

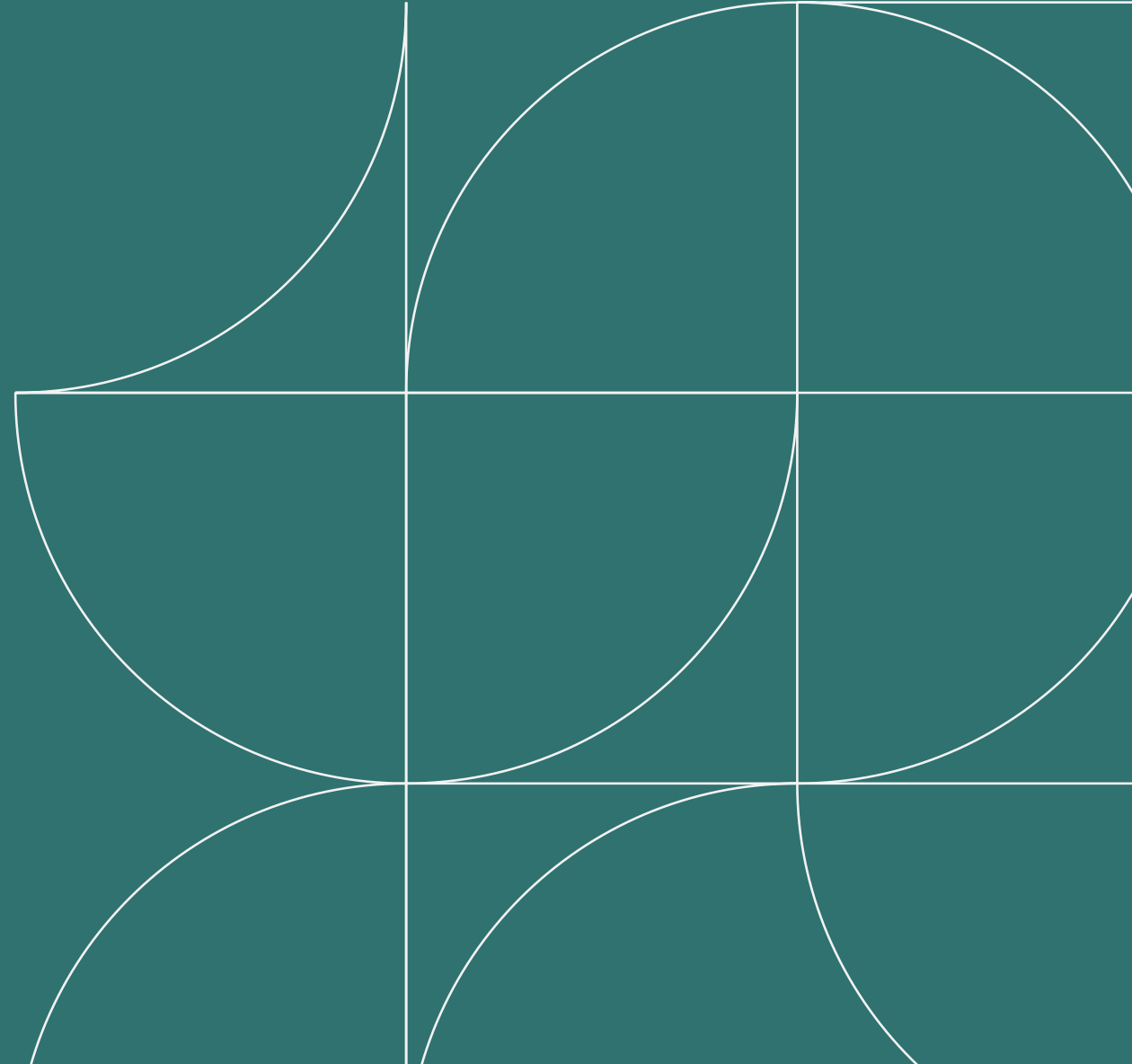


How to Maximize Value from Your Outside Counsel Relationships: Process Improvement, Innovation and Data Analytics

November 19, 2025

Seyfarth Shaw LLP

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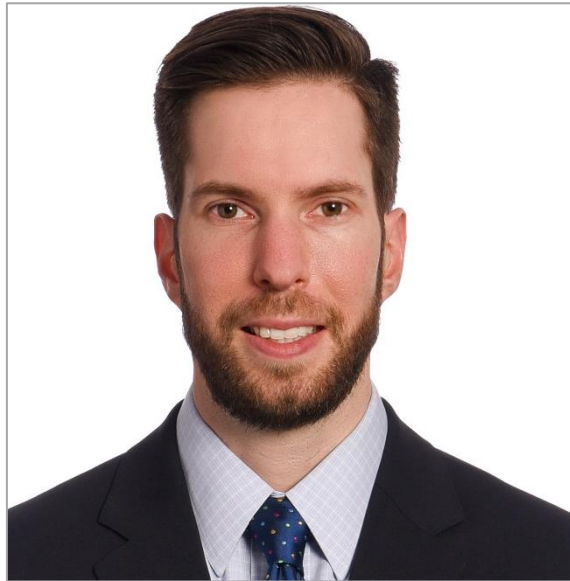
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Presenters



Dawn Solowey
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Boston



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Chicago

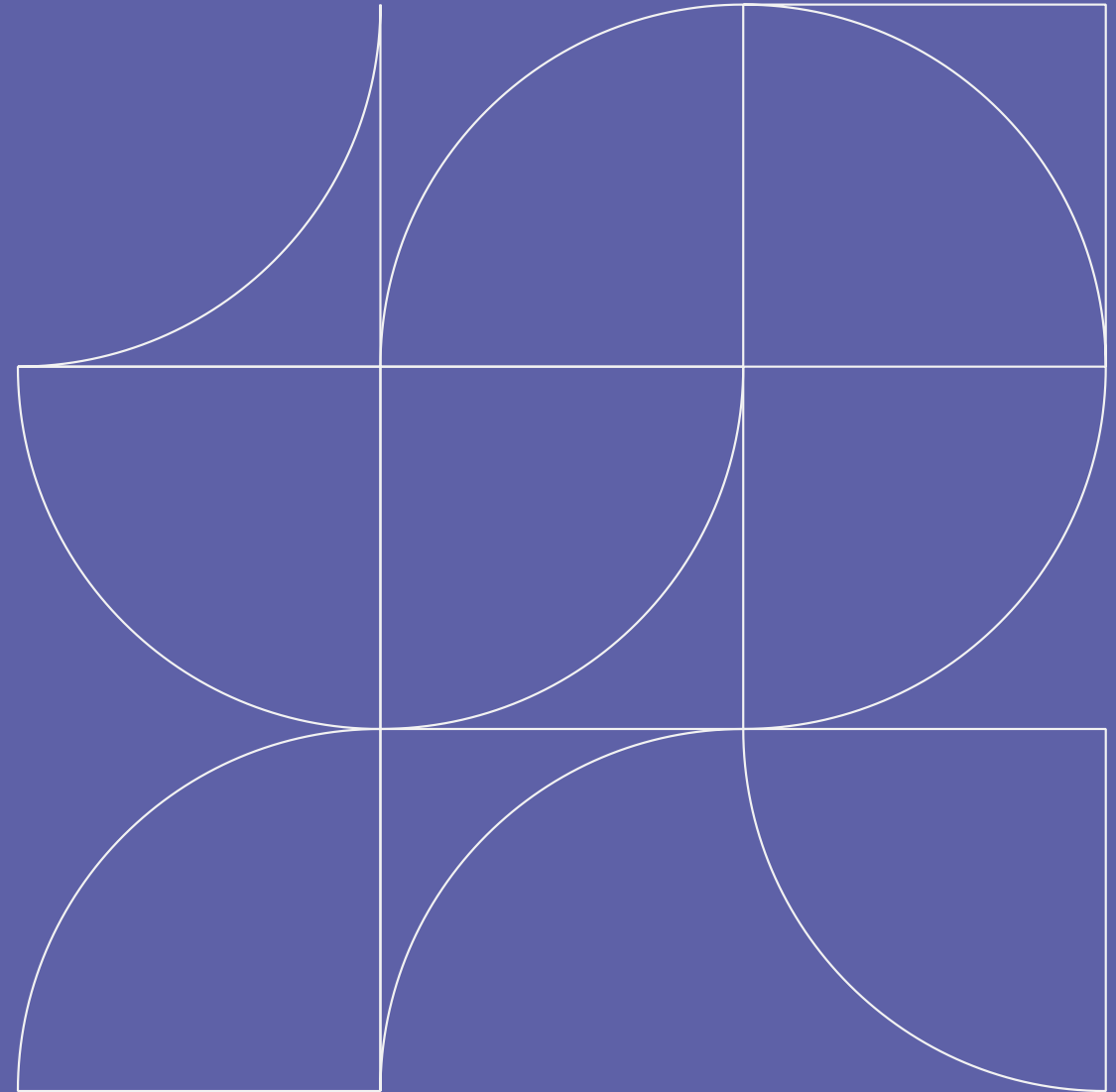


Cara Tamker
Associate General Counsel
IDG

Agenda

- 01** Introduction
- 02** Organizing and Making Sense Out of Data
- 03** Engaging With Technology Solutions
- 04** Utilizing Data-Driven Solutions
- 05** Distilling case insights and knowledge for practical and actionable use


Introduction




**What kind of
information are
you receiving?
Is it useful?**

A person wearing a light purple sweater is holding a stack of three cardboard boxes. The boxes are stacked vertically, with the top box being the smallest, the middle one medium, and the bottom one the largest. The person's arm is visible on the right side, holding the bottom box. The background is a white door with a panel design. The text "Does outside counsel provide support all the way to delivery?" is overlaid on the left side of the image in a large, white, sans-serif font.

**Does outside
counsel provide
support all the
way to delivery?**



Does outside
counsel really
understand your
business
priorities?

A person with dark hair, wearing an orange jacket over a blue shirt, is sitting at a white desk. They are leaning forward with their head resting on their right hand, which is placed on the keyboard of a silver laptop. Their left hand is also resting on the keyboard of the same laptop. They are wearing a blue watch on their left wrist and have bright yellow-green nail polish on their fingers. A pair of glasses is resting on the keyboard. To the left of the person is a pink smartphone. To the right is a black smartphone. The background is a light-colored wooden floor.

