Moderator

Frank Serge

Managing Vice President

Robert Half Legal
Consulting Solutions

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Panelists

Sean Radcliffe
EVP and General Counsel
R1 RCM

Joel Wuesthoff, JD
Managing Director
Robert Half Legal
Consulting Solutions

Trevor Torrence
Director Legal Operations
R1 RCM

Tony Abel
Managing Director
Protiviti

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Agenda

- Industry Statistics

- Contract Lifecycle Management

- Data Privacy

- Automation

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What the Statistics Show

Robert Half Legal surveyed more than 200 lawyers with hiring responsibilities at law firms and companies in the U.S.

Areas of general business or commercial law expected to offer the greatest number of job opportunities at law firms/companies planning to expand their legal teams in the next 12 months:*

40%   **Intellectual property**

37%   **Contracts and corporate transactions**

32%   **Corporate governance and operations**

32%   **Mergers and acquisitions**

*Top responses shown.

Robert Half Legal survey of more than 100 lawyers with hiring responsibilities at companies in the U.S.

67% of corporate lawyers expect their legal department's spending on LIBOR-related projects will increase in 2021.

68% of legal department budgets, on average, will be spent on data privacy-related projects in 2021.

74% of corporate lawyers said spending on data privacy-related projects has increased compared to a year ago. Volume of data is the top challenge cited by corporate lawyers in managing data privacy projects, followed by changing regulations.

Gartner:
Fundamental technologies being adopted by legal departments*

E-Billing – **48%**   Document management – **40%**

Contract lifecycle management – **44%**   IP management – **33%**

Matter management – **41%**

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What the Statistics Show

World Commerce and Contracting:
Insights from a recent member survey

84% Experience pressure for contract simplification
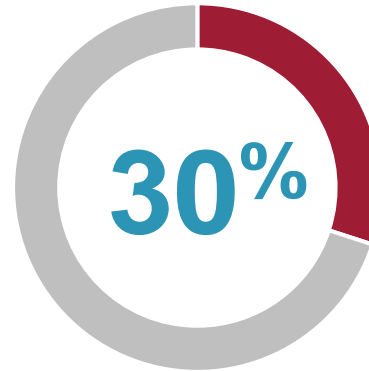
65% Focus on improved communication

81% Have plans to implement contract automation

68% Say that increasing digitization of the contract management lifecycle is a medium-high priority

9% Revenue lost by businesses each year due to poor contract management practices.

Gartner: **5 Legal Technology Trends Changing In-House Legal Departments (February 2021)**

30%

By 2025, corporate legal departments will capture only 30% of the potential benefit of their contract life cycle management investments

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What the Statistics Show

60%

60% of legal departments do not have an automated contract management tool.

82%

Contract approval time drops an average of 82% with the use of a contract management solution.

90%

Companies using contract lifecycle management solutions see 90% renewal rates.

3.4 WEEKS

Average time to create and approve a contract.

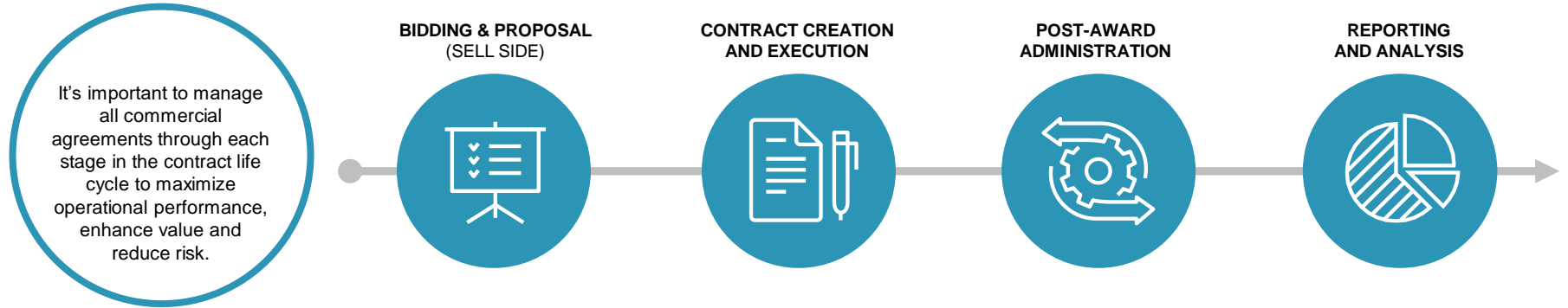**20-40 THOUSAND**

Average number of contracts per organization.

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Contract Lifecycle Management

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Contract Lifecycle Management

It's important to manage all commercial agreements through each stage in the contract life cycle to maximize operational performance, enhance value and reduce risk.

BIDDING & PROPOSAL (SELL SIDE)

CONTRACT CREATION AND EXECUTION

POST-AWARD ADMINISTRATION

REPORTING AND ANALYSIS

ASSESS CURRENT STATE

- Understand current policy, process and organization.
- Benchmark performance against leading practices.
- Aggregate and classify existing contracts.

