

ILTA AWARDS OF EXCELLENCE



APRIL 2024 / LE MÉRIDIEN CHARLOTTE



STONE
CONSULTING TEAM

DOCUMENT MANAGEMENT SYSTEM EXPERTS

Stone Consulting Team is a woman-owned boutique company of consultants who provide white glove tech services to clients in the legal and corporate legal industries.

The team's expert technicians draw on a wealth of experience to address the needs of each client, and follow each project from inception to planning, installation and maintenance. After years of building successful professional services divisions for other consultancies, our team members' unique backgrounds and expertise steer law firms from complexity to success in new and productive ways.



iMANAGE 2023 PARTNER AWARD

PARTNER OF THE YEAR – MMR
NORTH AMERICA PARTNER

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CONTENTS



- 4** Influential Women in Legal Tech
- 16** Best Article of the Year
- 22** Best Blog of the Year
- 26** Young Professionals to Watch
- 38** Innovative Leader of the Year
- 48** Solution Provider of the Year
- 54** Trailblazer of the Year
- 60** Transformative Project of the Year
- 66** Lifetime Achievement Award

ILTA'S AWARDS OF EXCELLENCE

This awards program recognizes ILTA Member and Partner contributions, celebrating the diversity of and to laude the efforts ILTAns put forth creating content, influencing, mentoring, and adapting to ever-changing legal technology. This annual publication highlights the award recipients for the year.

awards.iltanet.org

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INFLUENTIAL WOMEN IN LEGAL TECH

ILTA Influential Woman in Legal Tech illustrates that the individual is a dedicated professional in fostering change and female leadership (i.e. developing mentorship or leadership programs, making noteworthy contributions to the legal technology space, and/or championing innovative initiatives).

ALMA ASAY

Chief Innovation and Value Officer
Crowell & Moring LLP



AALIA MANIE

Head: Webber Wentzel Fusion
Webber Wentzel



TERRI MOTTERSHEAD

Executive Director
Centre for Legal Innovation at the College of Law



CARYN SANDLER

Partner + Chief Knowledge and Innovation Officer
Gilbert + Tobin



GINEVRA SAYLOR

National Director, Innovation and Knowledge
Gowling WLG (Canada) LLP



Alma Asay

Chief Innovation and Value Officer
Crowell & Moring LLP

Alma Asay, Crowell & Moring LLP's Chief Innovation and Value Officer, is a distinguished leader in legal innovation, prioritizing real-world adoption and bridging gaps for impactful change. She oversees initiatives spanning client value, data analytics, knowledge management, and generative AI (Gen AI), backed by her experience in legal technology and recognition from prestigious organizations like the American Bar Association (ABA).

Alma became a part of the early legal innovation boom when she entered legal technology spaces in 2012. At the time, there was very little support for startups. She accepted roles with Integreon and Litera to deepen her skills as a lawyer and legal tech startup founder. Ultimately, Alma wanted to bring her knowledge and experience back to a big law firm, where she could work with lawyers to improve their use of legal technology.

Alma brings her firsthand experience of building technology and relationships in the legal tech world to her role as Crowell & Moring's Chief Innovation Officer. This experience gives Alma a unique perspective on understanding the interconnected working relationship between attorneys, legal technology solution providers, and other industry partners. She



LINKEDIN /almaasay

has a vast understanding of how different law firms approach legal technology.

At Crowell, Alma’s contributions include standing up the firm’s first data warehouse, building out the firm’s first subscription legal technology offering, working closely with legal tech providers to improve adoption and the value of legal technologies, implementing a monthly series of "Innovation Insights" presentations, serving as a resource for client legal ops teams to use legal technology to achieve their objectives, and leading the firm’s approach to how we incorporate generative AI (Gen AI) into legal practice in responsible ways. Alma strives to vocalize successes and failures so others can learn from her experiences. She continues to see the impact of this practice as she fosters connections with others throughout the industry.

Mentorship has always been tremendously important to Alma. She did not enter the legal sector with connections or a clear destination. However, she was fortunate to have a mentor and others along the way who recognized her potential and shared their wisdom, cache, and connections. As one of the first female founders in the current wave of legal innovation, Alma provides mentorship and insight to other female founders and does not take their trust in her lightly. She joined ILTA’s

myMentor program in 2023, hopeful of finding a structured and more formal way to support others within the industry.

Alma has always admired Monica Bay and how her work elevated women across the legal tech sector. Following in her footsteps, Alma took on responsibility for the "Women of Legal Tech" series for Legaltech News. She’s honored by the opportunities to connect with and elevate the profiles of women in legal tech. Alma is passionate about providing resources and mentorship that make a difference in women’s professional journeys in legal tech.

