From: Ryan, Patrick
Sent: Thursday, May 22, 2014 12:17 PM
To: Berlin, Steve
Cc: Dunn, James
Subject: RE: Training Request to Receive Travel & Lodging Waiver

Hi Steve –

I have attached a conference brochure pertaining to the event I recently attended on behalf of the Law Department / City. In addition to the regular scheduled events, there was a Product Advisory Board (formerly Customer Advisory Board) meeting on May 12, and one-on-one executive sessions May 15.

Here is a recap of events and costs that were covered by whom:

May 12 – 15, 2014

Conference Registration: LexisNexis
Round Trip Airfare (O'Hare to Dulles May 12 / Dulles to O'Hare May 15): LexisNexis
Lodging (May 12/13, 13/14, 14/15): LexisNexis
Meals/Refreshments During Sessions: LexisNexis
Ground Transportation to/from O'Hare: City of Chicago
Luggage Fee: Pat Ryan
Car Rental/Fuel: Pat Ryan
Dinner (May 13 & 14): Pat Ryan
Meals (May 15): Pat Ryan
Incidentals: Pat Ryan

Please advise if there is anything else that is needed.

Thanks.

PJR

2014 CounselLink Annual Customer Conference

Lansdowne Resort, Leesburg, VA • May 13-14

Tuesday, May 13, 2014

	Executive Track	User Track: Beginner	User Track: Intermediate	User Track: Advanced
7:30 – 9:00 a.m.	**REGISTRATION** - *Outside Ballroom C*			
8:00 - 9:00	**PEER NETWORKING BREAKFAST** - *Riverside Hearth* *Learning Lab by appointment only*			
9:00 - 9:15	**Welcome and Opening Remarks:** Jonah Paransky / Mike Lipps - *Ballroom A/B*			
9:15 - 9:30	**Agenda Overview** - Rashmi Shah / Lynette Day - *Ballroom A/B*			
9:30 - 10:30	**Think, Act and Achieve Like a Top Legal Visionary** **Keynote Speaker:** David Galbenski, Founder and EVP of Strategic Initiatives, Lumen Legal - *Ballroom A/B*			
10:30 - 10:45	**BREAK** - *Outside Ballroom A/B*			
10:45 - 12:00 p.m.	**Panel Discussion: Alternative Fee Structures:** Starting and Sustaining AFAs through Collaboration Dan Ruderman - *Ballroom A/B*			
12:00 - 1:30	**NETWORKING LUNCH** - *Ballroom Terrace* **Themed Tables:** AFAs, User Configurable Data Fields, Budgeting, Invoice Review, Administrators Issues, Assessing Outside Counsel, Matter Management, Best Practices for Reporting Ask an Expert: Learning Lab** / LexisNexis University Booth (1:00 - 1:30 p.m.)			
1:30 – 2:30	**Moving Up the Maturity Model** Kris Satkunas - *Conant*	**Maximizing Matter Management I** Amy Choe - *Ballroom D*	**Budgeting** Amy Nelson and PSO / AM - *Bacon*	**User Configurable Data Fields** Mike Casey / Jeff Skott - *Ballroom C - Learning Lab*
2:30 - 2:45	**BREAK**			
2:45 – 3:45	**Leveraging the Data in CounselLink** Justin Silverman - *Conant*	**Reporting I: The Basics** Amy Nelson - *Ballroom D*	**Reporting II: Intermediate / Advanced** Jeff Skott / Kris Satkunas - *Bacon*	**User Configurable Data Fields** Mike Casey - *Ballroom C - Learning Lab*
3:45 – 5:00	**Practical Tools to Thrive in a Transforming Legal Industry** David Galbenski - *Conant*	**Reporting Learning Lab** Amy Nelson - *Ballroom C - Learning Lab*	**Top 10 Practices for Using CounselLink to Improve Relationships with Outside Counsel** Mike Haysley / Jeff Skott - *Bacon*	**Maximizing Matter Management II** Amy Choe / Mike Casey - *Ballroom D*
5:00 - 6:00	**NETWORKING COCKTAIL RECEPTION** - *Clubhouse* Ask an Expert: Learning Lab** / LexisNexis University Booth			
6:00 - 9:00	**CUSTOMER APPRECIATION DINNER** - *Clubhouse*			

Agenda subject to change.