DESIGN FUTURE STATE

- Develop and prioritize improvements.
- Determine requirements and automation opportunities.
- Create future state design.
- Develop business case.

IMPLEMENT & SUSTAIN FUTURE STATE

- Select/configure technology.
- Document detailed future state.
- Conduct training and change management.
- Monitor compliance and performance.

How to Identify What Stage You're In

Capability Maturity Model

Initial / Ad Hoc	Repeatable / Laggard	Defined / Industry Standard	Managed / Best Practices	Optimized / World Class
• No CLM tool in place, contracts stored locally • Paper-based process • Third-party paper is primarily being leveraged • No standardized process or templates • Reliant upon heroics / individuals	• Documented process, decentralized control • Repository of legacy contracts • Security-based access • Minimal meta-data, limited to no reporting • Off-contract spend still exists	• Center led control • Fully documented and standardized process • Basic CLM system, full text search • Based routing / workflow by contract type • Reporting across key meta data fields	• Fully centralized function, fully deployed CLM across enterprise with web-based authoring, terms and conditions library • Auto-matching of invoices and contracts unearths cost savings • Milestone-based alerting helps end users manage by exception • Integration with sourcing software streamlines contract creation • Business intelligence/advanced analytics are made available	• Establishing leading-edge / next best practices • A 100% paperless environment • Buy-and-sell-side contracts are centralized in a single tool • Suppliers help drive contract collaboration and savings • Cycle time tracking enables continuous improvement

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How to Support Contracts Processes

CONTRACTS DEPARTMENT PROCESSES

Managing your contract drafting, review and redlining practices	Data centralization, systems integration	Scanning and electronic manipulation of data	Accessibility of key terms in timely fashion	Challenges arising during internal projects	Contract lifecycle management
	▪ Collection of data from multiple sites ▪ CLM integration with existing procurement and IT software	Working with different types of data, including: ▪ Unstructured data ▪ Legacy data ▪ Hard copy	▪ Consistency of data ▪ Management and changes to contract terms/clause library	▪ Management reporting ▪ Data retrieval	▪ Managing your CLM system and workflow ▪ Maintaining template library and documentation

WHERE TO CONSIDER ADDING OUTSIDE EXPERTISE

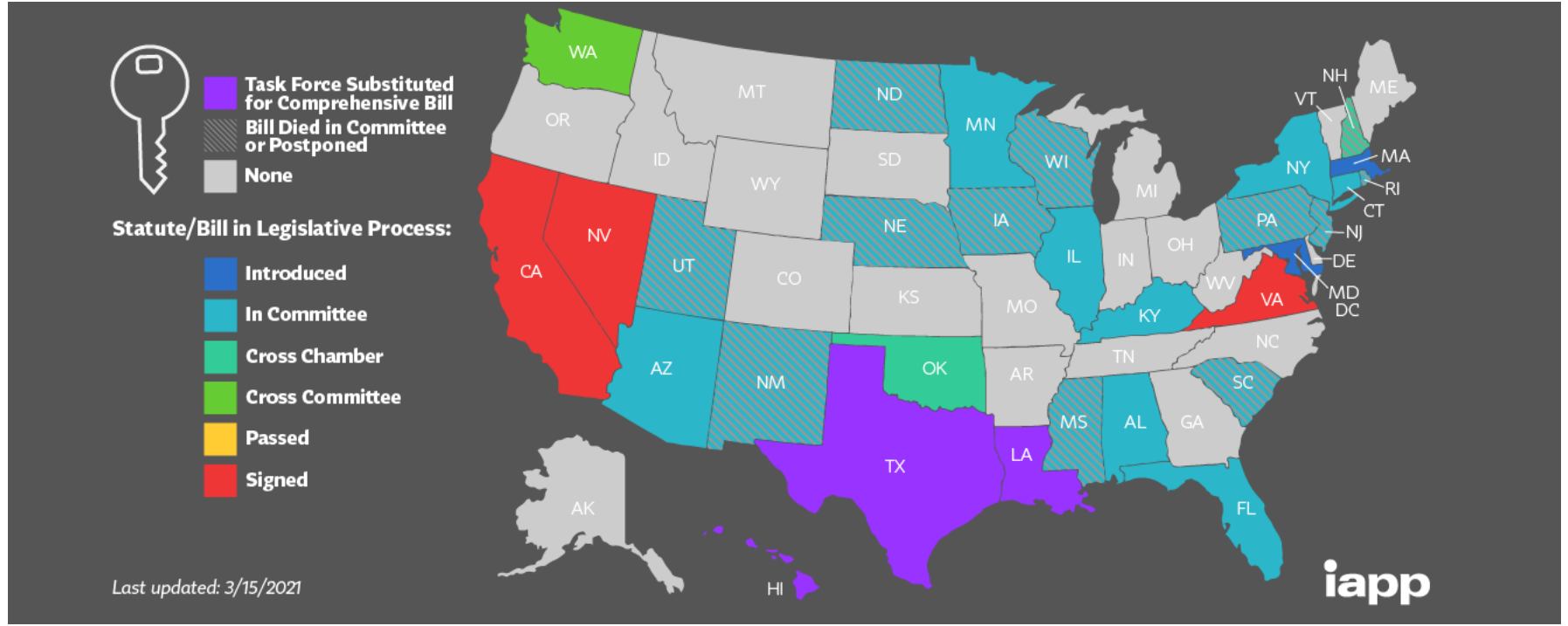| Playbook development and template review	Contracts review and redlining	Legacy contract extraction and migration	CLM technology consulting and systems integration support	Digitalization and collections support	Standardized contract templates with approved exceptions	Process improvement and efficiency gains	Compliance, performance and risk monitoring	Data analytics	CLM administration

