



Thought Leadership Conference – Wednesday, October 18, 2023

Morgan Lewis & Bockius LLP
101 Park Ave, New York, NY 10178

AGENDA

8:00 – 9:00 am

Registration and Breakfast

8:30 – 9:30 am

The Right Team for the Job: Criteria for Selecting an eDiscovery Service Provider

Sponsored by: TCDI

- David Varacchi, TCDI
- Michael W. Bohner, Cleary Gottlieb Steen & Hamilton LLP
- Michael Scavelli, Steptoe
- Aulden Burcher-Dupont, Kirkland Ellis
- Denise Blackhouse, Littler

Listen to a panel discussion on how law firms and corporations decide who they will work with for litigation, investigation, breach, cross border, government, high profile, and other types of matters. Additionally, we will discuss: How do you weigh outsourcing a particular matter vs keeping it in house? What eDiscovery tools are important to your team? How does strong PM support compare to the tools your firm prefers to use? How do you measure the quality of support from vendors? Is pricing the most important consideration? Do you put every project out for bid? Is a vendor's ability to perform custom engineering a key factor in choosing a provider? How do you stay abreast of all tech and service offerings by the dozens of providers? How would you handle a situation where you are told to work with one provider, but you prefer another?

9:45 – 10:45 am

TRACK 1: Gen AI May Be a Game-Changer for Legal – But Change Management Will Determine its Success

Sponsored by: Everlaw

- Chuck Keller, Everlaw
- Adina Newman, New Legal Ops
- Ashley A. Miller, Capgemini

Gen AI is a shiny new object in science, business, and law. It holds great promise for transforming how we interact with our work. But it is not a given that it or any new program or technology succeeds in the workplace without the discipline of change management. The approach is critical no matter what the endeavor –



corporations, legal operations, law firms, technology development, or service organizations. Learn what is necessary to:

- Develop a vision and roadmap from current to future state
- Generate buy-in and sponsorship for a successful program
- Communicate frequently and via multiple channels to generate awareness
- Understand the impacts of change on hiring, upskilling, and career advancement
- Build in reinforcement to manage resistance and to sustain long-term change

Breakout Track 2: Navigating the Digital Maze: an interactive Session on eDiscovery Case Law & Trends in 2023

Sponsored by: *eDiscovery Assistant*

- Daryl Greene, eDiscovery Assistant

Bring your laptop or mobile device and join us as we delve into the ever-evolving world of ediscovery case law, where we've seen more than 4000 new discovery decisions in 2023. We'll explore the most recent developments and issues that you'll want to pay attention to for your clients, and give you an opportunity to challenge your ediscovery knowledge and technology through an engaging interactive game called eDiscovery Explorer.

11:00 – 12:00 am

TRACK 1: The Long and Winding Road to Producing Short Form Messages

Sponsored by: *Morgan Lewis*

- Elizabeth Gary, Morgan Lewis
- Bansari Mehta McCarthy, Morgan Lewis
- Thomas F. Mullane, RTX

A discussion of the challenges of short-form message discovery, including a review of recent case law, strategy decisions, negotiation tactics, collection technology, and practical tips for collecting, reviewing and producing short form messages.

Breakout Track 2: Mastering the Text Message Review Process: A practical guide from Ingestion to Production

Sponsored by: *vDiscovery*

- Nikolai Pozdniakov , vdiscovery
- Daniel Barak, vdiscovery

Please join Nikolai and Danie as they discuss steps of a typical document review workflow that involves text messages. This discussion will cover real world technical problems and solutions that you may encounter. Presenters will share not just theoretical solutions but will discuss real world software that can handle multitude of problems associated with text message review.

12:00– 1:00 pm

Lunch & Networking

1:00 – 2:00 pm

**TRACK 1: Modern Communications, Data and Discovery:
Leveraging All Available Data to Tell the Story**

Sponsored by: *CloudNine*

- Rick Clark, CloudNine
- Jeaneen Kappell, SEC
- Genevieve Moreland, Crowell & Moring
- Rick Wilson, Gimmel
- Ashley Picker, Day Pitney LLP

In legal discovery, we live in the world of documents, reviews, and procedures, but with modern data infusing with traditional eDiscovery processes, we see major breakdowns in efficiency and workflows. Join industry thought leaders as they discuss preferred ways to manage Slack, smartphones, social media, geolocation, and other modern data types.