**Are your tech
solutions
genuinely
helpful?**

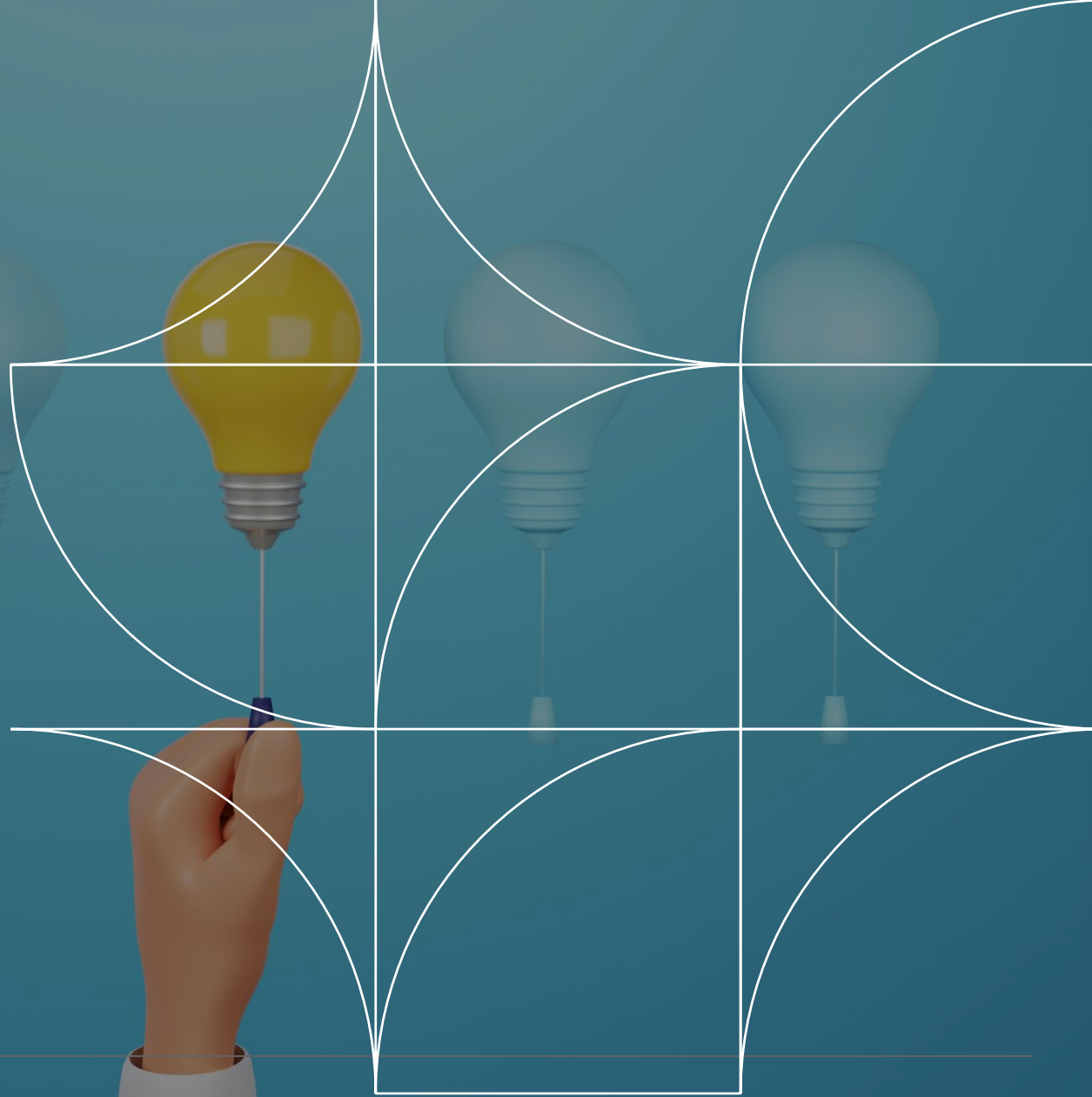
A close-up photograph of a man in a dark blue suit and white shirt. He is covering his face with both hands, with his fingers spread, suggesting a moment of stress, frustration, or exhaustion. He is wearing a wristwatch on his left wrist. The background is blurred, showing what appears to be an office setting.

1 in 4 in-house
counsel cite
THIS as their top
stressor

A close-up photograph of a dartboard. A single dart with a red and gold barrel is embedded in the bullseye. The bullseye is a small red heart on a light-colored wooden board. The word 'A' is printed in red above the heart. The background shows the radial segments of the dartboard in various colors like green, red, and yellow, all slightly out of focus.

Unrealistic Expectations from Top Management

In-House Counsel Wisdom



PLAN:

- **Share practical strategies**
- **Showcase collaborative approaches**
- **Highlight where you can engage your outside counsel to get more out of your relationship**





Defining the Problem

- **Real-world pain points**
 - Email overload and incomplete or stale updates
 - Inconsistent (or non-existent) project tracking
 - Difficulty extracting insights from data
 - Inability to make crucial business decisions
 - Waste



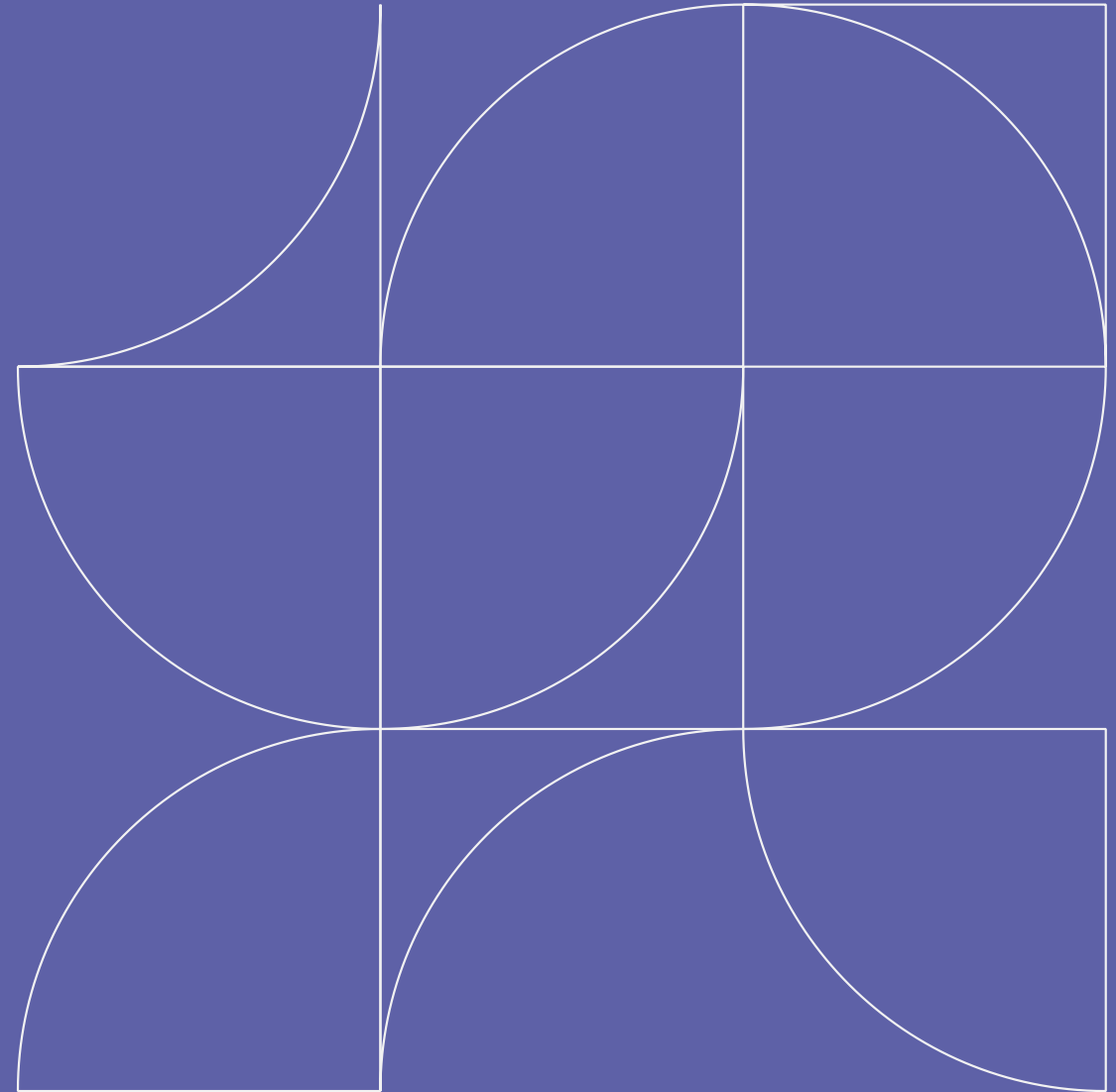
Value Proposition

- Estimate and **control** costs
- **Streamline** processes
- Identify and assign the most **effective resources**
- Track & manage **progress**
- Leverage **technology**
- Provide **transparency** to client
- Track any compliance issues that require **escalation** to client

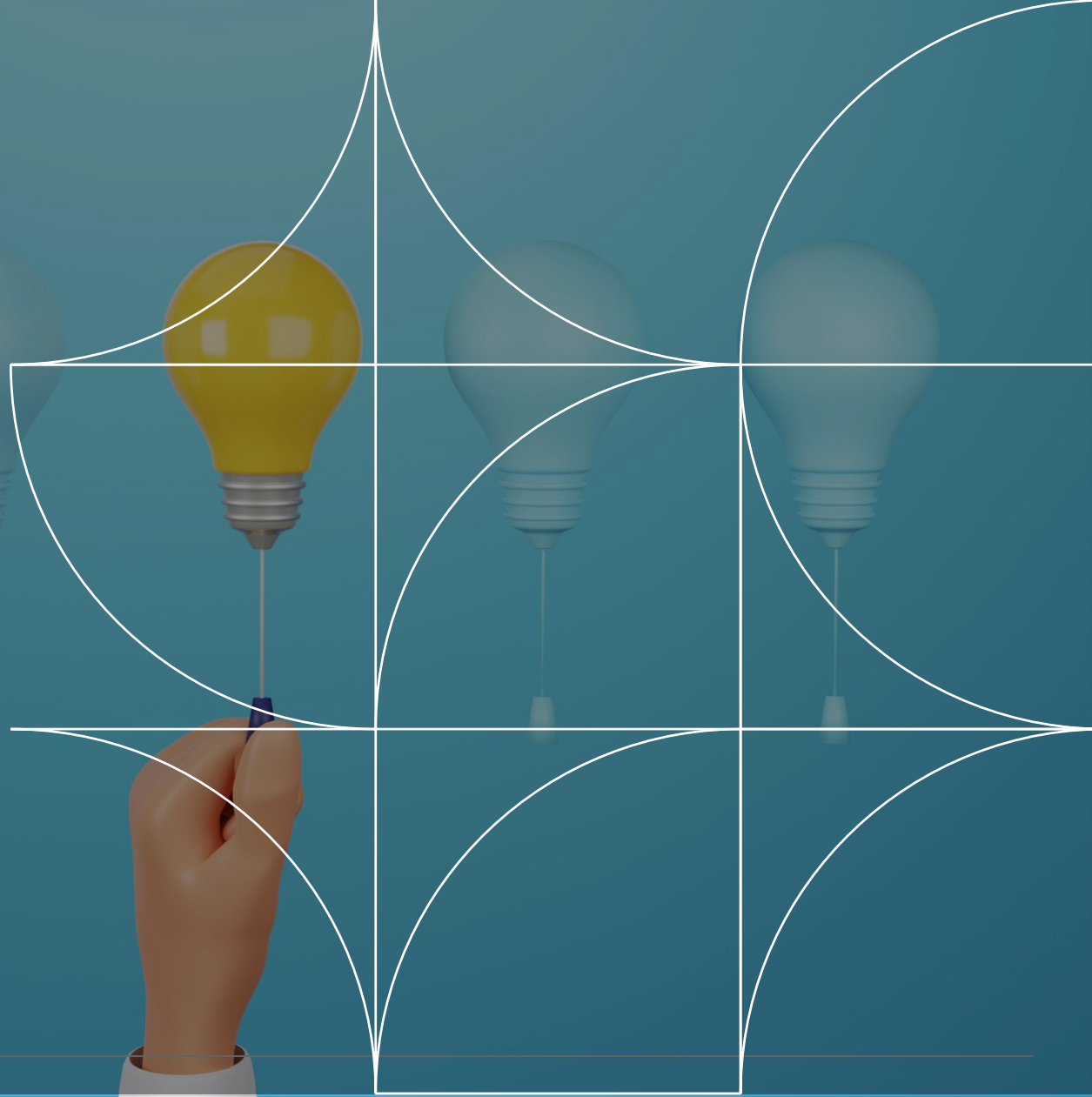
**Organizing and
making sense out
of data in its many
forms**