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Which best characterizes your contract management process based on the maturity model discussed?

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Data Privacy

Privacy's impact on contracts
and contract management

State Comprehensive Privacy Law Comparison

Source: IAPP https://iapp.org/resources/article/state-comparison-table/

Task Force Substituted for Comprehensive Bill
Bill Died in Committee or Postponed
None

Statute/Bill in Legislative Process:

Introduced
In Committee
Cross Chamber
Cross Committee
Passed
Signed

Last updated: 3/15/2021

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Comparison Table

| In Session: all above states | Introduced | In Committee | Crossed Chamber | Crossed Committee | Passed | Signed | L - private right of action for security violations only
in - opt-in consent requirement
p - prohibition without consent
u - unclear
s - opt-in requirement for all sensitive data |

ᴵ California Privacy Rights Act's right of restriction/limitation is only applicable to sensitive personal data

Legislative Process: Introduced > In Committee > Crossed Chamber > Cross Committee > Passed > Signed

Further information and most recent version of the IAPP's US State Comprehensive Privacy Law Comparison can be found here

		Consumer Rights							Business Obligations					
		Right of Access	Right of Rectification	Right of Deletion	Right of Restriction	Right of Portability	Right of Opt-Out	Right Against Automated Decision Making	Private Right of Action (s = security only)	Opt-in requirement age	Notice/Transparency Requirement	Risk Assessments	Prohibition on Discrimination (exercising rights)	Purpose/Processing Limitation
State	**Legislative Process**	**Statute/Bill (Hyperlinks)**	**Common Name**											
LAWS PASSED (TO DATE)														
California		CCPA	California Consumer Privacy Act (2018; effective Jan. 1, 2020)	x		x		x	x		L	16	x			x
California ᴵ		Proposition 24	California Privacy Rights Act (2020; effective Jan. 1, 2023)	x	x	x	x	x	x	x	L	16	x	x	x	x
Nevada		SB 220/Ch. 603A	(2019; effective Oct. 1, 2019)					x					x	x		
Virginia		HB 2307	*Consumer Data Protection Act	x	x	x		x	x	x		13	x	x	x	x

ACTIVE BILLS			
Alabama		HB 216	Alabama Consumer Privacy Act
Arizona		HB 2865	
Connecticut		SB 893	
Florida		HB 1734	Florida Privacy Protection Act
Florida		HB 969	
Illinois		HB 3910	Consumer Privacy Act
Kentucky		HB 408	
Maryland		SB 0930	Maryland Online Consumer Protection Act
Massachusetts		SD 1726	Massachusetts Information Privacy Act
Minnesota		HF 1492	Minnesota Consumer Data Privacy Act
Minnesota		HF 36	
New York		A 680	New York Privacy Act
New York		SB 567	
Oklahoma		HB 1602	Oklahoma Computer Data Privacy Act
Washington		HB 1433	People's Privacy Act
Washington		SB 5062	Washington Privacy Act 2021

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Sample Considerations for Contracts*

- Review definitions to CCPA, CPRA and GDPR (e.g., definition of "sensitive personal data," "third parties," service providers)
- Breach notification obligations relating to cooperation, remediation and assistance
- Consider requiring contractor / service provider to implement data protection by design where applicable
- Negotiate responsibilities relating to data subject requests
  - Data portability
  - Right of access
  - Right to object to processing
  - Right not to be subjected to automatic processing / profiling
  - Sales rights / limitations
  - Right "to be forgotten"
  - Right to rectification

- Documented instructions
- Authorization regarding subcontracting
- Record keeping and production
- Obligations relating to data protection impact assessments
- Acceptance to audits/inspections (including onsite where appropriate)
- Data security representations
- Address use of specific technical measures, such as pseudonymisation or encryption
- Cooperation with respect to regulatory authorities
- Assess obligations relating to Data Protection Officers
- Cross-border transfers (Schrems II)
- Insurance and indemnifications
- Obligation to delete / return

Illustrative considerations only. Decisions driven by jurisdictional requirements, nature of relationship, party's risk tolerance, negotiating power, etc.

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Key Privacy Contractual Drivers

Increased Privacy Regulations

As the collection, use and storage of personal information has grown, countries throughout the world have turned their attention to regulating those activities. Some recent privacy regulations include GDPR and CCPA.

