



Global Legal Process Management Boot Camp

May 18 - 20, 2010 - Mumbai & Delhi, India

Selected Presentation Summaries

Challenges & Opportunities in Discovery Outsourcing **By Ron Friedmann, Integreon, Inc.**

Both corporations and law firms have a choice in how they manage discovery: internally, outsource, or a mix. Strategies for each of the phases -- collecting, processing, analyzing, reviewing, and producing documents -- may differ. Processing documents internally offers control and potentially reduced cost, but it also creates risk and often higher fixed or variable costs. This session will outline a framework and describe the factors that should drive discovery strategies and result in optimal decisions.

Ethical Considerations in Legal Outsourcing **By Mark Ross, Integreon, Inc.**

The outsourcing of legal work by a law firm or legal department to a legal outsourcing entity located offshore raises specific issues pertaining to the outsourcing lawyer's ethical obligations to his or her client. This session on the Ethics of Legal Outsourcing addresses the following key issues:

- Unauthorized Practice of Law
- Duty to Act Competently
- Duty to Disclose
- Conflict of Interests
- Client Confidentiality
- Appropriate Billing
- Data Protection
- Export Control Regulations

A Multi-Shore Approach to Legal Outsourcing **By Michael Sonsteng, Integreon, Inc.**

This session explores the benefits, considerations, and costs of a multi-shore legal outsourcing strategy. It will include the impact of time zones, cultural relationships, language capabilities, workflows, consistent deliverables, and a case study. It will also provide practical tips for coordinating work across continents by highlighting the importance of process and documentation.

Who are the LPO workers & why is that important? **By Sanjay Kamlani, Pangea3, Inc.**

One of the most commonly asked questions of prospective LPO clients relates to the legal talent in India. "What kind of lawyers really work at LPOs?" and "If they really are among the best lawyers in India, why do they choose to work at LPOs rather than working at top law firms or in-house counsel practices?" This presentation will address these questions providing insight into the nature of the LPO industry talent pool and the mentality and motivation of lawyers within that pool.

Legal Services Program Management & Supervision **By Sanjay Kamlani, Pangea3, Inc.**

Legal Services Program Management & Supervision is a critical aspect of how LPOs add value to legal functions that they take over from in-house counsels. This session explores how effective management and supervision ensure consistent implementation of processes and quality assurance programs that drive value. It will also explore how the senior lawyer experience of program managers and supervisors ensures the thoughtful, strategic value-addition typically associated with high level western lawyers typically involved with these functions in-house.

LPO Market Survey & Overview **Neeraja Kandala, ValueNotes Research**

This session will focus primarily on the LPO vendor landscape including how the industry evolved and its current status. It will outline the changing global landscape, its impact on the competitive landscape for LPO, and the attributes of the dominant players including scalability, global footprint, and onshore presence.

Mechanics: The Process of Legal Outsourcing **By Kunoor Chopra, LawScribe, Inc.**

Legal Process Outsourcing is still a relatively new discipline, so successful interactions between clients and vendors require well-defined processes. This session explores the mechanics of LPO from establishing expectations to defining work and its costs (work units, measurements). It will outline the mechanisms used for workflow (units, distribution -- how and to whom) and communication flow (reports, measurements, frequency, distribution lists) and address procedures for accountability and escalation. Finally, the presentation will discuss methods to monitor, assess, and audit procedures.

Security & Privacy for Legal Outsourcing **By Kunoor Chopra, LawScribe, Inc.**

Law firms and clients are increasingly concerned about the security and confidentiality of the information being outsourced. This session addresses the various contractual, physical, data and network security measures that law departments and firms should review and evaluate when choosing outsourcing partners to ensure that information is protected.

About Red Bridge Strategy, Inc.

Red Bridge Strategy is an independent firm offering consulting and advisory services to corporations and law firms evaluating legal process outsourcing. The company does not provide outsourcing services, nor is it affiliated with any outsourcing providers.