Engaging with Technology Solutions



In-House Counsel Wisdom





Case Study: Making Sense of Data

- Large Multinational Healthcare Organization
- Sent out “All Staff Survey” to tens of thousands of employees
- Data was collected in a single spreadsheet (~65 columns and 15,000 rows of data)
- Client sent Seyfarth current and previous year’s data pull
- Data was structured (i.e. formatted and organized), but story in the data was missing



The Data Set

The Heat Map

	AI	AJ	AK	AL	AM	AN	AO	AP	AQ	AR	AS	AT	AU	AV	AW	AX	AY	AZ	BA																		
7																																					
8	Fav		Trend		Fav		Trend		Fav		Trend		Fav		Trend		Fav		Trend																		
	1. I live up to its primary value of the needs of the patient come first.			1. I live up to its primary value of the needs of the patient come first.		2. Leaders make decisions that are consistent with values.		2. Leaders make decisions that are consistent with values.		3. I take a genuine interest in the well-being of its employees.		3. I take a genuine interest in the well-being of its employees.		4. I feel free to speak my mind without fear of negative consequence.		4. I feel free to speak my mind without fear of negative consequence.		5. I feel encouraged to innovate and come up with new ideas.		5. I feel encouraged to innovate and come up with new ideas.		6. Where I work, efforts are made to make everyone feel like part of the team.		6. Where I work, efforts are made to make everyone feel like part of the team.		7. I feel a strong sense of belonging at work.		7. I feel a strong sense of belonging at work.		8. My work gives me a sense of achievement.		8. My work gives me a sense of achievement.		9. Overall, I am proud to tell others that I work for this organization.			
10	Culture	Work Area	Employee	Engagement	first.	first.	values.	values.	employees.	employees.	employees.	employees.	consequence.	consequence.	consequence.	consequence.	new ideas.	new ideas.	new ideas.	new ideas.	part of the team.	part of the team.	part of the team.	part of the team.	belonging at work.	belonging at work.	belonging at work.	belonging at work.	achievement.	achievement.	achievement.	achievement.	reputation.				
11	100	87	92	100	0	100	0	100	0	90	-10	80	-20	90	-10	90	-10	90	-10	90	-10	100	0	100	0	100	0	100	0	100	0	100	0	100	0	100	0
12	63	58	82	58	0	50	0	42	0	42	-10	75	-20	58	-10	75	-20	58	-10	75	-20	83	0	83	0	83	0	83	0	83	0	83	0	83	0	83	0
13	63	58	82	58	0	50	0	42	0	42	-10	75	-20	58	-10	75	-20	58	-10	75	-20	83	0	83	0	83	0	83	0	83	0	83	0	83	0	83	0
14	49	33	45	59	-11	45	-25	23	-36	27	-17	36	-27	36	-5	36	-23	36	-23	36	-23	64	-10	64	-10	64	-10	64	-10	64	-10	64	-10	64	-10	64	-10
15	49	33	45	59	-11	45	-25	23	-36	27	-17	36	-27	36	-5	36	-23	36	-23	36	-23	64	-10	64	-10	64	-10	64	-10	64	-10	64	-10	64	-10	64	-10
16	63	61	72	63	-9	52	0	50	-7	50	2	67	-5	67	12	67	12	67	12	67	12	83	-7	83	-7	83	-7	83	-7	83	-7	83	-7	83	-7	83	-7
17	63	61	72	63	-9	52	0	50	-7	50	2	67	-5	67	12	67	12	67	12	67	12	83	-7	83	-7	83	-7	83	-7	83	-7	83	-7	83	-7	83	-7
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20	64	73	73	81	10	52	-24	43	-43	67	-4	76	-14	76	-14	76	-14	76	-14	76	-14	86	5	86	5	86	5	86	5	86	5	86	5	86	5	86	5
21	64	73	73	81	10	52	-24	43	-43	67	-4	76	-14	76	-14	76	-14	76	-14	76	-14	86	5	86	5	86	5	86	5	86	5	86	5	86	5	86	5
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23	82	67	80	80	7	90	23	70	17	60	0	70	-3	70	3	80	13	90	10	90	10	90	10	90	10	90	10	90	10	90	10	90	10	90	10	90	10
24	36	68	48	57	-3	29	-16	14	-11	71	1	57	-18	75	5	43	-7	55	-30	55	-30	55	-30	55	-30	55	-30	55	-30	55	-30	55	-30	55	-30	55	-30
25	36	68	48	57	-3	29	-16	14	-11	71	1	57	-18	75	5	43	-7	55	-30	55	-30	55	-30	55	-30	55	-30	55	-30	55	-30	55	-30	55	-30	55	-30
26	72	64	59	81	10	69	8	44	9	56	-12	56	-24	80	-10	69	14	63	-27	63	-27	63	-27	63	-27	63	-27	63	-27	63	-27	63	-27	63	-27	63	-27
27	72	64	59	81	10	69	8	44	9	56	-12	56	-24	80	-10	69	14	63	-27	63	-27	63	-27	63	-27	63	-27	63	-27	63	-27	63	-27	63	-27	63	-27
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35	58	84	67	58	-5	68	18	26	-6	68	16	95	43	89	32	63	24	89	2	89	2	89	2	89	2	89	2	89	2	89	2	89	2	89	2	89	2
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37	44	80	52	50	17	50	25	25	-5	63	21	88	46	88	30	50	8	63	-20	63	-20	63	-20	63	-20	63	-20	63	-20	63	-20	63	-20	63	-20	63	-20
38	44	80	52	50	17	50	25	25	-5	63	21	88	46	88	30	50	8	63	-20	63	-20	63	-20	63	-20	63	-20	63	-20	63	-20	63	-20	63	-20	63	-20
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41	65	56	65	68	12	61	24	42	13	42	9	61	24	65	23	77	40	87	1	87	1	87	1	87	1	87	1	87	1	87	1	87	1	87	1	87	1
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43	53	73	70	71	4	45	-26	29	-23	52	-15	80	-6	86	0	67	-4	81	-9	81	-9	81	-9	81	-9	81	-9	81	-9	81	-9	81	-9	81	-9	81	-9
44	53	73	70	71	4	45	-26	29	-23	52	-15	80	-6	86	0	67	-4	81	-9	81	-9	81	-9	81	-9	81	-9	81	-9	81	-9	81	-9	81	-9	81	-9
45	85	95	81	86	-14	83	-7	71	-19	86	-4	100	0	100	10	100	10	86	-14	86	-14	86	-14	86	-14	86	-14	86	-14	86	-14	86	-14	86	-14	86	-14
46	85	95	81	86	-14	83	-7	71	-19	86	-4	100	0	100	10	100	10	86	-14	86	-14	86	-14	86	-14	86	-14	86	-14	86	-14	86	-14	86	-14	86	-14

Technology solutions that improve transparency and efficiency





Case Study: Engaging Technology

- A national restaurant chain needed help tracking its restaurant redevelopment projects.

Key issues:

- Required Approvals
- Construction Covenants
- Parking Requirements
- Restrictions
- Signage

Old – Excel Request Tracker

	A	B	C	D	E	
1	State	Deal Type	Deal	Real Estate Developer	Critical Dates	Seyfarth Deliverables
2	Massachusetts	SL	Framingham, MA (.124)	B. Blue/ C. Navy	Sublease near finalization; awaiting ACME's response to KW's 10/8 redraft - update email indicated that response not likely until early next year.	HG to hold off on completing Title Summary an agreement allowing this deal to progress.
3	Massachusetts	SL	Framingham, MA (.124)	B. Blue/ C. Navy	Sublease near finalization; awaiting ACME's response to KW's 10/8 redraft - update email indicated that response not likely until early next year.	HG to hold off on completing Title Summary an agreement allowing this deal to progress.
4	Massachusetts	SL	Framingham, MA (.124)	B. Blue/ C. Navy	Sublease near finalization; awaiting XYZ's response to KW's 10/8 redraft - update email indicated that response not likely until early next year.	HG to hold off on completing Title Summary an agreement allowing this deal to progress.
5	Massachusetts	SL	Framingham, MA (.124)	B. Lavender/ C. Navy	Sublease near finalization; awaiting ACME's response to KW's 10/8 redraft - update email indicated that response not likely until early next year.	HG to hold off on completing Title Summary an agreement allowing this deal to progress.
6	Massachusetts	SL	Framingham, MA (.124)	B. Lavender/ C. Navy	Sublease near finalization; awaiting ACME's response to KW's 10/8 redraft - update email indicated that response not likely until early next year.	HG to hold off on completing Title Summary an agreement allowing this deal to progress.
7	Massachusetts	SL	Framingham, MA (.124)	B. Lavender/ C. Navy	Sublease near finalization; awaiting ACME's response to KW's 10/8 redraft - update email indicated that response not likely until early next year.	HG to hold off on completing Title Summary an agreement allowing this deal to progress.
8	Texas	L	Plains Mall, Lubbock TX, J. Mauve / K. Cerulean		Under negotiation.	
9	Texas	L	Plains Mall, Lubbock TX, J. Mauve / K. Cerulean		Under negotiation.	
10	Texas	L	Plains Mall, Lubbock TX, J. Mauve / K. Cerulean		Under negotiation.	
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List Items

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New – Smartsheet Tracker

FileAutomationFormsConnectionsDynamic View

Tracker

Share

GridFilter Off

Arial10B I U

Grid

Other Project Type

Site #

City/County

State

Date Ordered

Due Date

CMN

Existing DTA?