ALMA ASAY

Awards & Certifications

- AI Visionary Award, Relativity (2024)
- Legal Rebel Award, American Bar Association (2017)
- Fastcase 50 (2016)
- LTRC Women of Legal Tech (2016)

WOMEN WHO LEAD
Podcast

Interview with
ALMA ASAY

Listen to the Women Who Lead Podcast interview with the 2024 Influential Women In LegalTech and learn more at ilitanet.org/wwl

Aalia Manie

Head: Webber Wentzel Fusion
Webber Wentzel

Aalia Manie is the Head of Webber Wentzel Fusion at Webber Wentzel. Aalia is a lawyer, legal technologist, and entrepreneur focusing on driving impactful legal technology solutions. With a background in IP and technology law, she spearheaded regulatory reforms. She later gained operational experience in a technology startup before returning to innovate and deliver advanced legal solutions for the firm and its clients.

As the Head of Fusion at Webber Wentzel, Aalia performs client-facing advisory work and designs and implements the AI and legal technology strategy for one of South Africa's leading law firms. She contributes to South Africa's legal community through ecosystem enablement, community support, and personal mentoring/coaching of talented and previously disadvantaged individuals. Aalia makes a meaningful and tangible difference in her community by considering the unique challenges and opportunities faced by South Africa and its people.

She serves as a founding advisory board member of the South African AI Association, advocating for the responsible use of AI-powered legal technology. Historically, the legal technology landscape in South Africa lagged behind global standards. This delay is



LINKEDIN /aaliam

partially due to the market size, lack of skills, and structural and regulatory obstacles that make it significantly more challenging for South African tech companies to get funding, use their IP, survive, or grow. Removing these barriers and supporting the technology startup community benefits many, especially legal tech companies.

Aalia believes that leadership at work and in the community requires practicing servant leadership. She focuses on actively listening to the needs and aspirations of those in her professional environment, providing resources and support in response, and providing encouragement and mentorship to support others in achieving their goals. Aalia goes beyond technical training with her team to engage in regular feedback, soft skills development, and personal care. She empowers team members to lead from any position, challenge their comfort zones, find innovative solutions, and cultivate a culture of care.

Aalia brings new meaning to leadership. Her leadership skills and abilities allow her to see and inspire the best out of each person she engages with and serve as an outstanding mentor. Aalia is an active mentor for the Gallagher Foundation, which offers scholarships to disadvantaged communities. She was recognized for her service on the Community Council of Silicon Cape, the leading startup community accelerator

in South Africa. Aalia began the first legal incubator for tech startups in Africa, Webber Wentzel Ignite. This program provided legal services to support the business development of selected applicants and prepared their teams for future funding and expansion.

AALIA MANIE

Awards & Certifications

- Wharton School (University of Pennsylvania) AI & Law
- Lund University Mail & Guardian
- Top 200 Young South Africans, African Legal Awards
- Attorney of the Year Finalist, African Legal Awards
- Lead Attorney for IP Team of the Year Award, Chambers Global
- Notable Practitioner, Fintech

WOMEN WHO LEAD
Podcast

Interview with
AALIA MANIE

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iitanet.org/wwl

Terri Mottershead

Executive Director

Centre for Legal Innovation at the College of Law

Terri Mottershead is the Executive Director of the Centre for Legal Innovation at the College of Law in Brisbane. She collaborates internationally to transform legal businesses, enhance client services, and foster diverse talent retention, overseeing global initiatives. Terri was appointed Chair of the Queensland Law Society's Generative AI in Legal Practice Joint Working Group, following a career spanning law practice, startup founding, and talent management in Asia and the U.S.

At the Centre for Legal Innovation, Terri and her team create a safe, energetic, collaborative space where people gather to learn, share experiences, and experiment with what is transforming the legal ecosystem. The Centre was established in May 2016 with an educational foundation to identify, analyze, and monitor the increasingly rapid changes in the legal sector and translate collected educational material into bite-sized action steps for legal professionals. The Centre is now connected with over 126,000 people in 116 countries.

The Centre for Legal Innovation (CLI) has three main areas of focus: (1) emerging legal practice, (2) innovation and "Legalpreneurship," and (3) legal technology and AI. Their core values reflect CLI's



LINKEDIN /terri-mottershead

dedication to building communities and connecting with people with common desires and values. Fully funded by the College of Law, CLI and Terri work with faculty committed to educating and transforming the legal ecosystem.

CLI's work is to raise awareness about what is transforming law, the tools that enable it (tech/AI), the people you need to get it done (capabilities), and best practices from industry leaders. In February 2023, CLI launched its Legal Generative AI Initiative. The kick-off event in March hosted 17 roundtables with lawyers (private, corporate, and government), allied legal professionals, legal educators (academics, pracademics, and clinicians), law students, access to justice professionals, and regulators from across the Australian legal ecosystem. The initiative grew into CLI's AI for Legal Series, with a Legal Generative AI Summit in October, the Legal Generative AI Summit 2023 Report, a CLI Distinguished Fellowship in Emerging Technologies, a Legal Gen AI Clinic, and a global community on LinkedIn. The initiative will continue to expand in 2024.