View general session descriptions

View Executive Track session descriptions

View User Track session descriptions

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Wednesday, May 14, 2014

	Executive Track	User Track: Beginner	User Track: Intermediate	User Track: Advanced
8:00 – 8:30 a.m.	**PEER NETWORKING BREAKFAST** - *Riverside Hearth*			
8:30 – 9:15	**Strategic Vendor Management & Effective Right Sourcing** Mike Haysley - *Conant*	**40 Tips in 40 Minutes** Amy Nelson - *Ballroom D*	**Learning Lab** *Ballroom C - Learning Lab*	**Super User Round Table** Jeff Skott / Kris Satkunas / Mike Casey - *Bacon*
9:15 – 10:00		**Using Search Functionality and Other Tools for Greater Process Efficiency** Brandi Gunn / Cindy Searle *Ballroom C - Learning Lab*	**Workflow, Workflow, Workflow** Amy Choe - *Ballroom D*	
10:00 - 11:00	**Panel Discussion:** Financial Management Kris Satkunas - *Ballroom A/B*			
11:00 - 11:15	**BREAK**			
11:15 - 12:30 p.m.	**LUNCH** Product Roadmap Presentation Justin Silverman - *Ballroom A/B*			
12:30 - 1:30	**Executive Open Mic** Jonah Paransky / Justin Silverman - *Conant*	**A to Zs of Invoice Review** Amy Nelson - *Ballroom C - Learning Lab*	**Reporting II: Intermediate / Advanced** Jeff Skott / Kris Satkunas - *Ballroom D*	**Implementing AFAs** Brandi Gunn/ Cindy Searle / Amy Choe - *Bacon*
1:30 - 2:15	**Best Practices in Legal Department Operations** Mike Haysley - *Conant*	**New User Round Table** Michael Casey / Amy Nelson / Brandi Gunn - *Bacon*	**Integrate for Greater Success** Amy Choe - *Ballroom D*	**Reporting III & Learning Lab** Kris Satkunas / Jeff Skott - *Ballroom C - Learning Lab*
2:15 - 2:30	**CLOSING** - Jonah Paransky - *Ballroom A/B*			
2:30 - 3:30	Ask an Expert: Learning Lab** / LexisNexis University Booth - *Ballroom C - Learning Lab* 1:1s with Account Managers			

Agenda subject to change.

View general session descriptions
View Executive Track session descriptions
View User Track session descriptions

**** Come visit the LexisNexis CounselLink Learning Lab!**
Available from conference start to finish, this knowledge-packed resource room is open to all walk-up users at designated times on both days. Sit down with one of our product experts and get 1:1 training and troubleshooting help on one of our dozens of computers, as you log in and access your own data.

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www.counsellink.com/Conference2014

2014 CounselLink Annual Customer Conference

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General Session Descriptions