Assigned to:

Title Ordered

Title Received

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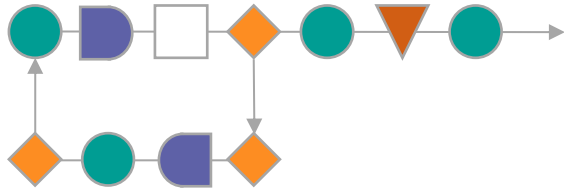
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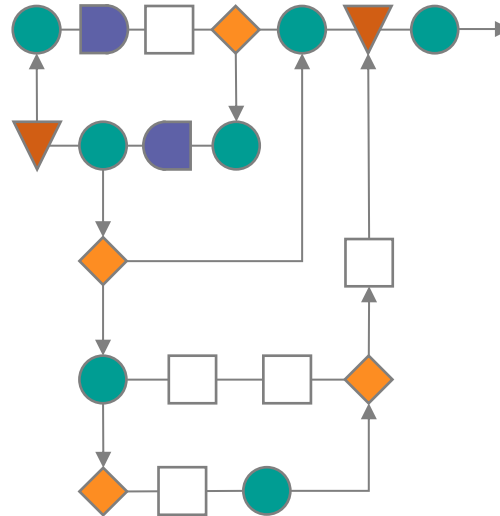
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Process Maps – 3 versions

AS WE THINK IT IS

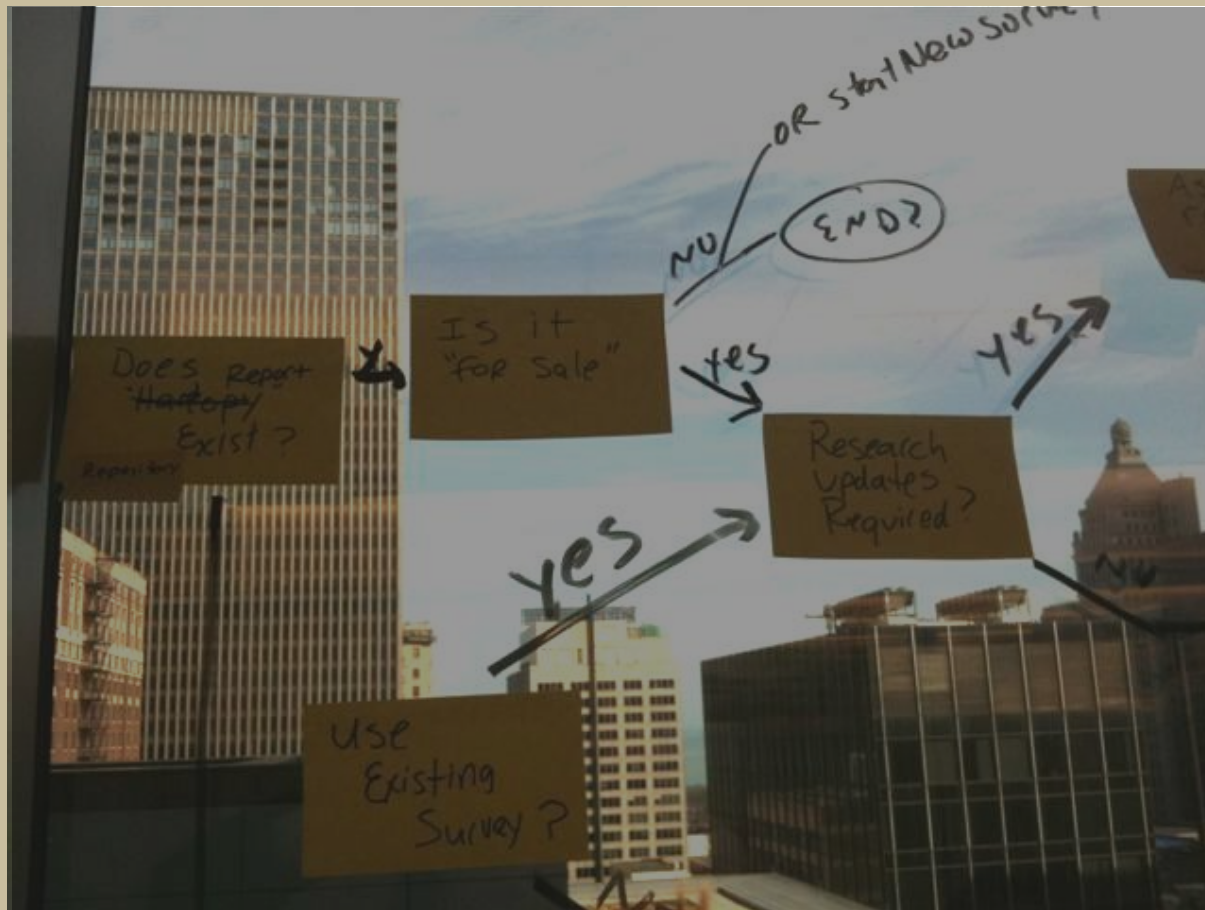


AS IT IS



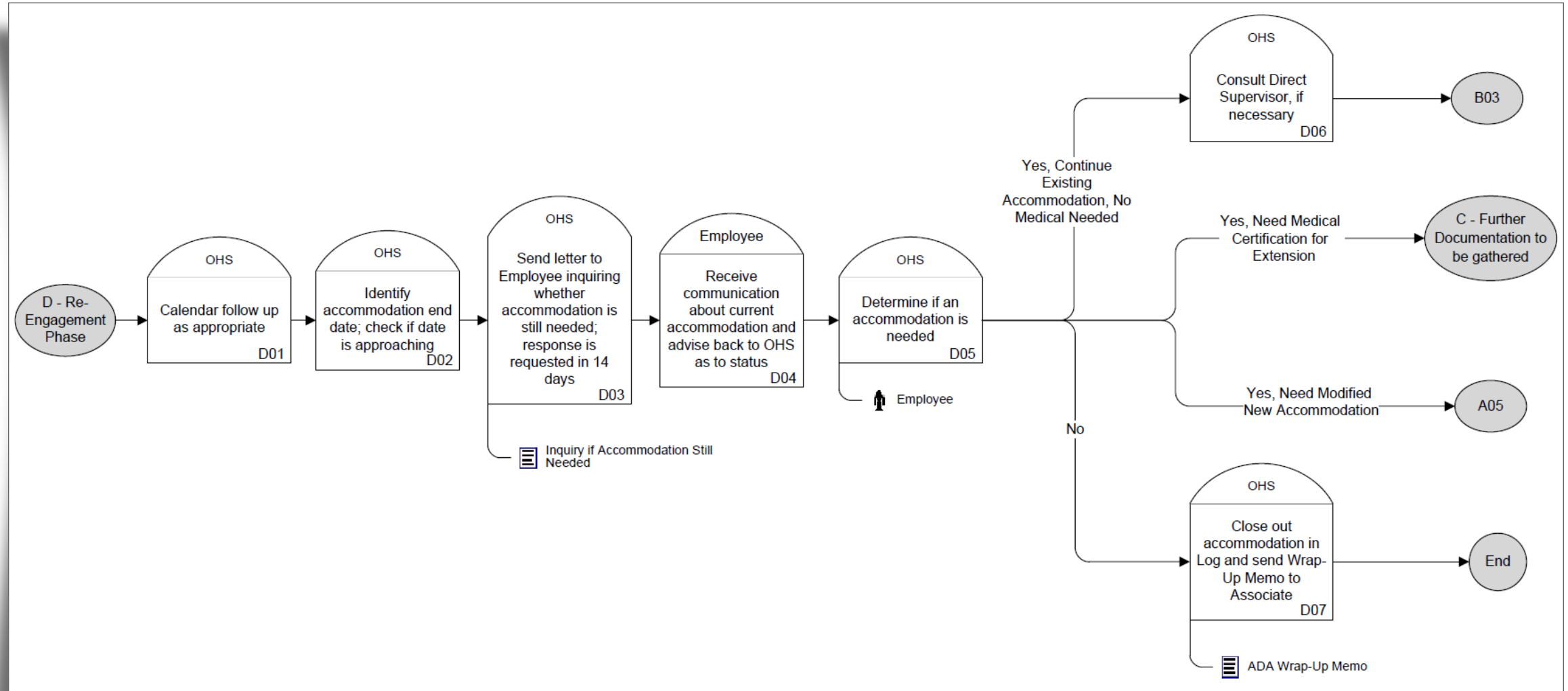
AS IT SHOULD BE





Doesn't
Require
Technology
at First ...