Terri was recognized in the IWD Women Lawyers Association of Queensland 2022 Inspo List for her unwavering support and encouragement of women in law. She is Chair of the Queensland Law Society Innovation Committee and was recently appointed Chair of their new Generative AI in Legal

Practice Joint Working Group. She facilitates sessions for law firms, allied legal professional associations, tech developers, and consultants. Terri also contributes to podcasts, interviews, and practice transformation research.

TERRI MOTTERSHEAD
Awards & Certifications

**Chair, Queensland Law Society
 Generative AI in Legal Practice Joint
 Working Group (2024)**

**Global Female Founder Finalist,
 Australian Legal Technology
 Association (ALTA) Awards (2022)**

**Member, CLOC Global Education
 Advisory Council (2021)**

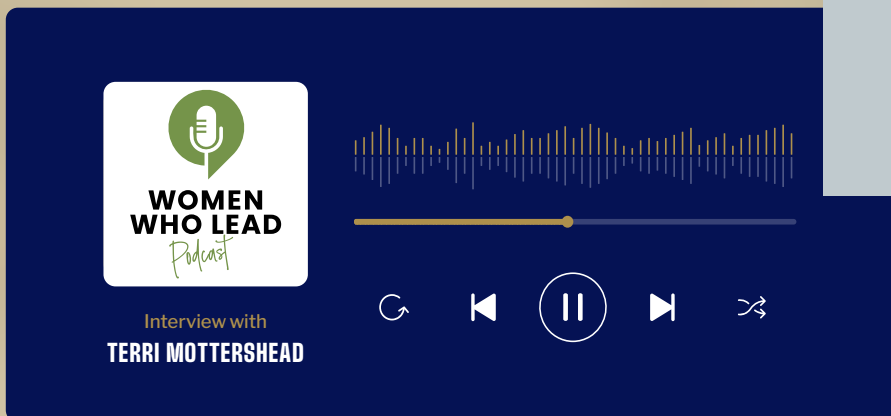
**Chair, Queensland Law Society
 Innovation Committee (2021)**

**Innovator of the Year Award Finalist,
 Lawyers Weekly Women in Law
 (2021)**

**Australian representative on the
 Asia-Pacific Legal Innovation &
 Technology Association (ALITA)
 Advisory Board (2019)**

**Fellow, College of Law Practice
 Management (2018)**

**Oceania Ambassador, World Legal
 Summit (2018)**



Listen to the Women Who Lead Podcast interview with the 2024 Influential Women In LegalTech and learn more at

ilitanet.org/wwl

Caryn Sandler

Partner + Chief Knowledge and Innovation Officer
Gilbert + Tobin

Caryn Sandler is a Partner and Chief Knowledge and Innovation Officer at Gilbert + Tobin. Caryn oversees specialized services to enhance legal service delivery and develop new tools for the firm and its clients. Her extensive recognition in innovation and her leadership roles in various organizations reflect her commitment to advancing legal education.

A pioneer of innovation in the legal process, technology, and capability, Caryn transformed Gilbert + Tobin's (G+T) service delivery and functions as a catalyst for change across the legal tech industry. She is part of the Legal Service Innovation (LSI) team and G+T Innovate, positioning both as essential to high-value legal services. Under her leadership, embedding technology has become business as usual at G+T. Through G+T Innovate, Caryn is essential in supporting in-house legal teams, developing technology roadmaps, navigating the complex and overlapping legal technology ecosystem, implementing legal technologies, and creating pathways for changes needed to support these efforts.

G+T has actively used AI platforms since 2010 in eDiscovery and due diligence. Caryn aids the firm with AI and Gen AI tools, like OpenAI/ChatGPT. Under her leadership, G+T formed an AI task force, steering



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committee, and partner leadership team to tackle the firm's AI transformation.

In March 2023, Caryn and the G+T Innovate team hosted Innovate23, an in-person full-day conference for in-house clients to support them on their transformation and technology journeys. Innovate23 was an industry-first legal operations conference presented by a law firm for in-house legal clients. The meeting focused on transforming in-house legal operations, displaying global developments through case studies, and providing practical technology selection and implementation strategies.

Caryn shifts a standard narrative in the legal industry around reserving professional development and talent training resources for practicing lawyers. She heavily invests in career development and leadership opportunities for her LSI team, including developing a team capability framework. She pioneered an industry-first LSI clerk and graduate rotation to encourage growth and bolster talent within the sector.

