



LEGAL PROCESS OUTSOURCING™

EXAMINING LEGAL OUTSOURCING STRATEGIES AND
DECIDING WHAT FITS BEST FOR YOUR COMPANY

February 14-16, 2011 | New York, NY

Why attend IQPC's LPO Summit?

- **Gain a clear understanding** of the legal outsourcing options available to your company
- **Learn the key factors** to consider before making a decision to outsource
- **Understand the scope** of required conflict checks in an outsourcing arrangement
- **Strengthen communications** and clarify expectations between your company and the outsourced entity
- **Explore Different Contract Management Outsourcing Models** and implement proper controls to ensure the compliance of outsourced contracts
- **Address the scope and content** of required confidentiality agreements – and their limitations

Co-Located
with IQPC's



**Developing Tactics To Reduce The Complexity And
Costs Of eDiscovery In A New Regulatory Era.**

Attend both events for one low price. See Page 6 for further details.

Featuring a Distinguished Speaker Faculty from Organizations such as:

General Electric Company
Chrysler Latin America
Microsoft
Pfizer
DuPont
Clifford Chance
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LEGAL PROCESS OUTSOURCING™

February 14-16, 2011
New York, NY

Dear Colleague,

Welcome to IQPC's Legal Process Outsourcing Summit – a unique event that will bring together in-house counsel, project managers, law firm experts, and solution providers to examine the burgeoning LPO industry. The continued growth of the Legal Process Outsourcing market comes as no surprise to anyone. With advanced technology and tight budgets in a constrained economy, companies are exploring more cost-efficient alternatives for high quality legal work. Heightened regulatory and compliance requirements demand in-house legal to address a larger portfolio of legal tasks. At the same time, CEOs and CFOs are putting tremendous pressure on their employees to cut spending and given the exorbitant cost of legal spend, in-house counsel are feeling the pressure more than most.

Although legal outsourcing is not a fit for every law firm and in-house legal department, the legal community simply cannot ignore the expansion of the LPO market. This event will take an honest look at all sides of LPO and address the challenges, ethics, implications, and strategies of legal outsourcing.

Highlighted topics include:

- ✓ Understanding dynamics and propriety of LPO
- ✓ Developing a solid understanding of the fundamentals of LPO negotiation
- ✓ Performing due diligence to ensure that work performed and those performing the work comply with applicable rules of professional conduct and other laws and regulations
- ✓ Strengthening communications and clarifying expectations between your company and the outsourced entity
- ✓ Confronting important chain of custody issues that arise in the course of litigation
- ✓ Mitigating risk through effective contract provisions and addressing confidentiality and security provisions

Attending this Summit will help you decide if and where LPO may fit into your organization's legal and fiscal strategy. Don't miss this opportunity to learn, benchmark and network with leading industry experts and brainstorm innovative and workable solutions to cut costs and streamline your legal processes.

We look forward to seeing you in February in New York City and welcoming you to our LPO Summit!

Best Regards,

Samantha King
Program Director
Samantha.King@iqpc.com

P.S. Don't miss the highly interactive and informative pre-conference workshops - see page 3 for details

In house Directors and VPs from the following departments:

- Litigation
- General Counsel
- IT/Legal Technology
- Outsourcing
- Regulatory Affairs
- Compliance
- Risk Management
- Human Resources

Outside Counsel:

- Domestic Law Firms
- Foreign Law Firms
- Law Firm Knowledge Centers

LPO Providers:

- Legal Outsourcing Consultants

About the Organizer

Legal IQ a division of IQPC  **Legal IQ**, a division of IQPC, is an online community dedicated to providing members of the legal profession with information regarding current legal and regulatory issues. Legal IQ offers legal information resources such as podcasts and presentations, as well as events such as webinars, conferences and summits. At Legal IQ, lawyers and attorneys have the opportunity to network with peers within the legal profession through Q&A as well as group membership. Legal IQ is the premier informational resource for legal professionals of all levels of experience and areas of practice.