Sample Process Map



Case Study: Process Mapping ADA Process

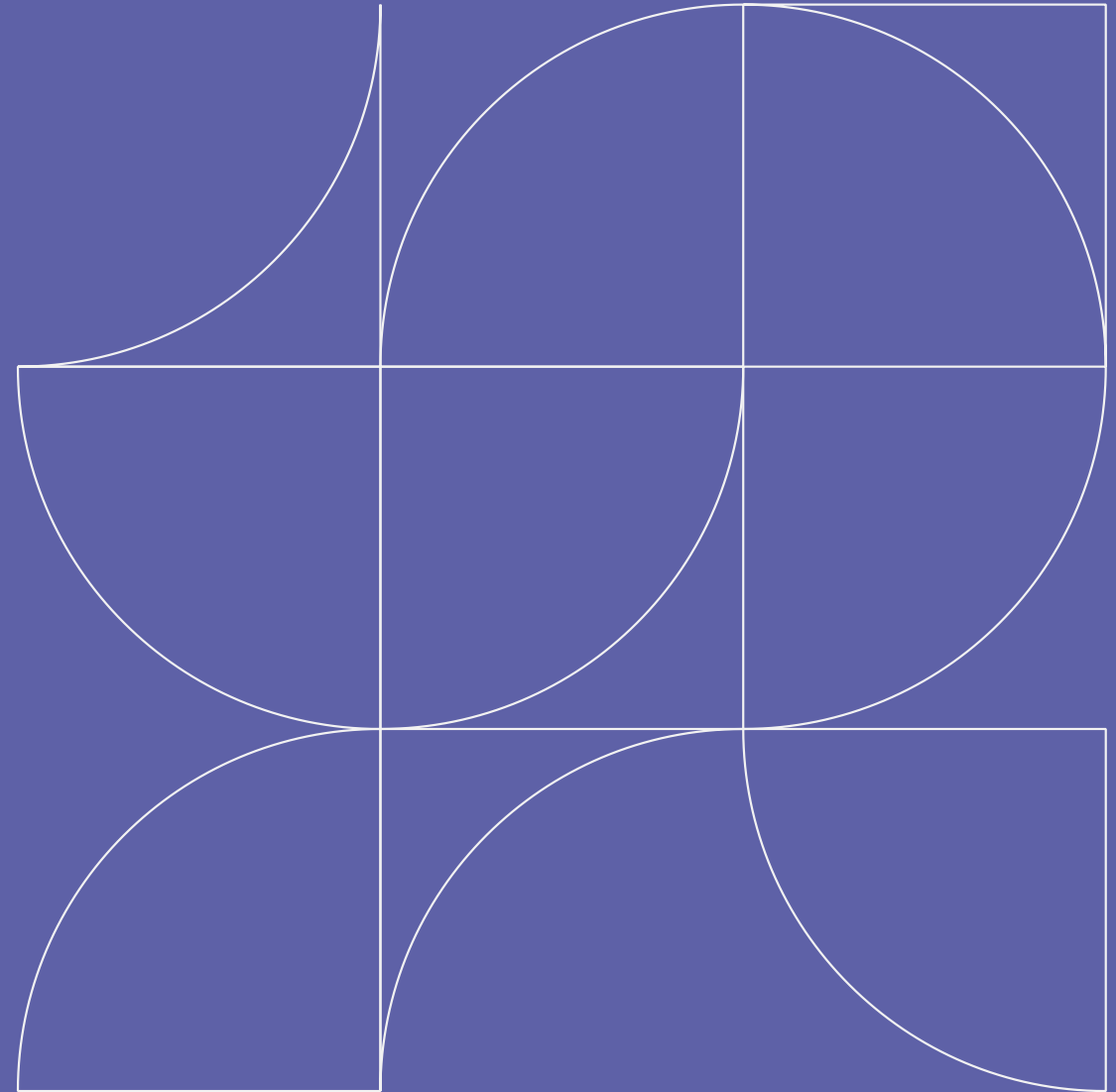


- A large hospital system was struggling with its disability accommodations process.

Key issues:

- Unclear what was being handled internally vs. by a vendor
- Leaves expired and no one was alerted
- Claims filed

Utilizing Data Driven Solutions



Case Study: Large Complex Portfolio with Many Moving Parts

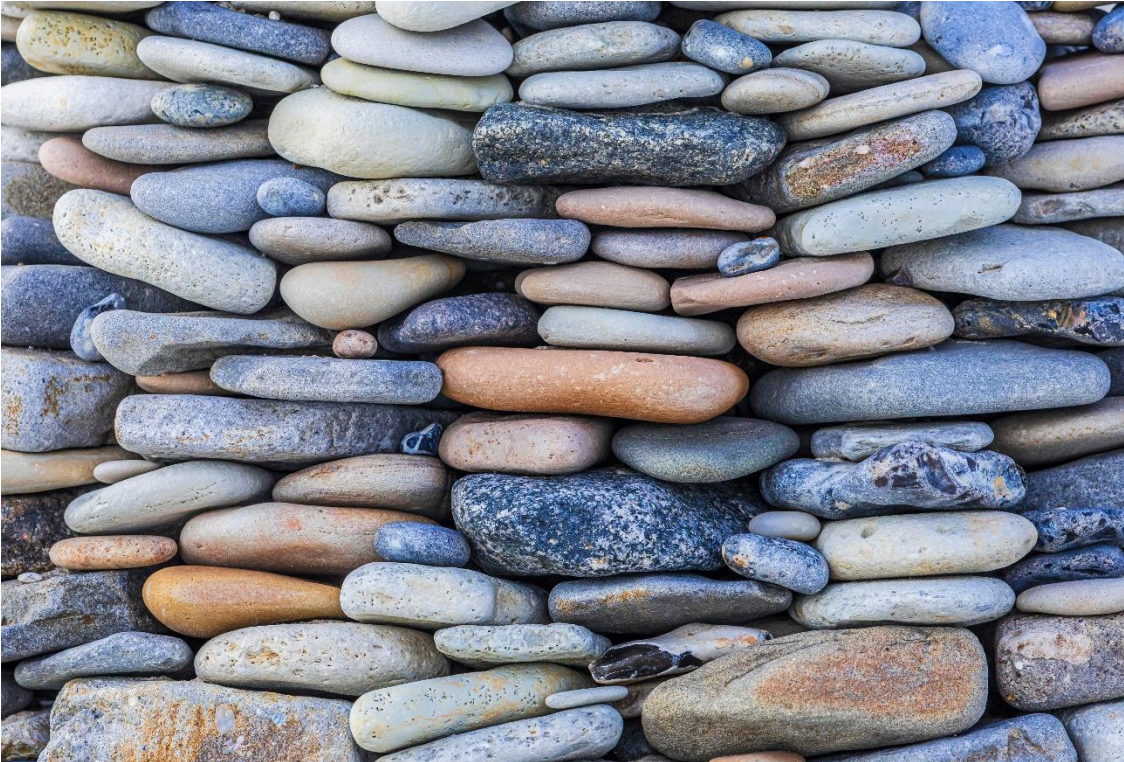


- Many cases all over the US
- Multi-jurisdictional
- Large case team with project manager
- Different in-counsel across matters
- Different levels of engagement / knowledge on in-house team