Caryn presented at over 30 webinars/sessions for LegalTech conferences, Australian Corporate Counsel, College of Law, Centre of Legal Innovation, and various universities in 2023. She delivered a new and dedicated module on innovation and legal technology for the Law Society of NSW's Practice Management Course. In May 2024, Caryn began her second

term as co-chair of the Advisory Board for the Centre of Legal Innovation.

Caryn was heavily involved with supporting the Women in Australian Legal Technology Association and spoke at their events. She endeavors to lead with ambition, embracing change and sharing her acquired knowledge with the industry as one of Australia's most prominent thought leaders in legal technology.

CARYN SANDLER

Awards & Certifications

**Most Innovative Change Maker,
Financial Times Innovative Lawyers
Asia-Pacific Awards (2022)**

**Innovator of the Year, Australian
Law Awards (2022)**

**Innovator of the Year, Partner of Law
Awards (2021)**

**Innovator of the Year, Women in Law
Awards (2019, 2020)**

WOMEN WHO LEAD
Podcast

Interview with
CARYN SANDLER

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ilitanet.org/wwl

Ginevra Saylor

National Director, Innovation and Knowledge
Gowling WLG (Canada) LLP

Ginevra Saylor is the National Director of Innovation and Knowledge at Gowling WLG (Canada) LLP. Ginevra leads strategic initiatives in knowledge management and client solutions, drawing from over twenty years of experience spanning various leadership roles in legal technology, process improvement, and litigation. She champions innovation and knowledge sharing in the legal profession through her speaking engagements, publications, and project successes.

Ginevra is a seasoned trailblazer in legal knowledge management, innovation, and legal technology implementation, design, and adoption. Her work within the legal profession began over 30 years ago. She started as a practicing lawyer for ten years, shifted to legal tech after ten years, then transitioned to a KM and innovation specialist in 1998. Since then, Ginevra has developed change management strategies, legal tech adoption models and educational content, innovation protocols, and suites of proprietary tools. She co-founded the Canada Legal KM/Tech forum that grew from 12 member firms in Toronto to roughly 50 across Canada.

Ginevra led the identification, investigation, design, implementation, training, and adoption strategies



LINKEDIN /ginevrasaylor

for countless legal technologies in one national and two global law firms. These technologies range from DMSes, extranets, intranets, and automation to AI, Gen AI, and more. She is particularly proud of her propensity to seek out and work with new legal tech start-ups, collaborate closely with them to develop their products for the market and influence their strategic direction. Seeing these emerging entrepreneurs learn, grow, and prosper has been gratifying. She continues to work with and develop partnerships with legal tech start-ups and offers advice and mentorship to others exploring legal tech ideas.

Ginevra's contributions to the legal tech ecosystem are evident in the prolific collection of educational material she's authored throughout her career. She has written articles, white papers, chapters, and books on law, legal technology, innovation, law practice management, and knowledge management. She is a frequent international speaker on these topics, including at international events in Dublin, Mumbai, the U.S., and Canada. She has graciously spoken at ILTACON sessions yearly for roughly ten years or more. She participates in webinars and podcasts for Bar Associations, ILTA, legal technology vendors, and other industry associations and networks.

Throughout her career, Ginevra has mentored many students, lawyers, tech entrepreneurs, volunteers, and recent immigrants looking to enter the legal or legal tech industry. Her mentorship has played a vital part in formal programs, like Toronto's Recent Immigrants Employment Council and Law Within High Schools, as well as informal individual mentorship. Every year, Ginevra mentors several young lawyers in legal writing, process improvement, technology adoption and practice, and matter management.

GINEVRA SAYLOR

Awards & Certifications

- Innovation Award, Precedent Magazine (2021)**
- Mental Health First Aid Standard (2021)**
- Working Minds Manager Program (2021)**
- Shining Star Award, ILTA Publications (2016)**
- Knowledge Management Leadership Award, Global KM Congress and Awards (2016)**
- Yellow Belt, Legal Lean Sigma and Project Management (2015)**
- Member of the Ontario Bar (1998)**
- Arbitration II (1998)**
- Member of the PA Bar (1984)**

WOMEN WHO LEAD Podcast

Interview with **GINEVRA SAYLOR**

Listen to the Women Who Lead Podcast interview with the 2024 Influential Women In LegalTech and learn more at ilitanet.org/wwl



**BEST ARTICLE
OF THE YEAR**

MEMBER

Nominees

CASEY RAUSCHENBERG

Experience Manager
Frost Brown Todd LLP



CINDY BARE

Chief Data & Innovation Officer
Frost Brown Todd LLP

STEPHANIE MILLS

Manager, Discovery Services
Cassels Brock & Blackwell LLP



PRITI SARASWAT

Legal Tech Consulting Manager
Baker & Hostetler LLP

BUSINESS PARTNER

Nominees

JAMIE BUCKLEY

Executive Vice President & Chief
Product Officer
LexisNexis



JEFF REIHL

Executive VP and CTO
LexisNexis

BILL BICE

CEO
nQ Zebraworks



ABHIJAT SARASWAT

Chief Revenue Officer
Lupl

NOMINEES

CASEY RAUSCHENBERG AND CINDY BARE

"FBT Amazing Race: Amazing results in just one week!" was published in September 2023, as many firms were beginning to launch Foundation or seeking better adoption for data collection.