**Breakout Track 2: Investigating fraud cases more efficiently using
compliance analytics, machine learning, and AI.**

Sponsored by: *JS Held*

- Ken Feinstein , JS Held
- Jonathan Chan, JS Held

You are familiar with the wide variety of tools for analysis and review of unstructured data on your investigations. But what about the structured data that often tells a critically important part of the story (the “what”), and also provides quantitative insights on damages (the “how much”)? J.S. Held’s investigative data analytics experts will walk through how they utilize KonaAI, a technology platform built for structured data, to produce case-changing insights in far less than time than traditional methods. Need not be a SQL guru to attend!

2:10 – 3:10 pm

TRACK 1: Exploring the Ethics of AI in the Legal Realm

Sponsored by: *HaystackID*

- Kevin Clark, HaystackID
- Kassi Burnes, King Spalding
- Melissa Heidrick, Norton Rose Fulbright
- David Cohen, Reed Smith

This panel delves into the pivotal ethical considerations that surface when implementing AI within the legal sector, highlighting issues of bias, fairness, accuracy, and privacy. We'll also discuss the overarching themes of legal responsibility and accountability in the use of AI. Join us as we unpack actionable steps lawyers can take to address and navigate these complex challenges.

Breakout Track 2: Revolutionizing Data Management: The Synergy of IG and eDiscovery

Sponsored by: *Infinium*

- Charles Lavallee, Infinium
- Brian Wolfinger, Infinium
- Tom Skelley, Infinium

Discover the future of data management with Infinium 4iG™! Say goodbye to outdated and expensive data collection methods and welcome an innovative solution that efficiently handles all your data, from legacy sources to modern platforms like Slack and Teams. Learn how this ground-breaking technology empowers you to manage compliance and eDiscovery seamlessly in-place, eliminating risks, reducing costs and boosting efficiency.

3:20 – 4:20 pm

TRACK 1: Data Preservation in the Modern Tech Stack

Sponsored by: *Disco*

- Rian Kennedy, Disco
- Brian Lejfer, Disco
- Manfred Gabriel, Holland & Knight
- James Sherer, Baker Mackenzie

Corporate legal departments are faced with the growing concern around modern communication methods their companies use in the normal course of business. This session will discuss these problems, the legal requirements, and the solutions to ensuring modern data types are considered during preservation efforts.



Breakout Track 2: Defining Technology Competence: It's Been over 10 Years and We Still Don't Have an Answer?

Sponsored by: **ACEDS**

- Mike Quartararo, ACEDS
- Ashley Picker, Day Pitney LLP
- Ross Gotler, Paul Weiss Rifkind Wharton & Garrison LLP
- Rachelle Rennegal, Pillsbury Winthrop Shaw Pitman, LLP

Beginning in 2012, the American Bar Association – and since then, 40 state bar associations – have required that lawyers be technologically competent. These organizations did not clearly define “technology competence,” and it remains unclear if there are any mechanisms for actually encouraging or enforcing such a requirement. Join us for this panel discussion in which lawyers who are technology competent will offer their definitions of technology competence, while at the same time exploring strategies and tactics that attendees may use within their own organizations to help meet the technology competence requirement.

4:30 – 5:30 pm

Generative AI and the Future of eDiscovery

Sponsored by: **Relativity**

- Cristin Traylor, Relativity
- Jeremy Pickens, RedgraveData
- Jason Lichter, Troutman
- Danielle Diette, CDS

Is GPT-powered review ready for prime time? Or do we need to pump the brakes? This panel will discuss various experiments conducted on real-life data and whether generative AI can help accelerate document review. We will cover the challenges of industry adoption and ways we can all get prepared for this innovative technology.

5:30 – 7:30 pm

Happy Hour & Networking

Sponsored by **The Master's Conference**

Agenda Subject to Change

Additional Panelists and Speakers to be Announced