Session	Description
May 13, 2014 – 9:30 – 10:30 AM **Keynote:** **Think, Act and Achieve Like a Top Legal Visionary** David Galbenski - Founder and EVP of Strategic Initiatives, Lumen Legal	Discover the top trends and leading visionaries responsible for dramatic transformations already underway in the legal services industry, as well as the main impediments standing in the way of progressive change. Join David Galbenski, legal industry author and thought leader, for an insightful discussion about these critical topics during a fast-paced and interactive keynote kick-off to our conference. The context-setting details you'll learn in this session will give you a better framework for visualizing how the information and tools covered in other conference presentations can be applied to create positive changes in your department and career.
May 13, 2014 – 10:45 – 12:00 PM **Panel Discussion:** **Alternative Fee Structures –** **Starting and Sustaining AFAs through Collaboration** Dan Ruderman - Account Executive	Initiating and sustaining AFAs can be a challenging goal for both law firms and corporate legal departments. All the variations and complexities involved often make it difficult to even know where to begin. This session will cover some of the basics for getting started, and also discuss best practices for identifying your objectives, determining the scope of your program and customizing the approach to ensure a win-win solution. Since AFAs are not the universal solution to every kind of legal work, we'll also address where AFAs make the most sense and the types of matters where you may want to follow a more traditional route.
May 14, 2014 – 10:00 – 11:00 AM **Panel Discussion:** **Financial Management** Kris Satkunas – Strategic Services	Several CounselLink features make the collection, reporting and management of financial information highly efficient, including the gathering of matter budget and accrual information. This session will help customers take advantage of these features as management tools to: report variances, track budget changes, and hold lawyers accountable for their component budgets, forecasts, and accruals. We will also share ideas on how CounselLink can enable legal departments to be better corporate partners with accurate financial reporting and managing to budget goals.

Agenda subject to change.

Executive Track Session Descriptions

Session	Description
May 13, 2014 – 1:30 – 2:30 PM **Moving Up the Maturity Model** Kris Satkunas – Strategic Services	Relying on Enterprise Legal Management systems, such as CounselLink, is a relatively new experience for most legal departments … many of which are only beginning to understand the benefits that can result from properly utilizing ELM solutions. This interactive session will explore milestones along the maturity path, suggestions to overcome impediments, and the keys to establishing a roadmap for continuous improvement and success. The discussion will also cover best practices, implementation experiences, and the importance of sharing and utilizing the valuable data within CounselLink.
May 13, 2014 – 2:45 – 3:45 PM **Leveraging the Data in CounselLink** Justin Silverman - Senior Director Product Management	One of the most powerful components of the CounselLink system is the data captured in CounselLink. Legal departments that maximize the value of CounselLink use that data to increase internal efficiency, to control outside counsel spend and to communicate effectively with key stakeholders across the organization. Learn from your peers in this panel discussion how some of your colleagues are leveraging the data in CounselLink. See some sample reports and dashboards that have been put in place and learn about the process surrounding these reporting tools.
May 13, 2014 – 3:45 – 5:00 PM **Practical Tools to Thrive in a Transforming Legal Industry** David Galbenski - Founder and EVP of Strategic Initiatives, Lumen Legal	If you're looking for valuable takeaways at the conference, don't miss this session. Our keynote presenter, David Galbenski, leads this best practice discussion to highlight simple tools and techniques you can use to unlock more value in your legal spend, find advantages in the legal services evolution, and lead the pace of change in your department. Since he's also going to facilitate the sharing and discovery of the group's collective insights, come prepared to brag about your own experiences and lessons-learned. It's going to be interesting and informative; you'll want to be there.
May 14, 2014 – 8:30 – 10:00 AM **Strategic Vendor Management & Effective Right Sourcing** Mike Haysley – Strategic Consulting	Every legal department faces a delicate and ongoing balancing act in deciding which resources to apply in delivering the best cost, quality and results. New sourcing choices complicate the situation further as other legal service providers enter the traditional mix of outside law firms and in-house staff. In this session, we'll discuss how some legal departments are managing their vendor panel and insourcing alternatives to meet stated goals and objectives.
May 14, 2014 – 1:30 – 2:15 PM **Best Practices in Legal Department Operations** Mike Haysley – Strategic Consulting	Part consultant, project leader, business manager, subject matter expert, IT guru and HR practitioner … the job description for Legal Department Operations (LDO) managers continues to evolve. Join this interactive session to learn how the LDO role is creating a positive change in legal departments through daily effort, identifying opportunities and gaining buy-in on key initiatives.

Agenda subject to change.