**Distilling case
insights and
knowledge for
practical and
actionable use**

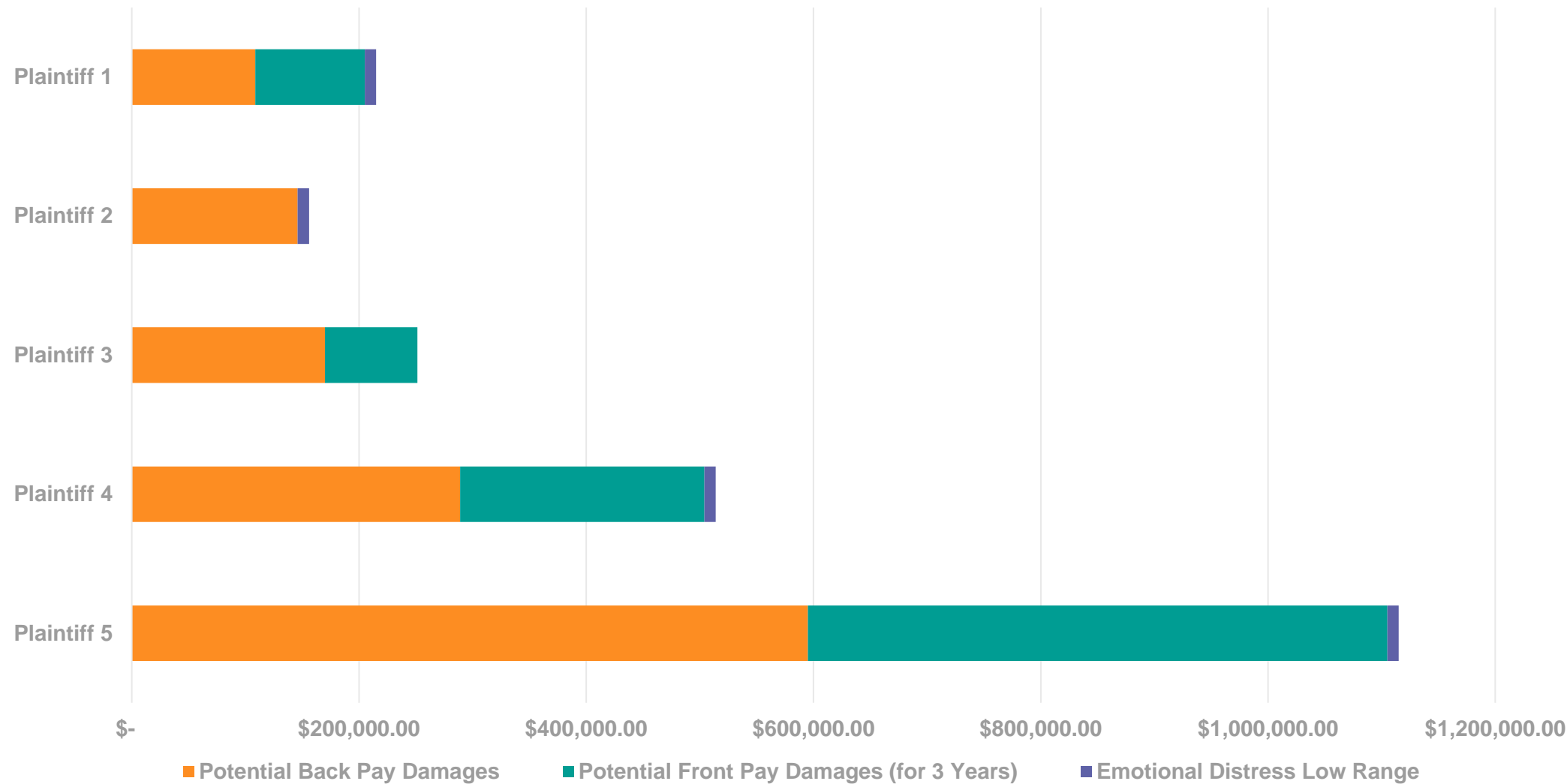


Case Study: Complex Discrimination Lawsuit

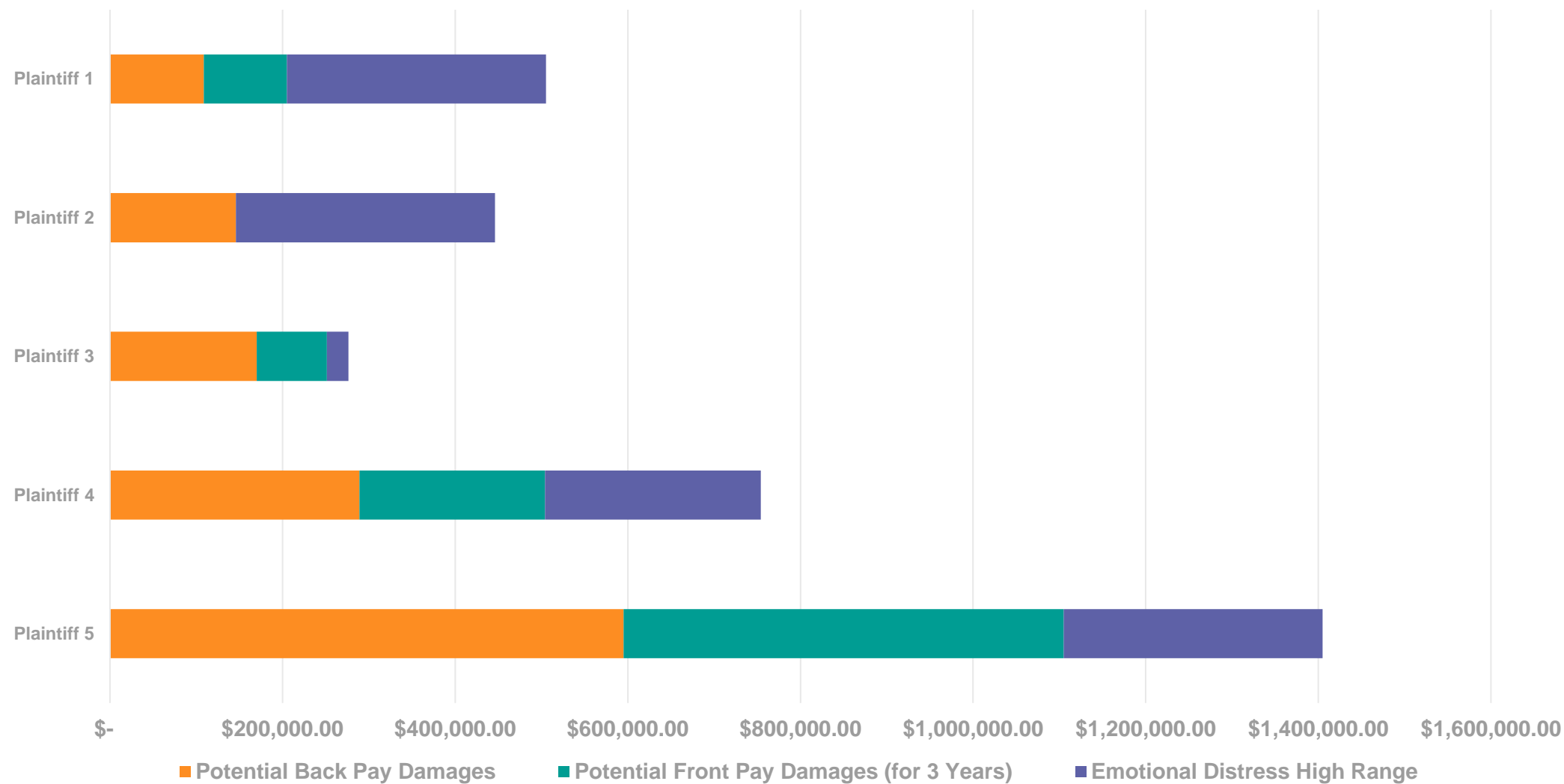


- Client faced large accommodation lawsuit with over 250 separate plaintiffs
- Different types of claims
- Different damages
- Different risk profiles
- Costly litigation
- How to think about exploring resolution?

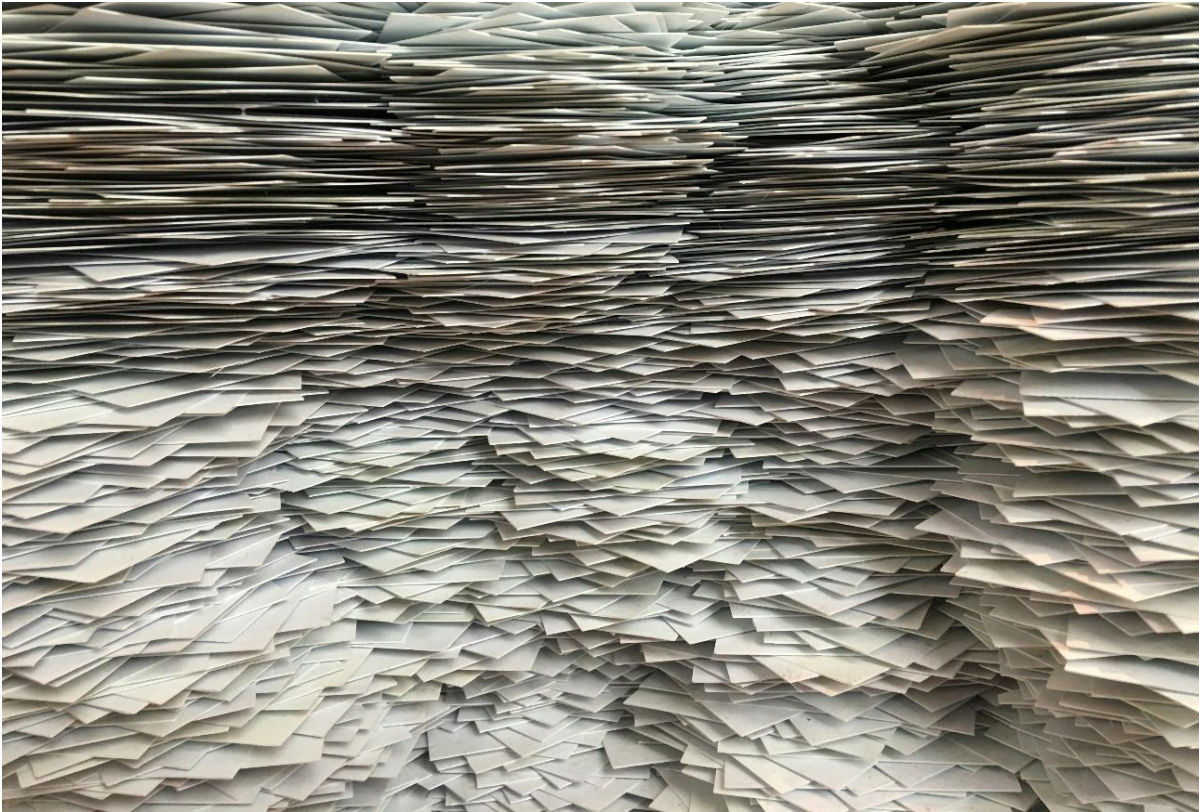
Low End Damages Estimate for Lost Wages and ED



High End Damages Estimate for Lost Wages and ED

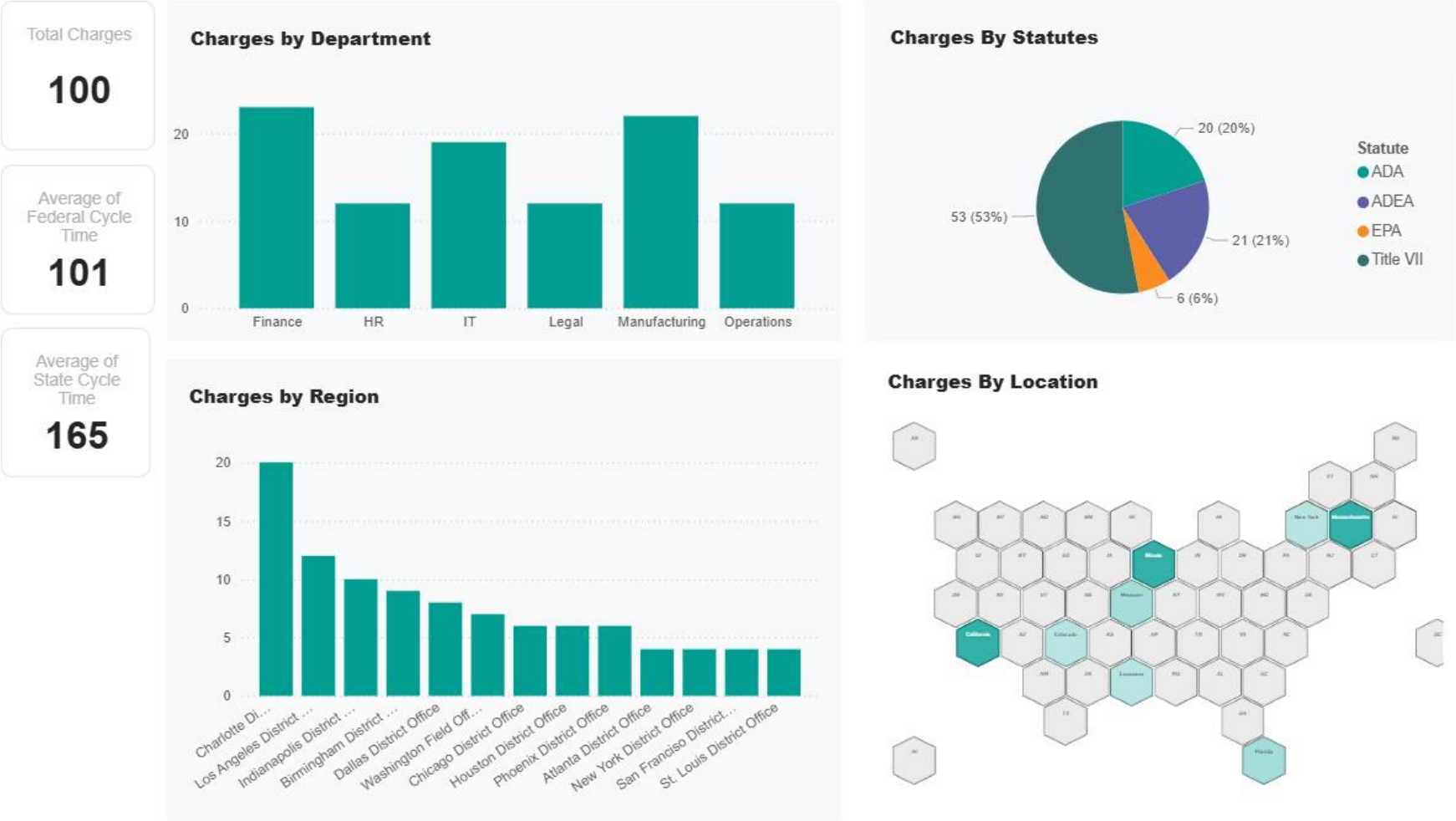


Case Study: So Many Administrative Charges



- Large companies face volume of administrative charges at EEOC / state agencies
- Various procedural stages
- Various types of claims
- Various jurisdictions
- Who is handling which?

