



THOMSON REUTERS™

LEGAL EXECUTIVE INSTITUTE

The Thomson Reuters Legal Executive Institute

presents

The 2017 Emerging Legal Technology Forum:
Accelerating Innovation Across the Profession

September 21, 2017

The Thomson Reuters Customer Centre
Thomson Reuters Corporate Offices
333 Bay Street, 29th Floor
Toronto, ON

Co-Chairs

Mark Tamminga, *Partner & Leader of Innovation Initiatives*, Gowling WLG (Canada) LLP

Program (all times local)

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

9:00am – 9:15am **Opening Remarks**

9:15am - 10:15am **Prometheus Unbound: On “Chat Bots,” Robot Lawyers & Ongoing Access to Justice**

2016 was another year of incremental growth for legal technology. Thanks to the growing popularity of legal apps and so-termed “chat bots,” calls for improved access to justice through platforms such as DoNotPay or the now defunct Rechtwijzer 2.0 are fast becoming a reality. Across the legal industry, in-house and law firm practitioners are embracing this latest wave of innovation to explore ways in which the delivery of legal services can be addressed expeditiously. This opening conversation offers a lively, wide-ranging take on how industry disrupters, law firms and corporate legal departments are seizing upon calls for change.

Moderator:

Jose Fernando Torres Varela, *Fellow, Center on the Legal Profession & Legal Design Lab*, Stanford Law School

Panelists:

Dennis C. Garcia, *Assistant General Counsel*, Microsoft Corporation

Fernando Garcia, *General Counsel, Government Affairs & Corporate Secretary*, Nissan Canada, Inc.

Joshua Lenon, *Lawyer in Residence*, Clio
Kristen Sunday, *Co-Founder & Chief Operating Officer*, Paladin PBC, Inc.

10:15am – 10:30am

Break

10:30am - 11:30am

The Pace of Progress: Assessing Innovative Design, Technology & Process in Law Firms & Corporate Legal Departments

The adoption of new technology in law firms and corporations has had a significant impact on legal services. Savvy business executives understand the lengthy shadow technology casts on in-house operations and client behaviors across a wide array of tasks. This discussion examines the various ways law firms and legal departments are incorporating smart technology as part of a broader strategic plan. Our panelists will offer detailed guidance around the transformative impact investments in technology have had from an operational, financial and talent perspective.

Moderator:

Carlos Gamez, *Senior Director, Innovation – Legal*, Thomson Reuters

Panelists:

Rochael Adranly, *General Counsel & Legal Design Lead*, IDEO LP

William T. Caraher, *Chief Information Officer*, Von Briesen & Roper, s.c.

Kenneth Heaps, *Chief Information Officer*, Latham & Watkins LLP

Josh Kubicki, *Chief Strategy Officer*, Seyfarth Shaw LLP

Meredith L. Williams, *Chief Knowledge Management Officer*, Baker, Donelson, Bearman, Caldwell & Berkowitz, PC

11:30am - 11:45am

Break

11:45am - 12:45pm

Breakout Discussions

In these two facilitated discussions, Forum participants are invited to share practical ideas with industry colleagues and observers. Attendees interested in early stages of technological adoption are encouraged to attend Breakout #1. Attendees interested in latter stages of adoption are encouraged to attend Breakout #2.

Breakout #1:

Leading Change: Defining Strategic Investments in Legal Technology

How do you determine which technology vendor or technological investment is right for your business? For both law firm and in-house executives, understanding engagement costs, resource requirements, and organizational needs are critical steps toward defining a strong strategic plan. Leveraging best practices and lessons learned, this session delivers practical guidance for mastering the initial research, vetting and selection process for accelerating innovation across the enterprise.

Moderator:

William Fowler, *Vice President & General Counsel*, Profit Recovery Partners

Panelists:

Paul Belanger, *Partner & Chair, Innovation Council*, Blake, Cassels & Graydon LLP

Christopher J. Fowles, *Partner & Head of Legal Services Centre*, Torys LLP

Theo C. Ling, *Partner & Principal, Whitespace Legal Collab*, Baker McKenzie LLP

Bishu Solomon, *Director, eDiscovery Solutions Canada*, EPIQ, a DTI Company

Breakout #2:

Chain Reaction: Managing the Strategic Implementation of Legal Technology

Once the decision has been made to invest in a given technology, understanding both the short- and long-term ramifications of product implementation can be daunting. Picking up where “The Pace of Progress” left off, this tactical discussion offers robust insight into integrating disparate systems, establishing end-user expectations, and managing enterprise risk.

Moderator:

Kimberly A. Stein, *Manager, Knowledge Management*, Thomson Reuters Legal

Panelists:

James W. Anok, *Senior Consultant*, Fireman & Company

Laurence Liss, *Chief Information Officer Emeritus*, Blank Rome LLP

Natalie Munroe, *Head, Osler Works – Transactional*, Osler, Hoskin & Harcourt LLP

Dera J. Nevin, *eDiscovery Counsel & Director of eDiscovery Services*, Proskauer Rose LLP

Ginevra Saylor, *National Director, Knowledge Management*, Dentons

12:45pm - 1:45pm

Networking Luncheon

1:45pm - 2:45pm

Paradigm Shift: Examining the Blockchain Business Revolution

Blockchain technology is poised to transform the contemporary business landscape. Already making inroads across a wide swath of sectors, blockchain will force both in-house and outside counsel to cultivate a thorough understanding of this nascent technology in order to better service clients. This panel addresses three crucial questions for the 21st-century lawyer: What is blockchain? How is it impacting clients? And how might current (or forthcoming) technological advancements impact the legal profession?

Moderator:

Joseph Raczynski, *Entrepreneur & Founder*, Joe Technologist; *Manager, Technical Client Management – Legal*, Thomson Reuters

Panelists:

Robert E. Craig, *Chief Information Officer*, Baker & Hostetler LLP

Stephen P. Kirby, *Senior Counsel*, IBM Canada

Casey Kuhlman, *Chief Executive Officer*, Monax.io

Theodore (“Ted”) J. Mlynar, *Partner & Chair, Blockchain-Smart Contracts IPMT Working Group*, Hogan Lovells US LLP

Houman B. Shadab, *Co-Founder*, Clause.io; *Professor of Law*, New York Law School

2:45pm - 3:00pm

Afternoon Break

3:00pm - 4:00pm

The Final Frontier: Advancing Educational Reform Around Legal Technology

Although traditional educational curricula once helped law students identify problems in the surrounding world, the impinging forces of globalization, scientific advancement, and geopolitical tumult have underscored a profound disconnect between business needs in the current economy and the preparedness of today’s law school graduates. This closing session offers a comprehensive take on where formal education around emergent

technology fits within academic discourse. Our illustrious panel will ponder how best to prepare the next generation of lawyers to handle the challenges ahead.

Moderator:

David Curle, *Director, Market Intelligence & Thought Leadership – Legal*, Thomson Reuters

Panelists:

Monica Goyal, *Founder, My Legal Briefcase & Aluvion Law; Adjunct Professor*, Osgoode Hall Law School

Edward Iacobucci, *Dean & James M. Tory Professor of Law*, The University of Toronto Faculty of Law

Daniel W. Linna, Jr., *Director of LegalRnD & Professor of Law in Residence*, Michigan State University College of Law

Chris Wedgeworth, *Co-Founder*, Hotshot

4:00pm - 5:00pm

Networking Reception & Legal Technology Fair

Please join us for cocktails and live, interactive demos from some of the most innovative start-ups in the industry.