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User Track Session Descriptions

Session	Description
May 13, 2014 – 1:30 – 2:30 PM **Maximizing Matter Management I** Amy Choe – Professional Services	New and intermediate users: If you aren't fully utilizing the Calendar, Contact and Outlook features in CounselLink, you won't want to miss this informative class which will show you how to use those elements to maximize matter management efficiencies. This is the first of a two-part session, and similar to content discussed in the recent Matter Management webinar.
May 13, 2014 – 1:30 – 2:30 PM **Budgeting** Amy Nelson – Training Corina Bogdan – Account Mgmt.	For users familiar with CounselLink and ready to move to the next level, this session will rely on multiple use cases – from simple matter budgets to more complex law firm-submitted examples – to demonstrate what you can accomplish through budgeting.
May 13, 2014 – 1:30 – 2:30 PM **User-Configurable Data Fields** Mike Casey – Product Mgmt. Jeff Skott – Principal Solutions Architect	For those who have attended a basic UCDF class, this hands-on lab will guide advanced users in applying that knowledge in practical ways to benefit their legal department.
May 13, 2014 – 2:45 – 3:45 PM **Reporting I: The Basics** Amy Nelson - Training	New users: This introductory session covers the fundamentals of Reporting, including the key topics of: basic navigation; editing, manipulating, running and saving standard reports; and subscription set-up and management. This course is a prerequisite for Reporting II.
May 13, 2014 – 2:45 – 3:45 PM **Reporting II: Intermediate to Advanced** Jeff Skott – Principal Solutions Architect Kris Satkunas – Strategic Services	For those ready to move beyond basic reporting, this class explores advanced capabilities, including: report formatting; adding metrics derived from established report objects; designing period-based reports; and using dynamic and static filters. Tips for visualizing data will also be discussed, such as heat maps, bubble charts and other techniques your General Counsel will appreciate.
May 13, 2014 – 3:45 – 5:00 PM **Top 10 Best Practices for Working Collaboratively with Outside Counsel** Mike Haysley – Strategic Consulting Jeff Skott – Principal Solutions Architect	Gain understanding about the importance and benefits of collaborative relationships with outside counsel from the perspective of a lawyer, former LDO director and current head of Strategic Consulting. This special session offers high-level insights as well as how-to details about using CounselLink accruals, document drops, budgeting and other functions to full advantage.
May 13, 2014 – 3:45 – 5:00 PM **Maximizing Matter Management II** Amy Choe – Professional Services Mike Casey – Product Mgmt.	This second part of the Matter Management discussion takes a deeper-dive into the subject to derive more value from CounselLink capabilities involving Contacts, Matter Templates, Outlook, Calendars and other elements.
May 14, 2014 – 8:30 – 9:15 AM **40 Tips in 40 Minutes** Amy Nelson - Training	New users: If you're looking for ways to boost efficiency, this session will highlight at least 40 tips, techniques and useful tools that will help you complete tasks faster and handle routine day-to-day activities better than ever.

Agenda subject to change.

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User Track Session Descriptions

