into the future. Prior to her current roles, she worked her way up from paralegal to director-level roles in AmLaw 20 and 200 law firms.

She helps law firms improve operations, leverage, competitiveness, and margin through the use of ALSPs. Her curated database includes hundreds of service providers -- both well-known and obscure -- that can support the business and practice of law firms. She helps law firms identify whether they have a

compelling business case to use an ALSP and, if so, to recommend ALSPs that will be a great fit for their goals.

She helps lesser-known ALSPs become better-known ALSPs in their target market. She helps ALSPs develop their offerings to provide better value to their law firm clients and to be more competitive for alternative service market share.

She has her master's degree in law firm management and is a frequent contributor to ALM's Legaltech News and other media outlets.

Emily L. Neff, Director – Southeast Region Lead, CBRE, Atlanta



Ms. Neff is the Southeast Solution Leader for the Workplace, Occupancy, and Design practice at CBRE. With a background in finance and strategy, she focuses on helping clients to develop unique workplace transformation strategies.

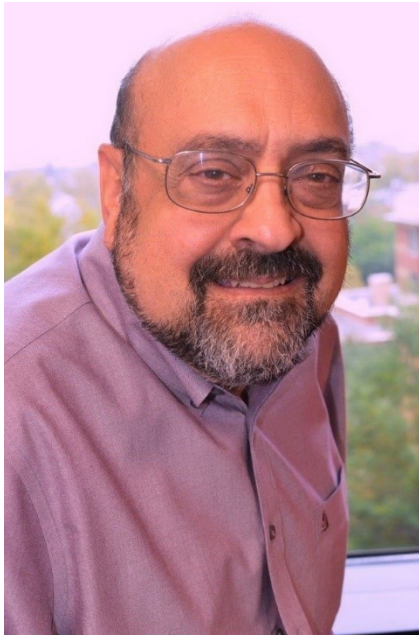
She has been with CBRE since 2011, having spent time working from the San Francisco and Atlanta offices. From 2013 to 2016, she was the Program Manager for CBRE's internal workplace initiative called Workplace360; a program where she delivered strategy and change management services to transition 8,500+ CBRE employees to a new way of working. Through the implementation of Workplace360, she has built experience in not only research, but design strategy, scenario development, change management, move implementation, and post occupancy analysis.

From 2016 on, she transitioned to supporting external clients, and has since been delivering great workplace outcomes for clients through primarily the South and Mid-Atlantic regions. In addition to supporting clients directly, she is part of CBRE's Law Firm Practice Group, participating in shared research on the evolving workplace design and experience in the legal sector. She brings an excitement and passion for challenging the status quo, while also offering empathy and support to employees as they experience change.

Amidst the Covid-19 pandemic, she and her team developed a service offering called Workplace Reset, which offered workplace, design, engineering, occupancy, and cost consulting services to help clients reopen their offices. In partnership with project management, she and team have supported numerous organizations in reopening their offices from May 2020 through present.

She enjoys sharing her passion for Workplace Strategy through story telling of case studies and innovative client outcomes. She has spoken at conferences across the world, including NAIOP (Denver), Greenbuild (Los Angeles), MIPIM (France), IFMA (Orlando), and HR Executive Health and Benefits (Las Vegas).

Stephen Nelson, Executive Principal, The McCormick Group, Arlington, VA



Mr. Nelson is Executive Principal with The McCormick Group's Law & Government Affairs and Law Firm Management practice groups. He conducts partner-level searches and searches for high-level administrative professionals for law firms. He also represents partners looking to change firms and high-level government officials looking to enter private practice.

In addition, he serves as a consultant for law firm merger planning, practice area expansion, and the interplay between marketing, public relations, and recruiting. He is a Fellow with the College of Law Practice Management, and is a regular speaker for the Practising Law Institute. He is the former Managing Editor of the Washington, D.C.-based Legal Times and the Director of the Washington office of Prentice Hall Law & Business.

Linda Netsch, General Manager, FLEX by Fenwick & West LLP, San Francisco



After many years of working extensively with Fenwick as a consultant, Ms. Netsch now serves the general manager of FLEX by Fenwick. FLEX is an innovative client service offering providing interim in-house counsel for the firm's clients and other companies in need of legal staffing. In this capacity, she is responsible for managing the strategy and operations for FLEX and leading the FLEX team. She is a Lecturer on negotiations at Harvard and Stanford law schools as well.