Sponsorship and Exhibition Opportunities

Sponsorships and exhibits are excellent opportunities for your company to showcase its products and services to high-level, targeted decision-makers attending the **LPO Summit** event. **Legal IQ and IQPC** help companies like yours achieve important sales, marketing and branding objectives by setting aside a limited number of event sponsorships and exhibit spaces, all of which are tailored to assist your organization in creating a platform to maximize its exposure at the event.

For Registration Information and to Download the Complete Brochure Visit www.legaloutsourcingsummit.com or Call 1-800-882-8684 For sponsorship opportunities, please contact Georgia Foster at 212-885-2799 or at sponsorship@iqpc.com



WORKSHOP DAY

Monday, February 14, 2011



9:00am – 11:00am

(Registration 8:45) Breakfast and Coffee will be served

Gaining the Right Information and Tools to Make an Informed Legal Outsourcing Decision

Many legal organizations are aware of legal outsourcing but have questions about which operations to outsource, how to select a vendor, and how to optimize operations to get the most from outsourcing. This workshop outlines a methodology to help you understand the factors to consider when making the decision to outsource and create a framework for entering into the LPO market.

You will learn to:

- Understand, evaluate and mitigate the risks inherent in outsourcing to a third party;
- Analyze the appropriateness of LPO and legal globalization;
- Identify and assess the key considerations when evaluating an LPO initiative;
- Evaluate the strengths and weaknesses of LPO vendors;
- Understand the various legal outsourcing models and options; and
- Understand the various operational models appropriate to govern outsourcing relationships.

You will benefit from:

- A clear understanding of the outsourcing options available to your company

- A methodology to help guide your outsourcing decision
- A determination of the best fit for your company's legal outsourcing needs

About your workshop leader:

Matthew Sullivan, is a founder and principal at Red Bridge Strategy, Inc. He provides consulting and advisory services to legal departments and law firms, and specializes in legal process outsourcing. He has 20 years of experience serving businesses in the capacities of attorney, management consultant and technologist. In addition to his experience with prominent consulting and law firms in the U.S., Matt lived in Pune, India, for two years, where he managed the risk management & regulatory compliance practice for a global outsourcing company. He is an expert in the legal outsourcing industry, and has visited most of the major Legal Process Outsourcing (LPO) vendors, met their workers and executives, and reviewed their Indian operations. Matt holds an undergraduate degree in computer science, graduate degrees in business and law, and is a member of the Massachusetts Bar.



12:00 – 2:30

(Registration 11:45) Lunch included

The Fundamentals of LPO Negotiation

Negotiation tactics vary depending on the company, outsourcing entity, outsourcing tasks, and objectives. Regardless of the type of agreement, companies must structure an agreement so that it achieves their objectives and at the same time guards against disclosure of protected information, data leaks and other risks. This workshop will address the nuts and bolts of LPO negotiation and give you a solid baseline to begin your negotiations.

What you will learn:

- Identifying potential conflicts that could arise in an outsourcing relationship

- Mitigating risk through effective contract provisions
- Addressing confidentiality and security provisions

How you will benefit:

- Develop a solid understanding of the fundamentals of LPO negotiation
- Learn effective contractual strategies to mitigate risk

Workshop Leader:

Lucy Bassli
Senior Attorney in Legal and Corporate Affairs Department
Microsoft



3:00 – 5:30

(Registration 2:45)

Insourcing versus Outsourcing: Challenges and Opportunity in eDiscovery

To manage costs and increase control over the discovery process, many financial institutions and law firms are bringing most or all of their e-discovery in house. However, the reality is that managing the complexities and technical requirements of e-discovery can be a logistical nightmare. Legal and IT department systems and protocols must be properly coordinated. Moreover, capital investment, staffing, and document management policies must be reconsidered. In this workshop, you will learn from a leading practitioner in the e-discovery industry who has successfully managed the process of bringing e-discovery in-house. Cathleen Peterson, Director of Document Review Services at Orrick Herrington Sutcliffe, will tell us about creating the unique West Virginia "insourced" document review unit and lead a discussion on bringing e-discovery in-house.