READ ONLINE

epubs.iltanet.org/i/1508128/4

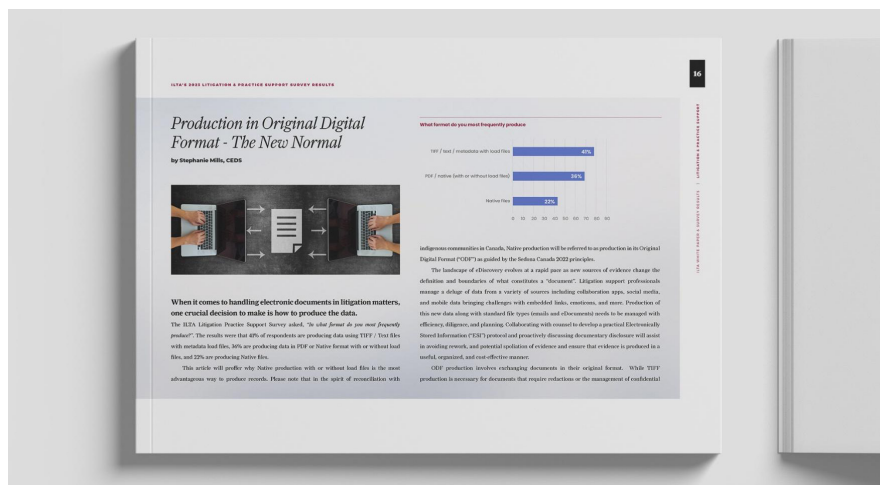


STEPHANIE MILLS

"Production in Original Data Format - The New Normal," was featured in ILTA's 2023 Litigation & Practice Support Survey Results publication. Stephanie provides relevant, timely, and thought-provoking insight into data production for litigation support professionals.

READ ONLINE

epubs.iltanet.org/i/1514711/15





PRITI SARASWAT

Navigating the Data Deluge:
Privacy, AI Governance, and the
Future of Innovation

READ ONLINE

epubs.iltanet.org/i/1508143/39

ARTICLE OF THE YEAR: MEMBER

Priti Saraswat received the Member Article of the Year Award for her article, “Navigating the Data Deluge: Privacy, AI Governance, and the Future of Innovation,” which appeared in the 2023 Fall issue of *Peer to Peer*. Priti addresses critical concerns arising for many legal technologists as the industry navigates one of the most pivotal moments in its history. As a collective of front-line pioneers in what many call the fourth industrial revolution, marked by advancements in AI and big data analytics, the need for legal technologists to engage in robust discussions around ethics, privacy rights, and governance models is paramount. Priti urges readers to adapt to changes in ways that uphold fairness, transparency, and accountability without hampering innovation.

Emerging research across legal tech-focused publications makes it clear that data privacy and innovation are central

issues for lawyers, firm leaders, and corporate counsels. In Priti’s position as a legal technologist in an AmLaw 100 firm with previous vendor experience, she directs her technical skills and strategic thinking toward enhancing data protection frameworks within organizations and assisting clients in strengthening their operational privacy.

Priti advocates for robust privacy practices, educating peers about emerging threats and innovative safeguarding strategies, and fosters dialogue that encourages proactive adoption of best practices across the industry. She consistently embodies ILTA’s core values through her contributions to the legal technology industry. She is committed to fostering a trusted resource community, providing relevant and timely information, nurturing skills and talents for professional development, and advocating for diversity, equity, and inclusion (DEI) as the Co-Chair of ILTA’s DEI Committee.

NOMINEES

**JAMIE BUCKLEY
AND JEFF REIHL**

"Rise of Secure, Global, Interconnected Generative AI Solutions," appeared in ILTA's 2023 Winter issue of *Peer to Peer* Magazine. The article addresses ways that Gen AI solutions empower attorneys and clients to achieve their business and legal objectives.

READ ONLINE

epubs.iltanet.org/i/1515316/59



BILL BICE

"Making the Jump to the Cloud," appeared in the 2023 Summer issue of *Peer to Peer* Magazine. In his article, Bill draws upon his experience building both on-premises and SaaS applications for the legal industry to emphasize that integrating a firm's applications is crucial for maximizing technology investment.

READ ONLINE

epubs.iltanet.org/i/1502513/55





2024
WINNER



MEMBER RESOURCES

Reimagining Software Adoption in an AI-Enabled World

by Abhijat Saraswat



72 PEER TO PEER: ILTA'S QUARTERLY MAGAZINE | FALL 2023

Little over 10,000 days ago, Bill Gates, while leading Microsoft, wrote a memo to his leadership team titled "The Internet Tidal Wave." In it, he forecasted the 20-year trajectory for Microsoft and the broader technological landscapes.