She is also the founder of Align Consulting, providing executive education, consulting, and mediation services for domestic and international clients in law, technology, banking, energy, healthcare and government. She also served as an advisor to entrepreneurs at a Silicon Valley startup incubator and as a member of Golden Seeds, an early-stage investment firm. She previously practiced law with an entertainment law firm in Los Angeles and with the U.S. Postal Service as an employment and Alternative Dispute Resolution attorney. Prior to private practice, she was an officer in the U.S. Air Force and on the faculty of the Air Force Academy.

Melissa C. Prince, Chief Client Value and Innovation Officer, Ballard Spahr LLP, Philadelphia



Ms. Prince serves as the firm's Chief Client Value and Innovation Officer and sits on the firm's Management Committee and Expanded Board.

She focuses on listening to client needs and understanding how each client's business operates in order to make the connection between value and innovation. She oversees the firm's Client Value and Innovation program, which includes more than 20 business professionals focused on creating a customized experience for each client.

She is a frequent speaker, presenter, and author on legal operations topics. She recently launched the Ballard360 Insider blog, which is focused on delivering insights and best practices in legal operations. Under her leadership, the firm was named to the Financial Times' Most Innovative Law Firms Business of Law, an innovation "Mover and Shaker" by BTI Consulting, and a finalist for the American Lawyer Industry Awards in the best law firm/client team and best business team categories.

Before coming to Ballard Spahr, she held similar roles at two Am Law 25 firms. She is an attorney who, before leaving private practice, managed complex commercial litigation matters. She is a Six Sigma Green Belt, Certified Legal Project Manager, ALPP and ALPM.

Thomas B. Romer, Shareholder and Head of Recurve, Greenberg Traurig LLP, Denver, CO



Mr. Romer is a Shareholder and Head of Recurve at Greenberg Traurig. He loves to negotiate deals. He believes that every transaction presents as an opportunity for parties to find common ground and enjoys helping his clients capitalize upon that opportunity. When obstacles or complications arise, he embraces the challenge of developing unique and innovative strategies that protect his client's interests but also allow the transaction to move forward. Most importantly, he enjoys delivering value to his clients by managing an effective and efficient deal process and by negotiating and drafting transaction documents that clearly and concisely reflect the business deal.

His approach to delivering value through the deal process has allowed him to develop an international corporate transactional practice representing public companies and large private equity firms in complex mergers and acquisitions and securities offerings.

Rob Stote, Director of Client Services, North America, BigHand, New Brunswick, Canada



Mr. Stote has over 20 years of experience in the legal software industry with expertise in law firm process, billing, and practice management systems.

In 2001, he joined Whitehill and while there he was a senior software developer and architect, and led the development team for their Billing Software and Business Process Management software for the legal and insurance markets. In 2005, he transitioned to the role of Product Manager and began to oversee a portfolio of products specializing primarily in Finance and Financial Systems. In 2006, he was a key member of the senior management and transition team as Oracle acquired the Whitehill Business and formed Legal Global Business Unit at Oracle.

While assuming the Director of Product Management at Oracle he helped guide the LGBU both in sales, operations, and product development. As part of the senior management team in 2011 he guided the Oracle divestiture of the Legal Business Unit, from Oracle to Thomson Reuters.

While at Thomson Reuters Elite he assumed the role of Product Manager for solutions focusing on the Proforma/Pre-Bill Process, E-Billing and Document Production. In his last two years at Thomson Reuters, he transitioned to the Product Manager role for Firm Central, a cloud-based Time & Billing system offered by Thomson Reuters – and help bring that product to market before departing in 2016.

In April of 2016 - he joined DWReporting as its Director of Operations, and Principal to formally launch the North American Offices. In the first two years of operations in North America, DWReporting grew from 1 to 7 employees and gained dozens of clients across its product lines, with a focus on financial performance, profitability, and matter pricing.

In 2018 DWReporting was acquired by BigHand – where he has transitioned into the Director of Client Solutions and continues to oversee a portfolio of products specializing in both Financial and Operational performance.