Session	Description
May 14, 2014 – 8:30 – 10:00 AM **Super User Round Table** Jeff Skott – Principal Solutions Architect Kris Satkunas – Strategic Services Mike Casey – Product Mgmt.	Based on a Product Advisory Council member suggestion, this session gathers Advanced Users for an interactive discussion and idea-sharing opportunity. Learn from colleagues about getting the most from your CounselLink solution and acquire some must-know tips and tricks to use in your own department. Advanced registration is required.
May 14, 2014 – 9:15 – 10:00 AM **Using Search Functionality & Tools for Greater Process Efficiency** Brandi Gunn – Professional Services Cindy Searle – Account Management	New and intermediate users: This session delivers practical steps and process improvement ideas surrounding CounselLink Search and related functional tools that will give you quicker results and / or better efficiency.
May 14, 2014 – 9:15 – 10:00 AM **Workflow, Workflow, Workflow** Amy Choe – Professional Services	Learn all about Workflow– how invoices are routed, what options are available, and how to approach revisions and new Workflows. This interactive session will cover what to consider when thinking about workflow design and how the correct design can vastly improve department efficiency and the overall success of your department. Workflow examples will be discussed along with information about new routing functionality and opportunities to re-examine how to improve your workflows.
May 14, 2014 – 12:30 – 1:30 PM **A-to-Zs of Invoice Review** Amy Nelson - Training	New and intermediate users: Session focuses on a critical legal department activity by addressing all the key elements of successful invoice review.
May 14, 2014 – 12:30 – 1:30 PM **Reporting II: Intermediate / Advanced** Jeff Skott – Principal Solutions Architect Kris Satkunas – Strategic Services	For those ready to move beyond basic reporting, this class explores advanced capabilities, including: report formatting; adding metrics derived from established report objects; designing period-based reports; and using dynamic and static filters. Tips for visualizing data will also be discussed, such as heat maps, bubble charts and other techniques your General Counsel will appreciate.
May 14, 2014 – 12:30 – 1:30 PM **Implementing AFAs** Brandi Gunn – Professional Services Cindy Searle – Account Management Amy Choe – Professional Services	As a follow-on to Tuesday's panel program highlighting the importance of AFAs, this session gives users practical guidance in spotting the best AFA opportunities and leveraging CounselLink capabilities to put AFAs into action.
May 14, 2014 – 1:30 – 2:15 PM **New User Round Table** Mike Casey – Product Mgmt. Amy Nelson - Training Brandi Gunn – Professional Services	Meet with other new users and CounselLink representatives for a casual, interactive discussion to share best practices, tips, tricks and more.

Agenda subject to change.

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User Track Session Descriptions

Session	Description
May 14, 2014 – 1:30 – 2:15 PM **Integrate for Greater Success** Amy Choe – Professional Services	Did you know that there are over a hundred live integrations with CounselLink that run every week? These integrations do everything from creating and updating matters to sending out invoice information to AP systems and creating contacts. This session will cover the standard integrations supported by CounselLink and how they can be tailored to specific needs. Best practices for managing integrations and planning ahead for changes. For customers with existing integrations, this session will cover topics including common enhancements.
May 14, 2014 – 1:30 – 2:15 PM **Reporting III & Learning Lab** Jeff Skott – Principal Solutions Architect Kris Satkunas – Strategic Services	For users who still want more after attending the Reporting I and II programs, this hands-on session will help you take reporting to the next level. Following a brief introduction covering the newest tools and capabilities, meet with CounselLink experts to create your own advanced reports.

Agenda subject to change.

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Keynote Speaker

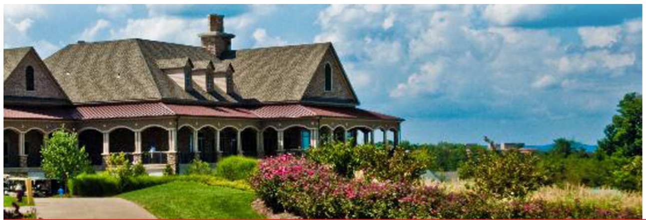
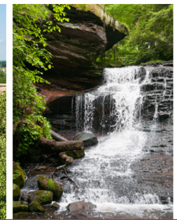
David Galbenski
Founder and EVP of Strategic Initiatives
Lumen Legal

David Galbenski is an entrepreneur, lawyer, author and public speaker with global reach. Among his achievements are recognition as an **Ernst & Young Entrepreneur of the Year** Award Winner, and twice receiving the Inc. 500 award which celebrates the 500 fastest-growing private companies in the U.S.