What you will learn:

- Pros and cons of outsourcing and insourcing.
- Finding qualified reviewers at the right price.

- Training staff on e-discovery.
- Domestic vs. international document review services.
- Organizing your team to facilitate communication between counsel and reviewers.

How you will benefit:

- Gain a practical understanding of the logistics of in-house e-discovery.
- Defend the expense of establishing an in-house staff.
- Learn how to find and train qualified staff, resulting in cheaper and more efficient discovery.

Workshop Leader:

Cathleen Peterson
Director of Document Review Services
Orrick Herrington Sutcliffe LLP



CONFERENCE DAY ONE

Tuesday February 15, 2011

8:00 **Registration and Coffee**

8:30 **Welcome Address and Chairperson's Opening Remarks**

8:45 **Important Ethical Considerations When Deciding to Outsource**

The ABA and various state bars have issued opinions on ethical issues related to outsourcing, but many ethical issues remain unresolved. Companies and firms entering into outsourcing agreements need to be sure that they are in compliance with ethical rules including those governing confidentiality, conflicts, disclosure to clients, billing practices, and the unauthorized practice of law. This presentation will help attendees to:

- Understand the scope of required conflict checks in an outsourcing arrangement
- Address the scope and content of required confidentiality agreements – and their limitations
- Perform due diligence to ensure that the work performed and those performing the work to comply with applicable rules of professional conduct and other laws and regulations

Anthony E. Davis, Partner, **Hinshaw & Culbertson LLP**

9:30 **Is Outsourcing Right for Your Company?**

Outsourcing legal processes does not fit every company's business model. The decision to outsource not only differs from company to company but also may depend on the specific project or case within a company. This session will help you determine if, when, and how to outsource.

- Examining the scale of outsourcing processes and what works best for your company
- Determining whether to approach outsourcing decisions as a company-wide decision or on a case by case basis
- Understanding the wide range of outsourcing providers and model options
- Exploring the cost benefit analysis for keeping work within U.S. borders especially considering the pool of domestic unemployed lawyers

José Eduardo Salgado, General Counsel, **Chrysler Latin America**

10:15 **Networking Break**

11:00 **Case Study: Implementing a Captive Off-Shore Knowledge Center**

Don't miss this session led by Clifford Chance's Mark Ford, Director of the firm's India Knowledge Center. Mark will discuss the experience of setting up an offshore captive operation and talk about some of the challenges faced along the way and how they overcame them.

- Addressing the barriers to adoption of the knowledge center
- Overcoming cultural issues when conducting business off-shore
- Financial considerations impacting the establishment of an off-shore captive

Mark Ford, Director of Knowledge Center in India, **Clifford Chance**

11:45 **Maximizing the Quality of Outsourced Legal Work**

It is crucial for counsel to vet outsourcing providers to guarantee the outsourcing staff is well trained and producing quality work. If done correctly, cutting costs will not lead to negatively impacting quality. In fact, many LPO's provide access to very specialized and high quality work that your company could not produce in such an efficient and cost-effective way.

- Understanding the management and training structure of your legal services provider
- Strengthening communications and clarifying expectations between your company and the outsourced entity
- Managing expectations of internal clients

Lucy Bassli, Senior Attorney in Legal and Corporate Affairs Department, **Microsoft**

12:30 **Networking Lunch**

1:30 **Best Practices in Litigation Support Outsourcing**

Companies can cut major costs and free up significant staff time and resources by outsourcing litigation support for large matters. In this session you will hear from advanced litigators who have managed outsourced projects throughout the litigation process.

- Confronting important chain of custody issues that arise in the course of litigation
- Determining the scope of the project during the LPO negotiation phase
- Maintaining attorney client privilege and other tactical concerns

Everett Upshaw, IPR Legal Counsel, **Nokia**

William McComas, Partner, **Shapiro Sher Guinot & Sandler**

2:15 **Exploring Different Contract Management Outsourcing Models**

Companies handling a large volume of contracts can save significant time and money by outsourcing contract negotiation and management. Join this panel to learn about different outsourcing models and how companies are cutting costs and streamlining the contract process.