Consumer Control

With the increase in data collection, the threats to that data have grown. The proliferation of data breach incidents and social profiling has made employees, consumers and customers sensitive to the risks associated with unauthorized disclosure of personal information.

Growth of Vendor Networks

The growth in the use of vendors has increased the need to manage an extended network of suppliers, contractors, consultants and other third parties with access to corporate data.

Globalization

Technology has allowed businesses to rapidly increase their global reaches and interface with international customers, often without a physical presence in the jurisdictions where they serve customers.

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Contractual Challenges

Regulations

- Keeping up with the pace of technology explosion
- The GDPR is one of the few progressive privacy laws that govern automated profile decisioning with narrow exclusions
- Fewer laws support transparency and accountability in handling of personal data
- Newer privacy laws are aimed at providing substantial rights and control to consumers over their personal data. There are laws specific to facial recognition and biometrics

Privacy Preserving Technologies

- Privacy-minded organizations embed Privacy-by-Design to build/retain consumer trust and provide transparency. Examples include use of:
  - Blockchain
  - Homomorphic encryption
  - AI-powered security
  - Federated training on AI datasets

Data Governance

- In the era of data collection and sharing, knowing where the data is, and establishing process accountability and transparency is critical:
  - Data minimization, purpose limitation and execute jurisdiction-based retention policy
  - Reduce liability
  - Prevent data breach

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Foundational Questions for Contracting

The key objective of the Privacy and Data Protection Program is to maintain lawful, fair, secure, and confidential treatment of personal information while enabling individuals to execute their privacy rights. The following lifecycle of ongoing compliance activities will help organizations implement and maintain appropriate privacy and data protection practices across all applicable privacy regulations.

Monitor

- Are we compliant?
- Can we prove it?
- How do we know if our program is successful?
- Do we engage audit teams?
- Do we report to the board?
- Have we been audited or reported by the regulators?

Identify

- Do we know what data we have?
- Do we know where it resides?
- Do we know how it is being used?
- Where does the data travel?

Privacy and Data Protection Program

Execute

- Do we know who is responsible for what?
- Does the business understand their obligations?
- Does the IT understand their obligations?
- Have they formally accepted responsibility?
- How does legal and information security integrate with DPO team?

Assess

- Do we classify our data?
- Do we evaluate privacy risk of our operations?
- Do we evaluate data protection risk of our data?
- Do we engage in high-risk processing activities that may require additional controls?

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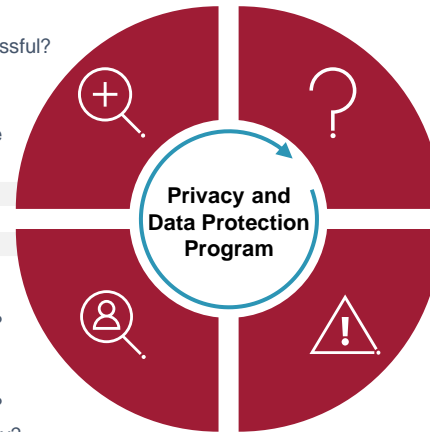
How GDPR Regulates AI or Intelligent Automation

Privacy Governance and Accountability

- Data Protection Officer
- Legal Basis for Processing
- Privacy-by-Design
- Data Protection Impact Assessment
- Records of Personal Data Processing Activities (RoPA)
- Privacy-by-Design

Organizational and Technical Controls
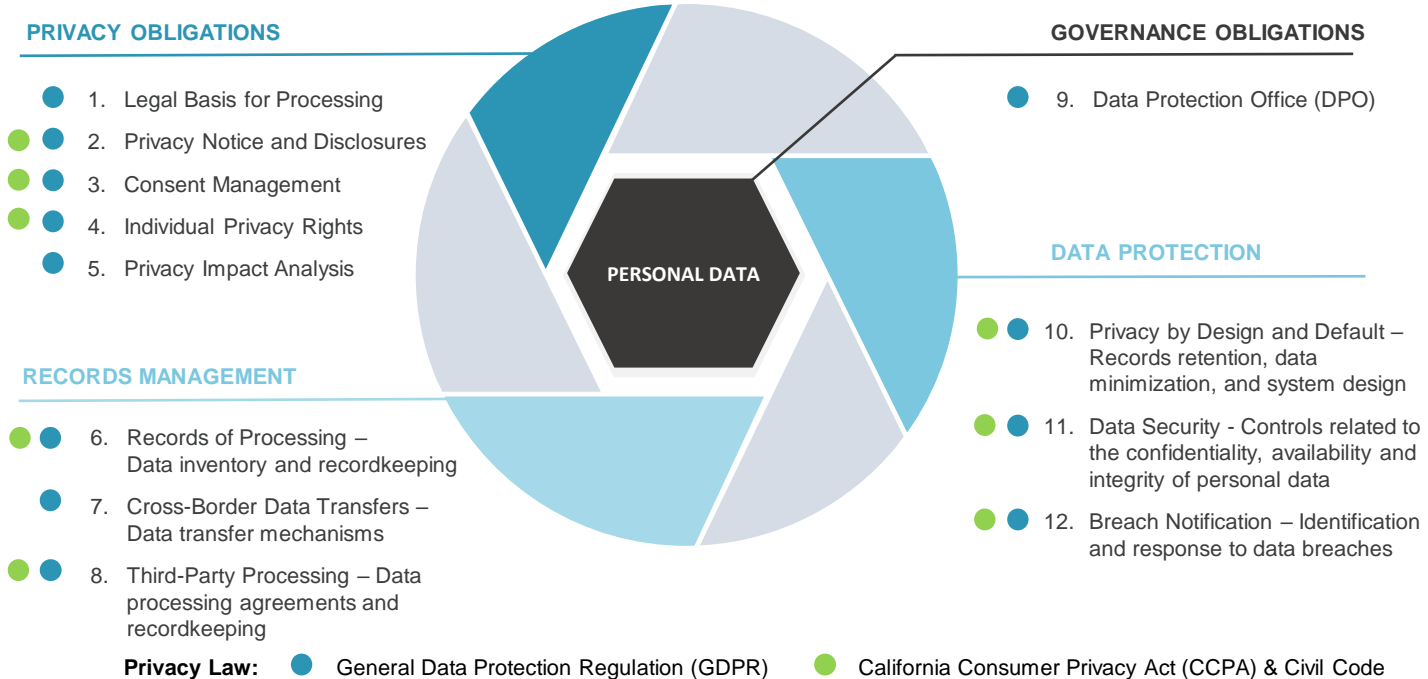
- Security Controls
- Data Accuracy
- Third-Party Data Transfer Agreements