As Founder and EVP of Strategic Initiatives at **Lumen Legal**, he is a frequent contributor to the ongoing dialogue of transformation in the legal services industry. His first book, *Unbound: How Entrepreneurship is Dramatically Transforming Legal Services Today* has been sold throughout the U.S., Canada, UK, Australia and Russia. His recently-published follow-up book, *Legal Visionaries: How to Make Their Innovations Work for You*, is helping organizations gain the confidence to implement change in the rapidly-evolving legal services industry.

David is a passionate supporter of building the next generation of entrepreneurs to innovate and create products and services that address some of the world's biggest issues. As Global Chairman of The **Entrepreneurs' Organization** in 2008-09, he helped fuel the entrepreneurial spirit in over 40 countries.

David graduated with distinction from the University of Michigan Business School, and cum laude from Wayne State University Law School.

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Presenters & Session Leaders

Mike Casey
Product Manager
LexisNexis CounselLink

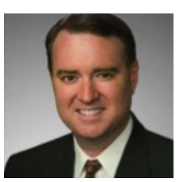
Mike has been consulting with corporate legal departments for more than 12 years, and has successfully aided professionals in implementing the best solutions for their matter and legal spend management activities.

Amy Choe
Senior Business Consultant
LexisNexis CounselLink

With previous work as a PwC consultant – and experience in business, IT and project management roles – Amy brings a solid set of credentials, as well as a law degree, to her consulting role in the professional services team and the clients she supports. In her six years with LexisNexis, Amy has shared her subject matter expertise and handled CounselLink implementation projects for a diverse and well-known group of large and small legal departments.

Brandi Gunn
Manager of Professional Services
LexisNexis CounselLink

In her professional services role, Brandi assembles and directs the right mix of technical and business resources to support customers through a variety of onboarding, conversion, integration and customization engagements. Her ability to deliver the kinds of results that create satisfied customers comes in part from having gained practical experience earlier as a business consultant, account manager, IT project implementation manager, and operations manager. During her 18-year association with CounselLink, Brandi was directly involved in managing the onboarding activities for some of the most complex CounselLink deployments with Fortune 500 customers. She earned a bachelor's degree from California State University, Sacramento.



Mike Haysley
Director of Strategic Services
LexisNexis CounselLink

Mike works with an expert team to advise corporate legal departments and help them manage the business of law in ways that improve operations and results. He has more than 15 years of experience in roles that include an in-house position as the Director of Legal Operations for a large legal department, and consulting to large legal organizations. This background provides a unique perspective of having personally addressed and managed many of the issues facing legal departments today, as well as understanding best practices and varying needs of legal departments. Mike graduated from Texas A&M University with a business degree, received his law degree from the University of Houston, and is licensed to practice law in Texas.

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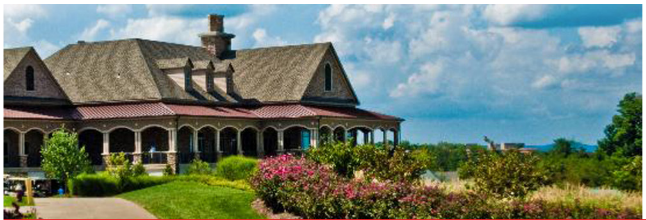
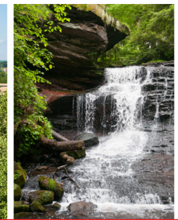
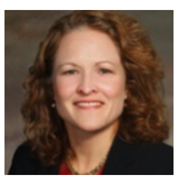
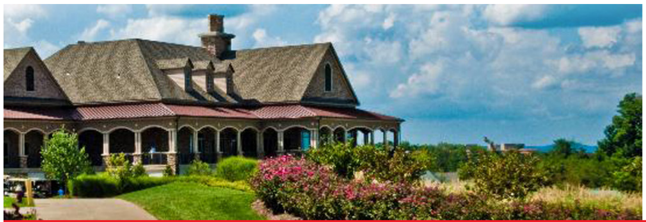
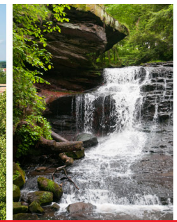