- Learning the right model to properly outsource your company's contract needs
- Managing the internal workflow and implementing proper controls to ensure the compliance of outsourced contracts
- Making sure the outsourced team is trained well to handle contracts in accordance with your company's templates, standards, relevant law and regulations

Alejandra Spinetti, Compliance & Contracts Strategy Lead for the R&D Contracts & Outsourcing, **Pfizer**

Lucy Endel Bassli, Sr. Attorney, Legal and Corporate Affairs, **Microsoft**

3:00 **Networking Break**

3:45 **The Art of Negotiating a Solid Outsourcing Agreement**

Whether it is a company-wide contract or a case by case arrangement, a comprehensive agreement between your company and the outsourcing entity is paramount to successful execution of legal processes.

- Identifying potential issues that could arise in an outsourcing relationship
- Being prepared for hiccups down the road
- Altering your negotiation strategy depending on the tasks being outsourced

Robert M. Finkel, Partner, **Milbank Tweed**

Nicholas Smith, Associate, **Milbank Tweed**

4:30 **Exploring Outsourcing Opportunities within the United States**

While many law firms and companies send work off-shore, domestic facilities enable companies to outsource to U.S. lawyers within domestic facilities. On-shore legal process centers provide an attractive alternative for lawyers and clients who do not wish to send legal work off-shore.

- Identifying various on-shore alternatives available for your company's legal needs
- Learn how General Electric reduces their legal spend through domestic outsourcing
- Comparing the benefits and risks of on-shoring vs. off-shoring legal processes

Janine M. Dascenzo, Associate General Counsel, **General Electric Company**

5:15 **Chairperson's Closing Remarks and Close of Day One**



CONFERENCE DAY TWO

Wednesday, February 16, 2011

8:00 **Registration and Coffee**

8:30 **Welcome Address and Chairperson's Opening Remarks**

8:45 **Off-shoring, In-sourcing, Contracting – Which is the Best Model for Your Company?**

So you have decided you want to cut costs and use outside counsel for particular legal processes – what you do next? There are so many factors to consider before making the decision whether to go off-shore, in-source, or hire contract lawyers.

- Clearly defining your companies outsourcing needs and expectations
- Taking into consideration the education, permanency, and skill level of outsourcing staff
- Exploring the cost benefit analysis for keeping work within U.S. borders especially considering the pool of domestic unemployed lawyers

Everett Upshaw, Legal Counsel, **Nokia**

9:30 **Case Study: Intellectual Property Outsourcing**

The early stages of the patent process do not necessarily require the expertise of United States licensed attorneys. The ministerial tasks associated with early stages of patent clearance make this area of law prime for reaping the benefits of outsourcing.

- Securing the flow of proprietary information between the client and outsourcing provider
- Outsourcing specific tasks such as prior art searches and application drafting
- Understanding the staffing for IP work from both the legal and engineering perspective

Sonia Baldia, Associate Professor of Law, **Widener School of Law**

10:15 **Networking Break**

11:00 **Extended Outsourcing Models Discussion Featuring Exclusive Virtual Chat Room**

Join this interactive panel of several off-shore and domestic outsourcing entities as they address questions related to your company's specific challenges and issues in the space. Members of the audience as well as online subscribers will have the opportunity to address their specific outsourcing concerns.

- Exposing the advantages and disadvantages of different off-shore locations and domestic outsourcing
- Finding out how different providers address work various issues such as, work in the cloud, privileged information, data security and quality control
- Assessing which outsourcing business models best fits your company's legal processing needs

Moderator: William McComas, Partner, **Shapiro Sher Guinot & Sandler**

Panelists: Mark Ford, Director of Knowledge Center in India, **Clifford Chance**

12:30 **Lunch**

1:30 **Using the Cloud to Deliver Legal Process Outsourcing: Risks and Ethical Considerations**

Law firms and their clients are increasingly turning to the cloud for information storage and other applications. According to an article co-authored by our speaker and published in the May 2010 issue of the New York Professional Responsibility Report (NYPRR), cloud computing is a "trend which essentially entails 'outsourcing' some or all of the firm's technology infrastructure, software applications, and storage needs to a third-party provider from whom the firm 'leases' them, over the Internet, for a monthly fee." This session will examine the benefits, risks and ethical implications of cloud computing from both a law firm and client perspective.