"In the next 20 years the improvement in computer power will be outpaced by the exponential improvements in communications networks. The combination of these elements will have a fundamental impact on work, learning and play. Great software products will be crucial to delivering the benefits of these advances. Both the variety and volume of the software will increase."

Decades later, we witness Gates' vision being prescient as technology has profoundly reshaped our daily spheres. As we stand at another pivotal juncture, we must ponder: Is Generative AI poised to be the next transformative wave in how we approach our work?

According to a study titled "Building the AI-Powered Organization," AI is projected to contribute \$16 trillion to the global economy over the next decade. However, only 8% of businesses engage in core practices supporting widespread AI adoption, indicating a vast opportunity for leveraging large language models (LLMs).

AI solutions have the potential to bolster human creativity. In "Reimagining Creativity and AI to Boost Enterprise Adoption," the author argues that AI is not yet a stand-alone creator. Still, it assists humans in data creation, analysis, and creative processes. Large Language Models (LLMs) can enhance human creativity and productivity.

Moreover, technology may greatly impact decision-making and productivity within organizations. To achieve this, importance must be placed on having a data-friendly ecosystem with unified standards and

cross-platform sharing. This could lead to LLMs performing real-time analysis and extracting meaningful insights from complex issues.

Leveraging large language models (LLMs) revolutionize the future of work. Their power lies in what they can do and how they can change our relationship with data apps. We are rapidly moving towards a world where we can question data and get fast, accurate responses.

Technology has evolved

Software development's evolutionary trajectory is a testament to our unwavering commitment to progress and adaptability. A few decades past, creating a software prototype required meticulous efforts, necessitating stable teams and drawn-out timelines. Reflect upon the early days of Mozilla, the architect behind Firefox. These milestones of open-source browser technology laid the foundation for the future, even without the sophisticated tools and APIs we have today.

From Mozilla's inception to its present stature, this journey highlights the breathtaking speed of technological progress and our escalating dependency on it. This path mirrors the vision of Bill Gates, emphasizing the fluidity and evolving nature of the technological world.

The integration of APIs and advanced tech frameworks enhances today's landscape. Tasks that demanded years of dedication can now be realized in handfuls of days. Such expedited advancements, powered by vast implications for sectors steeped in tradition, till

"Tas dem of de now in ju"

ABHIJAT SARASWAT

Reimagining Software Adoption in an AI-Enabled World

READ ONLINE

epubs.iltanet.org/i/1508143/71

ARTICLE OF THE YEAR: BUSINESS PARTNER

Abhijat Saraswat's article, "Reimagining Software Adoption in an AI-Enabled World," appeared in the 2023 Fall issue of *Peer to Peer*. Weaving together theoretical insights with practical applications, particularly focusing on large language models (LLMs) and their capacity to amplify human creativity and efficiency, Abhijat invites legal professionals to reimagine their relationship with technology. With Gen AI-powered solutions promising to redefine how we interact with software and technology in our daily routines, he aims to illuminate the path from apprehension toward adoption, underscoring that embracing these advancements is essential for staying at the forefront of legal practice.

As Chief Revenue Officer for Lupl, Abhijat intentionally nurtures ecosystems where ideas can flourish and inspires others

toward meaningful change. His contributions bridge gaps between technological capability and practical application, as well as innovators who envision future possibilities and everyday practitioners seeking efficient solutions. Abhijat advances this mission with an unwavering focus on enhancing how legal professionals interact with technology.

Abhijat's commitment to high standards of ethics and professionalism drives his contributions to collective progress, respect for diverse viewpoints, and dedication to cultivating environments where constructive dialogue flourishes. He strives to incorporate DEI principles into every facet of spaces he creates so that everyone feels valued and included. Abhijat is an active volunteer who recently accepted an opportunity to serve as a Publication Liaison for ILTA's Programming Committee.