Global Legal Process Management Boot Camp May 18 - 20, 2010 - Mumbai & Delhi, India Speaker Biographies

Ron Friedmann, Integreon, Inc.

A Senior Vice President of Consulting at Integreon, Ron Friedmann is a global leader in knowledge support services for professionals. He has extensive experience in law practice management, outsourcing, legal technology, knowledge management, and e-discovery. Prior to Integreon, Ron founded Prism Legal Consulting, served as CIO at Mintz Levin, and managed practice support at Wilmer Cutler (now WilmerHale). He also has experience in two legal software companies and as a strategy consultant at Bain & Co.

Mark Ross, Integreon, Inc.

Mark Ross is Integreon's Vice President of Legal Services. Mark is a former partner at Underwood Solicitors LLP where, in 2004, he was responsible for the development of the workflow system for outsourcing to the firm's South Africa office. He is a recognized authority and thought leader in the field of legal outsourcing, and has numerous articles published on the subject. He has lectured and written extensively on the ethical implications of outsourcing legal work.

Michael Sonsteng, Integreon, Inc.

Michael Sonsteng is Integreon's Vice President of Legal for all of its India Operations and is responsible for delivery and best practices for Integreon's legal services. Michael previously practiced complex civil litigation and holds an MBA and a JD. Michael has been an adjunct professor at two US law schools and is a lecturer for various legal organizations. (U)

Shrihari Gokhale, Fiserv Global Services, Inc.

Based in Pune, India, Shrihari is the President Fiserv Global Services and was previously the Managing Director Barclays Technology Centre India. Shrihari returned to India in 2001 to become the President of Kanbay Software India Pvt. Ltd where he grew the organization from 400 to 5,000 in five years. Before returning to India in 2001, Shrihari worked in the U.S. for 15 years in a range of consulting and management positions.

Neeraja Kandala, ValueNotes Research

Neeraja is a research analyst at ValueNotes where she has more than seven years of research experience and specializes on researching the outsourcing industry. Neeraja's primary coverage areas include tracking offshoring trends and key service providers in the offshore legal services industry, emerging service areas for offshoring and sourcing advisory. Neeraja has authored several reports on the knowledge process outsourcing industry, and focuses on legal process outsourcing.

Sanjay Kamlani, Pangea3, Inc.

Sanjay is the co-founder and Co-CEO of Pangea3. He is responsible for leading client delivery and corporate administration for Pangea3 with Operations, HR, Finance, and IT managed in India. Prior to forming Pangea3, Sanjay was the CFO & General Counsel of OfficeTiger and a Sr. Manager at PricewaterhouseCoopers in New York City.

Ajay Agrawal - Chief Solutions Officer

Ajay is a senior corporate lawyer with experience in M&A transactions, litigation, and outsourced legal services. As a Senior Associate in the London and New Delhi offices of Jones, Day, Reavis & Pogue, Ajay structured the legal aspects of private equity investments and has worked on some of the largest M&A transactions in the Indian market. Ajay has an LLM from Columbia University Law School, a BA (Honors) in Law from Trinity College, University of Cambridge and a BA (Honors) magna cum laude from Brown University.

Kunoor Chopra, LawScribe, Inc.

Kunoor, the CEO, President and General Counsel of LawScribe, founded the company in 2004 with the vision of being recognized as the global leader in Legal Process Outsourcing. She was previously is an associate attorney with the international law firm of Fulbright and Jaworski L.L.P. and with formerly named Nossaman, Guthner, Knox & Elliott L.L.P, where she litigated numerous multimillion dollar cases. Kunoor is a professional member of the International Association of Outsourcing Professionals and Chairperson of the Delhi Chapter.

Matthew Sullivan, Red Bridge Strategy, Inc.

Matt is a founder and principal at Red Bridge Strategy, Inc. where he specializes in helping clients evaluate and globalize legal services through Legal Process Outsourcing (LPO) and related arrangements. He has 20 years of experience serving businesses in the capacities of attorney, management consultant and technologist. In addition to 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. Matt holds an undergraduate degree in computer science and graduate degrees in business and law.

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