- Defining and describing the different types of cloud computing services available
- Assessing the benefits of the cloud, such as convenience, scalability and cost savings
- Weighing the risks of the cloud, such as confidentiality, security and access to information
- Developing strategies for risk management

Maura R. Grossman, Counsel, **Wachtell Lipton Rosen & Katz**
Daniel Masur, Partner, **Mayer Brown**

2:15 **Networking Break**

2:45 **Best Practices in Project Management: Mechanics of Outsourcing**

Deciding to outsource a project or task is just the first step. In order to maximize cost-savings and ensure high quality work, it is crucial to execute sound project management within your company and the outsourced entity.

- Ensuring that everyone is on the same page with respect to requirements for the outsourced project
- Creating a smooth flow of communication between your company and outsourced entity
- Integrating outsourced projects into the operational dynamic of your firm or company

Lynn Simpson, Knowledge Manager for Legal Function, **DuPont**

3:30 **Uncovering the "What" and "How" of Outsourcing Decisions**

The type of tasks companies and firms outsource varies depending on the needs of the particular organization. Moreover, from a strategic standpoint some firms enter into outsourcing agreements on case by case basis whereas others outsource particular functions on matters across the board.

- Strategizing how to enter into LPO arrangements
- Maximizing the cost-saving benefits and minimizing risk through sound outsourcing strategy
- Gaining insight into different ways your company can implement LPO services

William A. Tanenbaum, Chair, Technology, Intellectual Property & Outsourcing Group, **Kaye Scholer LLP**

4:15 **Closing Remarks and End of Conference**

"As practice changes, financing changes, governance in other countries changes, we've got to consider the impact on those practicing law in the U.S., [LPO] is simply not something we can ignore. If you've got a fair amount of money from capital markets funding law firms from other countries, and you are in fact competing with them or opposing them in other cases, it would very likely have an impact on what you can do for clients. U.S. lawyers should consider it; what they decide to do I cannot predict."

Immediate-past ABA President Carolyn B. Lamm, Partner, **White & Case LLP**



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Fax: 212-697-4106



Increase your learning and attend
both events for a single low price.

An unprecedented upheaval in financial markets has led to one of the most turbulent periods in corporate history. With the implementation of the **Dodd-Frank Act**, financial corporations must respond and adapt immediately. **These changes will have a direct impact on e-discovery practices.** This unique e-discovery event brings together in-house counsel, IT experts, document management, law firms, solution providers, judges and regulatory experts. You will learn how to improve your e-discovery processes and save time and money despite the heightened regulatory scrutiny and onslaught of litigation.

Conference Topics Include:

- How the Dodd-Frank Act will affect you
- Sanctions and judicially imposed penalties
- Lessons learned from headline disasters
- Capturing and storing ESI from tweets, diggs, squawks, and TXTs
- Finding money-saving solutions
- And more!

REGISTRATION INFORMATION

	Register & Pay by 12/24/10	Register & Pay by 1/21/11	Standard Price
In House Counsel	Save \$600 \$999	Save \$400 \$1,199	\$1,599
All Other	Save \$600 \$1,599	Save \$200 \$1,999	\$2,199
Workshops	\$549 each		

Attend Legal Process Outsourcing and eDiscovery For Financial Services (www.e-discoveryfinance.com) For One Low RATE!!

	Register & Pay by 12/24/10	Register & Pay by 1/21/11	Standard Price
In House Counsel	\$1,099	\$1,299	\$1,699
All Other	\$1,799	\$2,199	\$2,399

Please note multiple discounts cannot be combined.

A \$99 processing charge will be assessed to all registrations not accompanied by credit card payment at the time of registration.

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