BEST BLOG OF THE YEAR

2024 Nominees

DANIEL CREANEY

Technical Manager, Systems
Administration
Kobre & Kim LLP



JEFF COX

Director of Global Content Marketing
vLex

ANDREW CORRIDORE

Associate Director of Information
Governance
Foley Hoag LLP



ELIZABETH ADKINS

Director, Information Governance
Davis Wright Tremaine, LLP

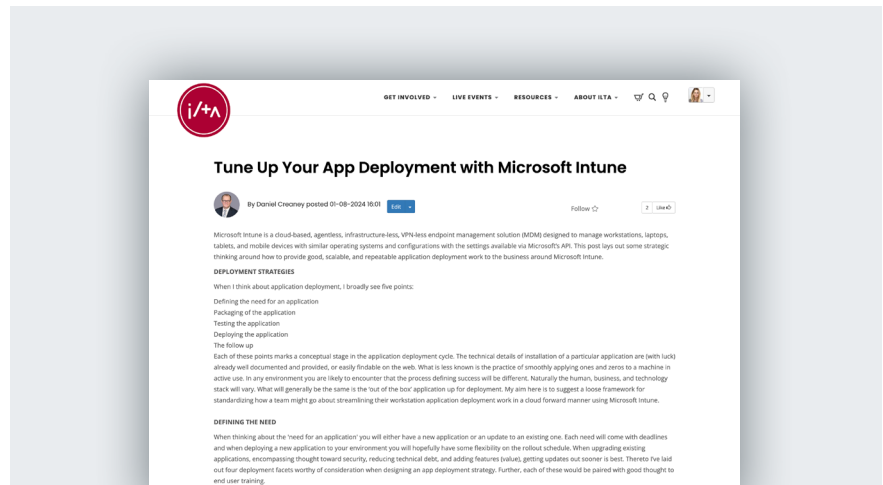
NOMINEES

DANIEL CREANEY

"Tune Up Your App Deployment with Microsoft Intune," for individuals within ILTA's larger community who specialize in IT Operations.

READ ONLINE

<https://www.iltanet.org/blogs/daniel-creaney1/2024/01/08/tune-up-your-app-deployment-with-microsoft-intune>

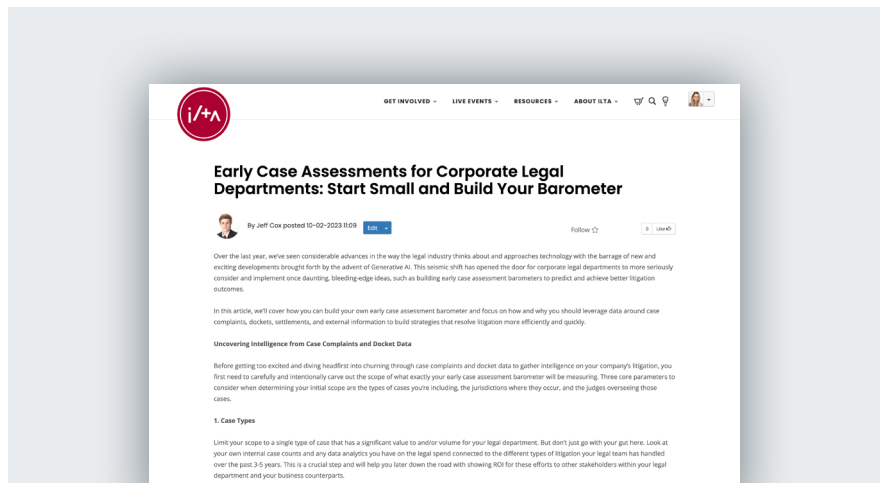


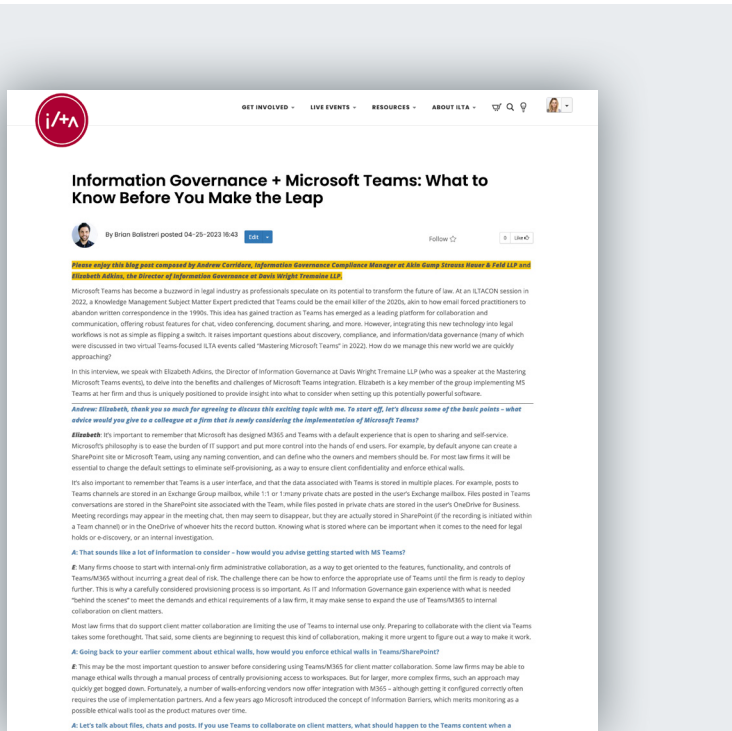
JEFF COX

"Early Case Assessments for Corporate Legal Departments: Start Small and Build Your Barometer," offers a pragmatic approach for in-house counsel and legal ops teams to look at ways to leverage internal and external data sources to resolve litigation more efficiently.