Presenters & Session Leaders

 **Amy Nelson** **Senior Trainer** **LexisNexis**	Amy handles the design, development and delivery of educational programs that benefit various LexisNexis user communities. Earlier in her career, she was an education specialist supporting the clinical and academic needs of a major medical center, and also had roles as a lab technician and public school teacher. Adept at using technology to facilitate the learning process for audiences and students of any age, Amy earned a Master of Education degree from North Carolina State University in Workforce Development and Training, and also a B.S. degree in Biology from East Carolina University.
 **Dan Ruderman** **Account Executive** **LexisNexis CounselLink**	Dan advises Fortune 1000 corporate legal clients on operational excellence, matter and legal spend management, and outside counsel management, with particular expertise in helping insurance company claims departments. He has helped some of the country's best-known claims legal departments institute techniques and programs that led to dramatic process improvement, as well as significant control over litigated claims' costs. Dan is a Claims and Litigation Management Alliance Fellow and National Committee member, and a member of the Risk Insurance Management Society. He has a bachelor's degree from Cornell University.
 **Kris Satkunas** **Director of Strategic Consulting** **LexisNexis CounselLink**	Kris leads a group effort advising corporate legal departments on improving operations and outcomes with data-driven decisions. As a top data mining and business of law expert, Kris has noteworthy credentials in the areas of matter pricing and staffing, partner compensation, practice area metrics and scorecards. Prior to CounselLink, she advised large law firm leaders for more than 10 years as part of the LexisNexis Redwood Analytics organization, leading data-based research activities as Director of the Redwood Think Tank, and managing consulting initiatives as head of the Analytic Services group. The author of numerous industry articles, Kris regularly speaks at legal conferences and events. She honed her financial skills with an earlier position in strategic finance at Suntrust Bank and by earning a bachelor's degree in finance from The College of William & Mary.



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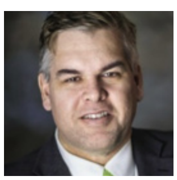
Presenters & Session Leaders

Cindy Searle
Strategic Account Manager
LexisNexis CounselLink

With a job description involving equal parts relationship management and strategic consulting, Cindy guides senior executives toward the software solutions and services corporate legal departments need to achieve better outcomes and results. In her account management role, she applies a dozen years of experience in software and technology, project management and enterprise operations. Before joining LexisNexis four years ago, Cindy worked with DataCert – advancing through a series of business analyst, project management and relationship management roles – and earlier served as a technical consultant with Meridium, a global software firm focused on analytics and physical asset performance. She earned a B.B.A. degree in Information Systems Management from Texas A&M University.

Justin Silverman
Senior Director Product Management
LexisNexis CounselLink

With responsibilities covering product strategy and the end-to-end customer experience, Justin is able to focus on creating tangible ways for customers to achieve better outcomes. In an earlier CounselLink role aligned with Data Analytics, he guided the launch of the innovative Counsel Benchmarking offering as well as the first edition of the Enterprise Legal Management Trends Report. Prior to joining LexisNexis, Justin managed a professional services business at Gerson Lehrman Group and acquired 6+ years of management consulting experience, including three years at the Boston Consulting Group. Justin has a JD from Northwestern University Law School, an MBA from the Kellogg School of Management and a bachelor's degree in International Relations from the University of Pennsylvania.



Jeff Skott
Principal Solutions Architect
LexisNexis CounselLink

Jeff has a broad charter of helping corporate legal departments – and their finance and information technology peers – understand the technical capabilities and business benefits associated with adopting CounselLink software and professional services. Accordingly, Jeff works with a variety of functional teams within the LexisNexis and the Business of Law Software Solutions group in building better processes, better tools and demonstrations that enable account managers, trainers and other solutions architects and customer-facing representatives to effectively showcase solution attributes to clients and prospects.

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