Charge Tracker Dashboard



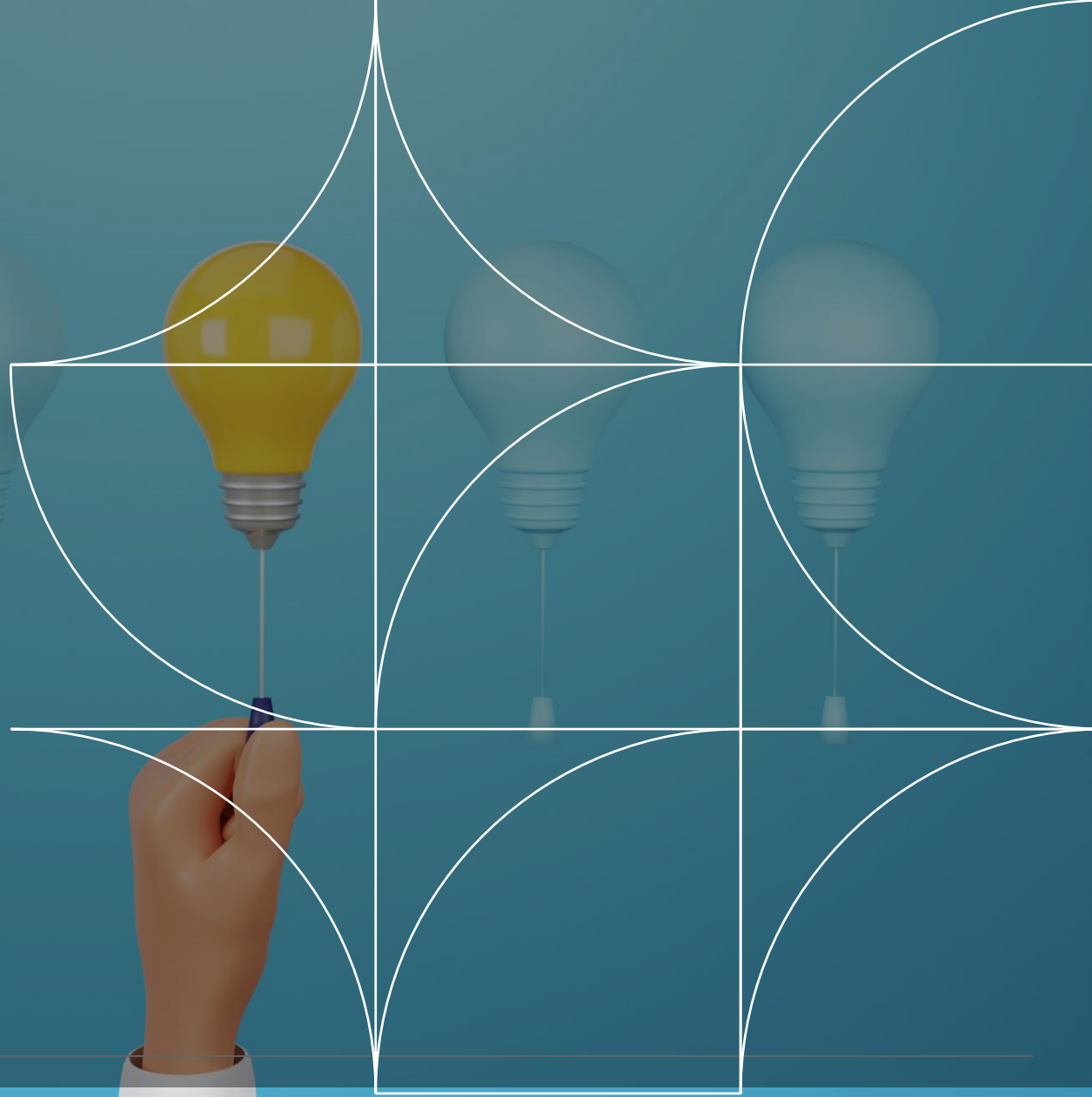
A close-up photograph of a person's hands in a light blue button-down shirt. The left hand is in the foreground, carefully placing a coin onto a stack of other coins on a light-colored wooden surface. There are three stacks of coins in total. The right hand is visible in the background, slightly out of focus, also appearing to be part of the coin-stacking activity. The lighting is soft and natural, highlighting the texture of the skin and the metallic sheen of the coins.

Case Study: How Do You Track Legal Spend?

A blue pen with a silver-colored tip and barrel accents lies diagonally across a document. The document features a bar chart with several blue bars of varying heights. The text is overlaid on the right side of the image.

Utilizing data-
driven solutions
to track and
reduce legal
spend

In-House Counsel Wisdom



A close-up photograph of a person's hands holding a smartphone. The person is wearing several rings on their fingers. The background is dark and out of focus. Overlaid on the left side of the image is the text 'Case Study: Tracking Counseling Advice' in a large, white, sans-serif font.

Case Study: Tracking Counseling Advice

Case Study: Counseling Advice Log

Counseling Advice Log ☆

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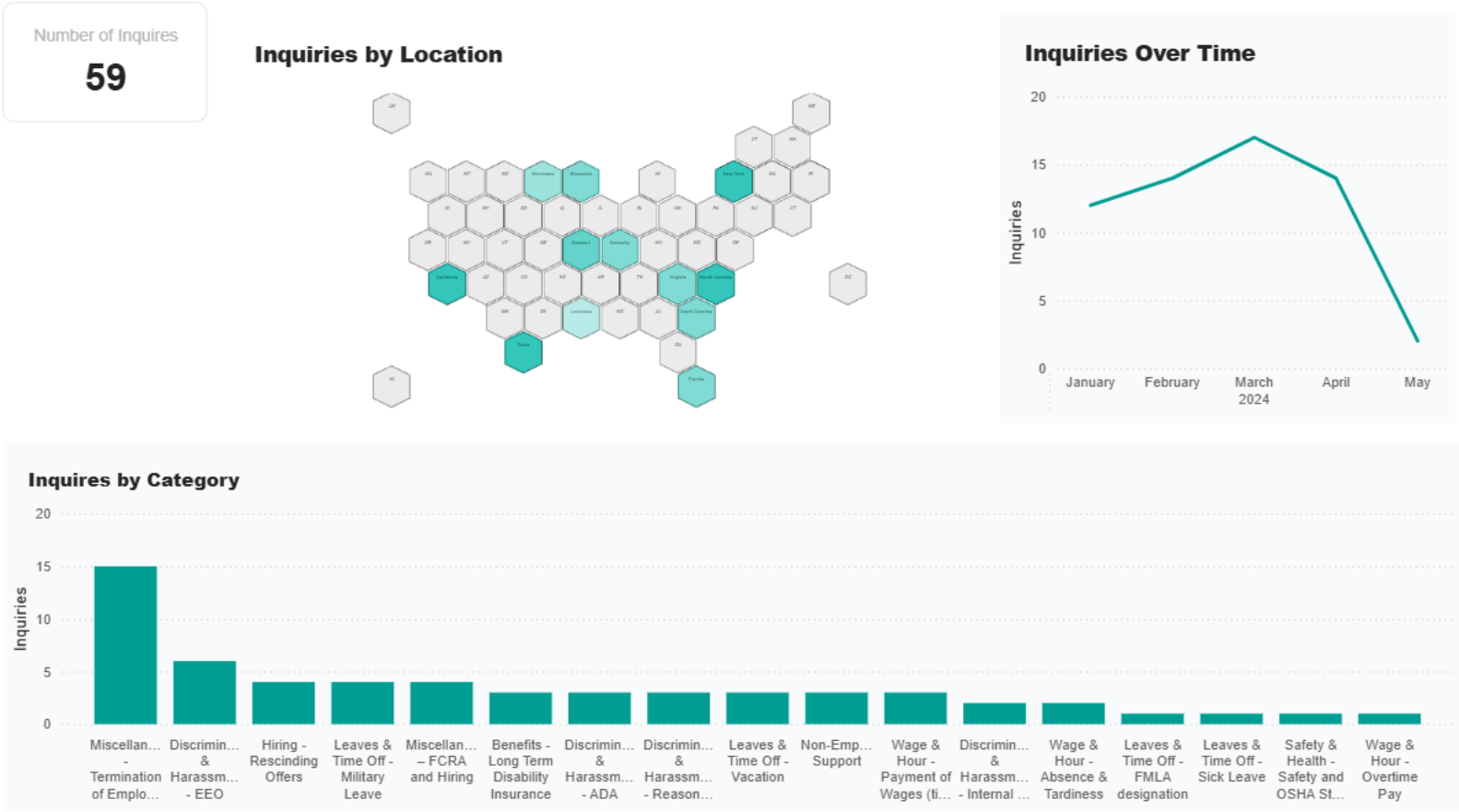
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☰ All Items ▾

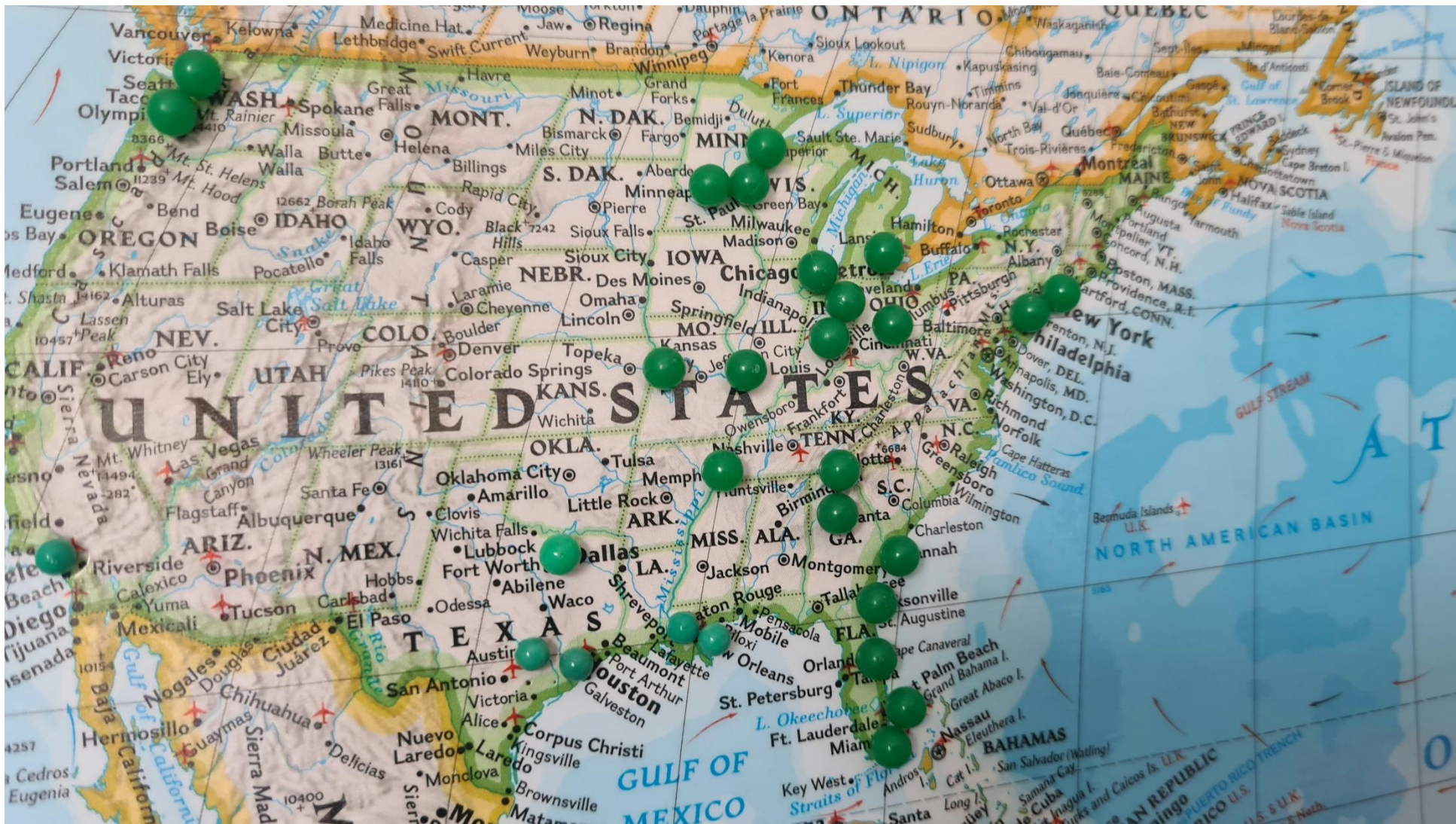
Date	Attorney		Caller	Category	Advice Given	Issue	Source	Status	Location	Business Unit	Division	Response Time
11/12/2025	McLaughlin, Ellen	✂	Billy Blue	Miscellaneous - Termination of Employment	The union does not need to be notified of the outcome of Ombuds investigation if it did not/would not result in discipline and the employee does not request that a union representative be present.	Is there a requirement that the union be notified of resolution of ombuds? Employee did not request union representation when he raised the Ombuds concern.	Counseling Hotline	Pending	California	Unit 3	Division 2	15
11/10/2025	Mesa, Chelsea	✂	Stan Tan	Miscellaneous - Termination of Employment	We reviewed the unemployment documents and advised Stan to tell employee to submit IEA description to Department in advance of hearing. Stan may make himself available to participate in telephonic hearing for sole purpose of explaining IEA and verifying former employee's receipt of IEA benefit.	Former employee was denied unemployment because Department believed that his IEA benefit was a severance payment. Employee has appealed and wants the HRM to participate in hearing.	Counseling Email	Pending	North Carolina	Unit 5	Division 1	3
1/1/2025	Perkins, Bill	✂	Virginia Perkins	Discrimination & Harassment - EEO	The text of the notice is all required by regulation. The covered veteran categories are also in line with the current regulations. Please note that the	We'd like to start sending a voluntary veteran self-ID form after our hourly job candidates accept a job offer. They currently make this election on a	Counseling Email	Resolved	South Carolina	Unit 1	Division 1	30