Data Subject Rights

- Rights of the Data Subject
- Right to Explainability on Automated Decision Making (ADM) and Restriction on ADM

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Regulatory Requirements GDPR vs. CCPA

PRIVACY OBLIGATIONS

1. Legal Basis for Processing
2. Privacy Notice and Disclosures
3. Consent Management
4. Individual Privacy Rights
5. Privacy Impact Analysis

RECORDS MANAGEMENT

6. Records of Processing – Data inventory and recordkeeping
7. Cross-Border Data Transfers – Data transfer mechanisms
8. Third-Party Processing – Data processing agreements and recordkeeping

PERSONAL DATA

GOVERNANCE OBLIGATIONS

9. Data Protection Office (DPO)

DATA PROTECTION

10. Privacy by Design and Default – Records retention, data minimization, and system design
11. Data Security - Controls related to the confidentiality, availability and integrity of personal data
12. Breach Notification – Identification and response to data breaches

Privacy Law: ● General Data Protection Regulation (GDPR)   ● California Consumer Privacy Act (CCPA) & Civil Code

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How would you characterize the impact of various privacy statutes on your industry?
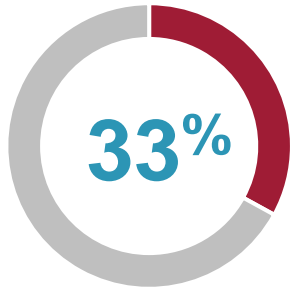
1. **Little-to-no impact**
2. **Moderate impact**
3. **Significant impact**

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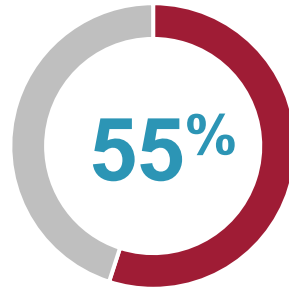
Automation

Impact of technology, automation and machine learning on contract lifecycle management

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33%

of corporate transaction work is automated by the average legal department as of 2019.

55%

of corporate transaction work is automatable according to the legal departments surveyed.

87%
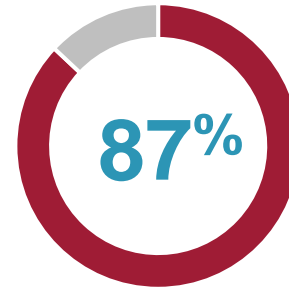
of legal departments surveyed in 2020 expected their total number of in-house, full-time employees to stay the same or decrease.

50% of legal work related to major corporate transactions will be automated within legal departments by 2024.

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Enterprise Contract Lifecycle Management

System Automation Opportunities (Examples)