Martin T. Tully, Partner & Co-Founder, Actuate Law LLC, Chicago



Mr. Tully is a founding partner of Actuate Law, LLC in Chicago. He is a veteran trial lawyer with over 30 years of national experience representing companies and individuals in complex commercial litigation concerning a broad array of fields and industries. Empowered by his commercial litigation practice, he is nationally recognized for his knowledge and experience in the fields of electronic discovery, information governance, and data security/data privacy. His expertise helps clients to stay ahead of the curve in each of these fields with respect to developing law, technology, and best practices, whether in the context of active litigation and regulatory matters, or in seeking to avoid them. He is also adept at leveraging both technology and strategic partnerships with technologists to achieve client objectives.

He advances thought-leadership in data law as Chair of the Steering Committee of the Sedona Conference Working Group on Electronic Document Retention and Production (WG-1), as an active member of the Sedona Conference Working Group on Data Security and Privacy Liability (WG-11), the 7th Circuit Council on eDiscovery and Digital Information, the ABA Section of Litigation, Privacy and Data Security Committee, and the International Association of Privacy Professionals (IAPP), as well as a director-at-large of the Chicago Chapter of the Association of Certified E-Discovery Professionals (ACEDS). In addition, he has published and presented extensively on the topics of e-discovery, information governance, cybersecurity, data privacy, and legal technology; is among a select group of lawyers in the world ranked for Litigation: E-Discovery & Information Governance by Chambers USA: America's Leading Lawyers® and Chambers & Partners Global®; and he has been acknowledged by Who's Who Legal® as being "steps ahead of his competitors" and "widely regarded for his 'superior knowledge' of electronic discovery and information governance."

He is also a founder and the Managing Member of Quintec LLC, a legal tech subsidiary powered by Actuate Law. Quintec's mission is to design and build legal expert systems and other AI-driven tools that automate the delivery of legal and compliance services to meet client and industry demand for more efficient, scalable, and cost-effective solutions.

Tara Waters, Partner, Head of Advance Digital, Ashurst, London



Ms. Waters is a partner at Ashurst LLP and is Head of Ashurst Advance Digital, the technology arm of their NewLaw division, Ashurst Advance. She is a "non-traditional" lawyer; she worked in technology development for 7 years before switching careers, and in her current role she has been able to merge her experience to focus on how to best leverage technology to improve and evolve the delivery legal services and solutions for clients.

While her focus is on technology development and implementation, this is achieved through the broader lens of disruption and innovation and the application of new business models and ways of working. In addition to leading Ashurst Advance Digital, she maintains a legal practice focused on the technology sector and advising high growth companies on a full range of transactional matters. She is Head of Ashurst's High Growth & VC team and Co-Head of the firm's FinTech and Distributed Ledger & Crypto Assets practices.

She has written several articles and speaks regularly at international industry events on both NewLaw topics and emerging technologies. She was named on Innovate Finance's Women in FinTech Power List 2017, was shortlisted for Legal Innovator of the Year at the 2019 FT Innovative Lawyers Awards and was named to The Lawyer's Hot 100 2020. She is also a Techstars All-Star Mentor.

Amy Wegener, Chief Practice Innovation Officer, Paul Hastings LLP, Los Angeles



Ms. Wegener is the Chief Practice Innovation Officer at Paul Hastings LLP and is based in Los Angeles. She is currently responsible for the creation, strategy and growth of the Practice Innovation and Legal Solutions Department at the firm, with her scope including legal project management, practice management, knowledge management, legal research, e-discovery, alternative legal staffing models, and the deployment of innovative technologies.

She received an MLIS from San Jose State University and a BA from Bucknell University. She has also obtained certifications in project management, e-discovery, design thinking, process improvement methodologies, as well as international business and trade. She serves as an Adjunct Lecturer at UC Irvine School of Law and co-teaches a class on the impact of technology on the legal profession titled Pushing the AI Frontier.

She was recognized by the Financial Times in 2020 as a top Practice and Business Leader in the Global Legal Sector. Additionally, Paul Hastings was recognized by the International Legal Technology Association as the Most Innovative Law Firm of 2020 as a result of her department's efforts.