Case Study: Counseling Advice Log

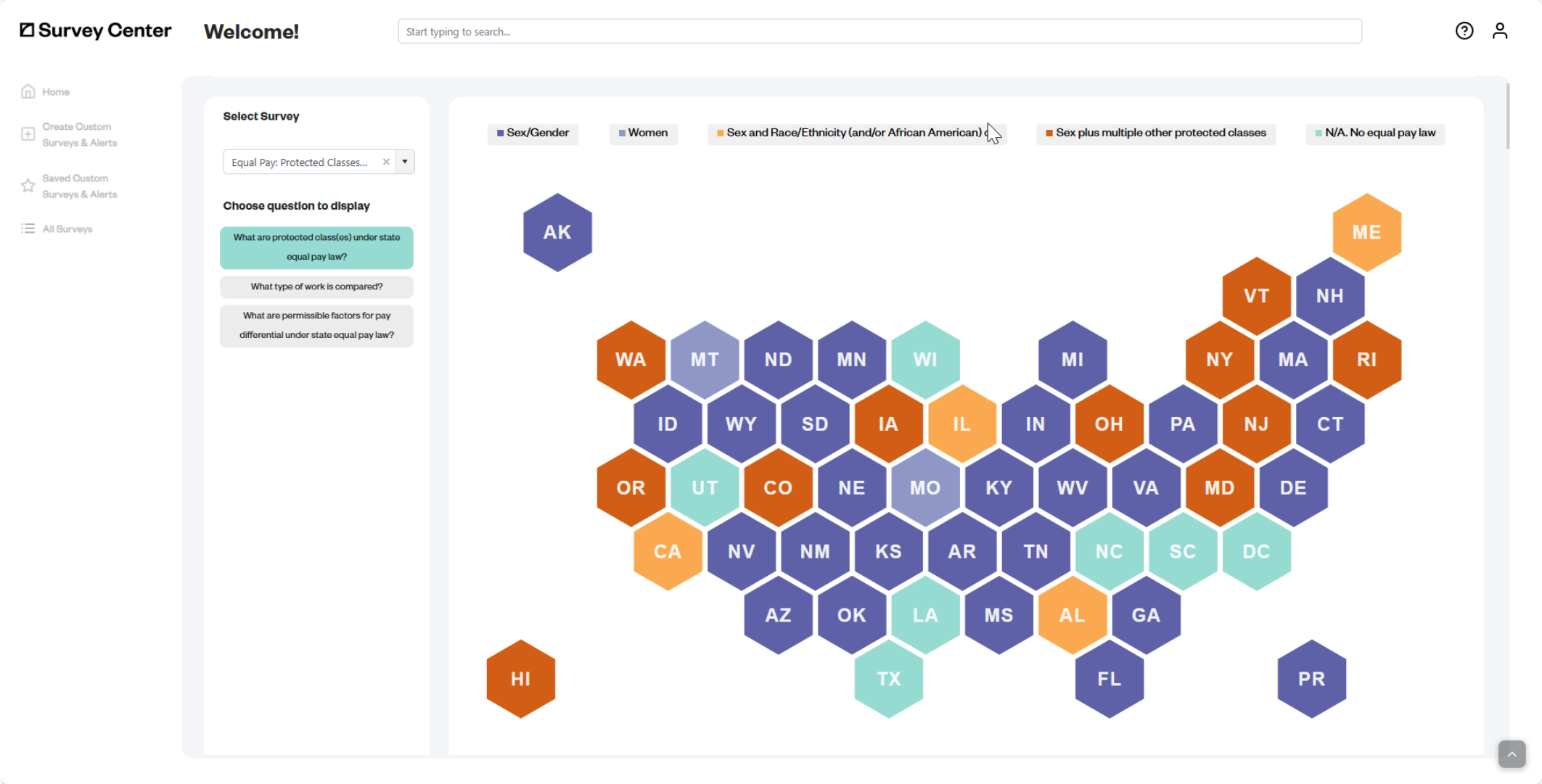
Counseling Advice Dashboard



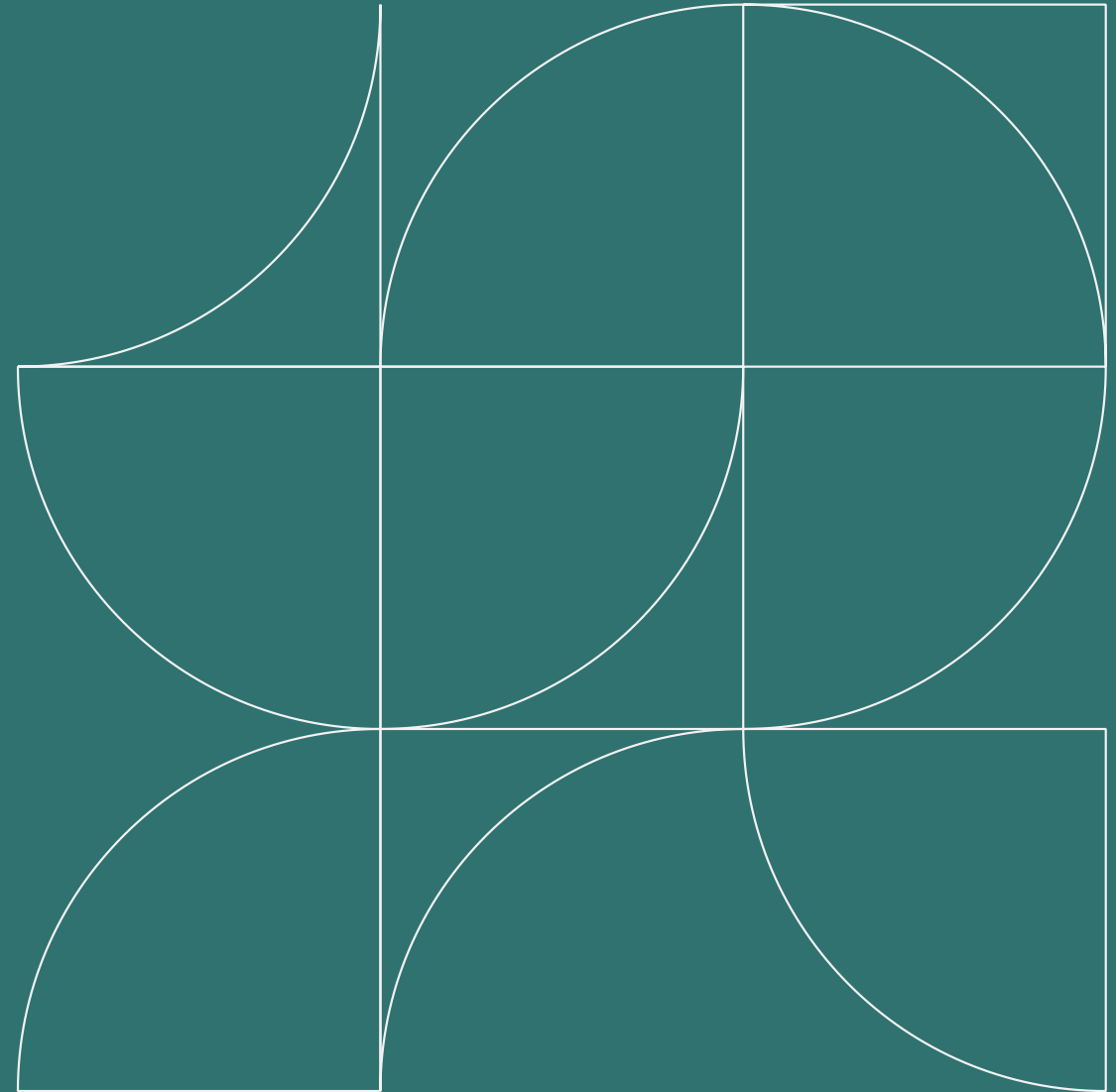
Case Study: So Many Laws in Different Jurisdictions



Case Study: Survey Center



Q&A





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Please scan the QR code to complete the digital attendance verification form to receive CLE credit for this program.

QR code directs you to our electronic form which can also be found in the calendar invite that was sent to you for this program.

You will need:

1. **Title:** How to Maximize Value from Your Outside Counsel Relationships
2. **Date Viewed:** 11/19/25
3. **Attendance Verification Code:** SS2026

State-specific CLE credit information can be found in the form.

thank you

contact information

For more information, please
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