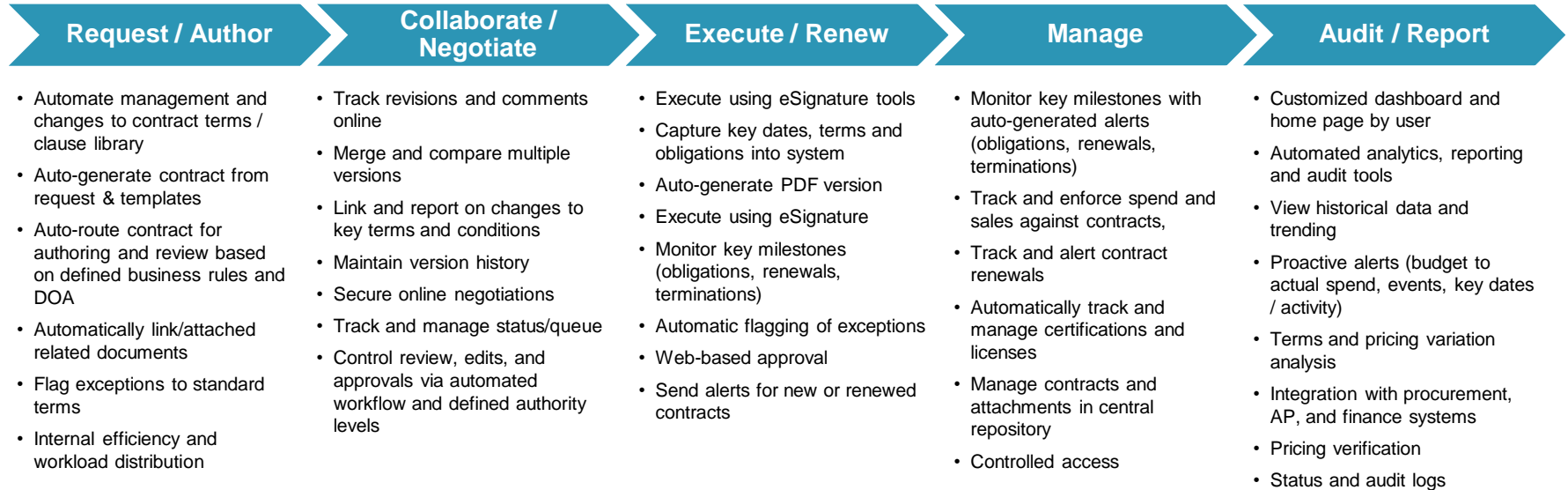| Request / Author	Collaborate / Negotiate	Execute / Renew	Manage	Audit / Report
• Automate management and changes to contract terms / clause library • Auto-generate contract from request & templates • Auto-route contract for authoring and review based on defined business rules and DOA • Automatically link/attached related documents • Flag exceptions to standard terms • Internal efficiency and workload distribution	• Track revisions and comments online • Merge and compare multiple versions • Link and report on changes to key terms and conditions • Maintain version history • Secure online negotiations • Track and manage status/queue • Control review, edits, and approvals via automated workflow and defined authority levels	• Execute using eSignature tools • Capture key dates, terms and obligations into system • Auto-generate PDF version • Execute using eSignature • Monitor key milestones (obligations, renewals, terminations) • Automatic flagging of exceptions • Web-based approval • Send alerts for new or renewed contracts	• Monitor key milestones with auto-generated alerts (obligations, renewals, terminations) • Track and enforce spend and sales against contracts, • Track and alert contract renewals • Automatically track and manage certifications and licenses • Manage contracts and attachments in central repository • Controlled access	• Customized dashboard and home page by user • Automated analytics, reporting and audit tools • View historical data and trending • Proactive alerts (budget to actual spend, events, key dates / activity) • Terms and pricing variation analysis • Integration with procurement, AP, and finance systems • Pricing verification • Status and audit logs

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Tools, Methodology and Platforms

Analytics tools allow for more intelligent searching, stronger incorporation of specialists' judgments and sampling, and the latest visualization tools to enable greater review efficiency and transparency.

IN-DEMAND SERVICES

- Predictive coding and technology-assisted review
- AI with continuous active learning
- Primary language identification
- Natural language processing
- Concept search, clustering and categorization
- Keyword expansion
- Similarity ranking, near duplicate detection
- Repeated content identification
- Email threading

METHODOLOGY AND SOFTWARE PLATFORMS

- **Technology-agnostic eDiscovery practices** work closely with technology providers to develop repeatable workflows flexible to any platform, leveraging the leading predictive coding engines, relational analytics and project management tools to maximize effectiveness and minimize costs.

- **Risk-focused consultancies** leverage the technical capabilities and quality control methodologies of testifying specialists to aid clients in defensibility arguments and meeting obligations to the court.

SAMPLE OF POPULAR CLM PLATFORMS

- Icertis
- Conga
- SAP Ariba
- LinkSquares
- Scout RFP
- DocuSign CLM
- Gatekeeper
- Cobblestone
- Contract Logix
- Oracle Procurement Cloud

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Legacy Contract Review and Conversion

Manual Review

- Dedicated document review centers across North America (workstations, printers, OCR-enabled scanners, independent servers and secured connectivity, physical security / surveillance)

- Legal project teams and staffing (file clerks, paralegals, JDs, licensed attorneys) to identify existing contracts (electronic search, manual search, survey), review contracts and extract relevant meta data and create contract summaries / abstracts for upload into contract management system

- Ideal solution for smaller scale projects (<5,000 documents/contracts, minimal data points)

Machine Learning Assisted

- Machine learning systems convert documents into OCR and text files. Through machine learning and algorithms, programs can recognize key terms and export the relevant data.

- Once all data has been reviewed and confirmed, the OCR contracts, text files, and targeted meta data can be provided to the client.

- This is an optimal solution for large scale and highly complex projects (>5,000 documents/contracts, multiple data points)

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How likely is your organization to fully embrace contract automation in the next one to three years?

1. **Not likely**
2. **Somewhat likely**
3. **Most likely**
4. **Absolutely**

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Thank you

Appendix

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Additional Resources

Surveys and Reports:

Gartner:

State of the Legal Function, September 2020
https://www.gartner.com/en/legal-compliance/trends/legal-state-of-the-function

5 Legal Technology Trends Changing In-House Legal Departments, February 2021

https://www.gartner.com/smarterwithgartner/5-legal-technology-trends-changing-in-house-legal-departments/

World Commerce and Contracting (previously International Association of Contract and Commercial Managers Inc., or IACCM):

https://www.worldcc.com/Research-Analytics/Latest-Research

IAPP: State Comprehensive Privacy Law Comparison

https://iapp.org/resources/article/state-comparison-table/

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Sean Radcliffe
EVP, General Counsel, R1 RCM

PROFESSIONAL EXPERIENCE

Sean Radcliffe joined R1 in February 2017 and serves as Executive Vice President and General Counsel. Sean has over two decades of experience guiding corporations through a wide range of business and legal matters, including strategic planning, intellectual property protection, client and vendor engagement, human resources, mergers and acquisitions, and all aspects of public company compliance.

Prior to joining R1, Sean served as General Counsel at Ciber, Inc., a nearly $800M public company providing global information technology consulting and outsourcing to commercial clients. Prior to Ciber, Sean spent eight years as Chief Corporate Counsel and Chief Compliance Officer at IHS, helping to build a global intellectual property portfolio. Prior to that, he worked as a senior attorney at WilTel Communications, a major telecommunications firm. During his 20-year law career Sean also served at three Tulsa, Oklahoma-based law firms.

CONTACT INFORMATION

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AREAS OF EXPERTISE

- Strategic Advice to Senior Management and Board of Directors
- Design of Compliance Programs to Mitigate Risks and Optimize Opportunities
- Business Process Improvement and Innovation
- Benefit Plan Compliance and Oversight
- Public and Private Securities Transactions and Compliance
- Corporate Secretary and Governance Expert
- •Independent Judgment and Collaborative Leadership for a Growing Business
- Driving Business Ethics as a Competitive Advantage
- Sales Process Design & Customer Relations
- Persuasive Communication
- M&A Transactions and Integration
- Leading Change Management
- Regulatory Compliance, Investigations, Negotiations, and Defense
- Staff Development and Mentoring

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Trevor Torrence

Director Legal Operations, R1 RCM

PROFESSIONAL EXPERIENCE

With a passion for innovation and efficiency, Trevor drives development of modern law departments. He defines and automates processes around litigation management and contract review with over 10 years of experience at Sears Holdings and now R1 RCM. Uniquely positioned with his background in computer science (BS, University of Michigan) and law (JD, Chicago-Kent College of Law), he focuses on people, processes, and technology to define legal operations as a critical role for corporate law departments.

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Tony Abel
Managing Director, Protiviti

PROFESSIONAL EXPERIENCE

Tony is a Managing Director in Protiviti's Supply Chain Solutions Practice and also the head of Protiviti's Intelligent Process Automation practice. He is a distinguished consulting executive with particular strength in business transformation and automation, focusing on cost reduction, efficiency, and risk management initiatives. His supply chain, procurement and automation qualifications have been achieved through experiences in industry, management consulting and outsourcing environments.. He's been providing performance improvement solutions to Fortune 100 companies for 20+ years across a variety of industries.

RELEVANT EXPERIENCE

Led the establishment of Protiviti's RPA solution, including training and certification of 350+ consultants, developing alliance relationships with top RPA vendors and driving development of 1,000+ bots through sprints and hackathons to expand Protiviti's market share in the digital space.

Former North American Lead of Accenture's Procurement and Supply Chain BPO Delivery Operations, managing delivery for $173M in service revenue with responsibility for 160+ US-based delivery resources across 53 key accounts.

Former Midwest Lead for Capgemini's Procurement Practice, responsible for strategic planning and delivery of procurement-related consulting services, including 40+ person organization, $45M P&L, account planning, and business development.

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KEY INITIATIVES

Led the procurement organization for a large consumer electronics retailer, managing $3.6 billion of GNFR (goods not for resale) spend and addressing $1 billion annually to deliver more than $370 million in savings over four years. Reduced cost-to-serve by 22% while increasing customer satisfaction more than 18% during the same period.

Directed development of the RPA capability for a Fortune 100 multi-line healthcare enterprise, supporting automation of critical business processes, including claims audit and reimbursement validation

Extensive media coverage and published content, including ZDNet, Total CIO, CFO.com, TechTarget, and recipient of the Pro to Know award from Supply & Demand Chain Executive magazine.

AREAS OF EXPERTISE

- Process Automation Strategy
- Intelligent / Robotic Process Automation
- Vendor Management & Governance
- Contract Lifecycle Management
- Supply Chain Optimization
- Procurement Transformation
- Compliance & Risk Management
- Strategic Sourcing
- Organization Design
- Process Design & Implementation
- Change Management

INDUSTRY EXPERTISE

- Manufacturing
- Healthcare
- Insurance
- Retail
- Pharmaceuticals
- Aerospace & Defense
- Government
- Publishing
- Telecommunications
- Chemicals
- Technology

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Joel Wuesthoff, JD
Managing Director, Robert Half Legal Consulting Solutions

PROFESSIONAL EXPERIENCE

Joel Wuesthoff is a former practicing attorney, Certified Information Systems Security Professional (CISSP), Certified Third Party Risk Professional (CTPRP) and a Managing Director for Robert Half's Legal Consulting Solutions in New York. With 20+ years of legal practice and consulting work in high stakes litigation and government investigations, he has led information governance engagements and privacy & security assessments for complex enterprises, working with general counsel's offices, Chief Risk Officers, audit committees and IT departments to improve risk postures resulting from privacy mandates and security imperatives. Mr. Wuesthoff works with clients to identify solutions for managing cybersecurity, privacy and related Big Data challenges and social media application growth, helping to align legal objectives with IT department priorities and responsibilities, and develop process and protocol manuals to standardize the entire risk management process.

REPRESENTATIVE WORK

- Led privacy and security engagement relating to the General Data Protection Regulation ("GDPR") for a global medical devices company doing business in over 31 different countries.
- Served as senior advisor for international messaging company undergoing a GDPR gap assessment across business units
- Retained as legal subject matter expert for global media company relating to an eDiscovery program management and cross border transfer mechanisms
- Served as engagement manager to conduct a Data Protection Impact Assessment for global insurance carrier in the context of identifying high risk profiling relating to GDPR compliance
- Contributed to industry agnostic standards initiatives for third party assessment and governance requirements relating to ISO 27000 and NIST security standards
- Developed risk tolerance and metrics protocols for national retailer across multiple compliance drivers, including privacy, security, records management, eDiscovery and litigation.

As a CISSP and former attorney, Mr. Wuesthoff has a unique ability to navigate the complex legal and technical issues created by network breaches and data privacy violations, as well as experience in advising companies on the role and relevance of information privacy and security regulations.

CONTACT INFORMATION

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AREAS OF EXPERTISE

- Security & Privacy Law
- Electronic Discovery and Evidence
- Corporate Governance, Risk and Compliance

INDUSTRY EXPERTISE

- Healthcare
- Financial Services
- Litigation & Investigations
- Technology and Software

EDUCATION/QUALIFICATIONS

- J.D., Vermont Law School
- B.A., McGill University

PROFESSIONAL MEMBERSHIPS & CERTIFICATIONS

- Certified Information Systems Security Professional (CISSP)
- Certified Information Privacy Professional/Europe (CIPP/E)
- American Bar Association's Fall Meeting: Cybersecurity: A Unified Approach across Public Markets [DFARS & NIST 171/53]
- Author: A Look at the Cybersecurity Legal Landscape in 2017: The State of the Law and Potential Liability
- Co-author of "Topical Issues in Cross Border Discovery; Reconciling Personal Data Regulations and International Guidelines, 5th Annual Sedona Conference International Program, Zurich 2013
- Author, Sedona Conference Writing Committee, Cyber Liability Issues and Recommendations

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Frank Serge

Managing Vice President, Robert Half Legal Consulting Solutions

PROFESSIONAL EXPERIENCE

Frank Serge is managing vice president for Robert Half Legal's consulting solutions practice where he provides consultation and support to law firms and corporate legal departments to create operational efficiencies, mitigate risks, reduce costs, and design customized eDiscovery solutions. His previous position was vice president of consulting services. In his current role, he serves as a business partner to multiple Fortune 1000 companies and AmLaw firms in the Chicago area.

Mr. Serge is a frequent speaker at leading industry events on the topics of cost containment, data privacy, contracts management and utilization of AI by legal teams.

Prior to joining Robert Half in 2013, Mr. Serge worked for eight years at a large eDiscovery services firm, providing discovery and managed support services for the legal and corporate markets. He held direct sales and sales management positions with that organization and served as the legal solutions director of sales in Chicago.

INDUSTRY EXPERTISE

Mr. Serge has more than 13 years of experience in applying creative solutions to minimize costs and maximize efficiencies throughout the eDiscovery phase of cases. He has experience working on hundreds of matters and has been recognized for building workflows and solutions to generate positive results. Frank has also been instrumental in assisting clients with their Information Governance and Data Management needs to maximize efficiencies.

CONTACT INFORMATION

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AREAS OF EXPERTISE

- Contracts Management
- Data Privacy
- Forensics
- Hosted Solutions
- ESI Workflow Design
- Managed Review
- Technology-Assisted Review

EDUCATION/QUALIFICATIONS

- English Literature, Wabash College

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