READ ONLINE

<https://www.iltanet.org/blogs/jeff-cox/2023/10/02/early-case-assessments-for-corporate-legal-departm>





**ANDREW CORRIDORE
AND ELIZABETH ADKINS**

Information Governance + Microsoft Teams: What to Know Before You Make the Leap

READ ONLINE

<https://www.iltanet.org/blogs/brian-balistreri/2023/04/25/information-governance-microsoft-teams-what-to-kno>

BLOG OF THE YEAR

Andrew Corridore, the Information Governance Compliance Manager at Akin Gump Strauss Hauer & Feld LLP (now with Foley Hoag LLP), posed questions to Elizabeth Adkins, the Director of Information Governance at Davis Wright Tremaine LLP, in their collaborative blog, "Information Governance + Microsoft Teams: What to Know Before You Make the Leap." There is a great deal to know about how Teams works "behind the scenes" and what factors to consider before deploying it widely. Andrew and Elizabeth cover important points about Teams' impact on discovery, compliance, and information/data governance.

As a vital member of the group implementing MS Teams at Davis Wright Tremaine, Elizabeth is uniquely positioned to provide insight on considerations essential to setting up this potentially powerful software. Andrew and Elizabeth note the legal sector's increasing transition towards Microsoft Teams. They speak directly to law firms' information governance and

IT personnel and cover topics like what questions they should ask, who needs to be included in various conversations, and how to maintain compliance with legal/client obligations.

Andrew is passionate about creating spaces where IG/IT individuals can find guidance about tricky issues. He believes open knowledge-sharing is exceptionally important to today's legal tech community. He advocates that legal technologists should strive to ensure all implement quality information governance practices.

Elizabeth embraces ILTA as a precious resource for individuals oriented to specific governance issues unique to law firms. She participates in ILTA IG Roundtables and regularly contributes to those discussions. She is an active attendee of ILTA's Teams MasterMinds and contributes to the Law Firm Information Governance Symposium (LFIGS), which publishes white papers every year.

YOUNG PROFESSIONALS TO WATCH

The Young Professionals to Watch Award recognizes rising young professionals (under 40) in the legal technology industry, including members, partners, and academics. The application questions are intended to demonstrate the candidate's achievements, professionalism, and leadership in the legal technology space. Moreover, it recognizes how the individual extended their skills to the legal community and reflected ILTA's core values.

KURT BYRNE

Business Analyst
Howard Kennedy



STEPHANIE GOUTOS

Practice Innovation Attorney
Gunderson Dettmer



BLAIR COHEN

Director of Client Solutions
Legalpeople



KRISTIN KELLY

Growth Marketing Programs Specialist
eSentire



JEFF COX

Director of Global Content Marketing
vLex



ALLISON KENNEDY

Senior IS Project Manager
Cooley, LLP



LAUREN DOUCETTE

Senior Project Manager
Sheppard Mullin Richter & Hampton



ALI OFSTAD

Lead Product Manager
NetDocuments



ANUSIA GILLESPIE

Chief Strategy Officer
SkillBurst Interactive



MADELEINE USHER

Project Manager
Davis Wright Tremaine LLP





Kurt Byrne

[LinkedIn / kurt-byrne-598b12a7](#)



As a business analyst at Howard Kennedy, Kurt analyzes business processes, identifies areas for improvement, and implements solutions to increase efficiency and productivity. He defines professionalism as the continuous practice of learning and developing new skills to improve personal proficiency and contributions to the firm.

Kurt uses integrative technologies to connect siloed systems and ensure that common data is understood across various platforms. His focus is identifying ways to support lawyers as they leverage information to provide more efficient and effective work for their clients.

Kurt is committed to the highest standards of ethics and professionalism. As a business analyst, he works with Howard Kennedy's risk and IT security teams to ensure that sensitive information is secured when onboarding

new tools and processes for the firm. He conducts risk assessments and procurement documents to support the onboarding of changes.

Kurt regularly volunteers to host and attend SIG meetings for ILTA, particularly those focused on business analysis and project management. He encourages junior members to attend and participate in SIG meetings and ILTA networking events. Kurt attended ILTACON for the first time in 2023 and plans to continue his attendance over the coming years.



Blair Cohen

[LinkedIn](#) / [blair-cohen-3b4736117](#)

As Relativity's Program Manager for Brand Content, Blair Cohen manages programs that support Relativity's brand and key corporate initiatives. Blair's understanding of professionalism stems from a unique fusion of her experience as an improv comedian and former social worker. Her social work background enhances her ability to discern how to best engage with coworkers and members of her communities daily.

Blair is passionate about highlighting the voices of others, particularly diverse voices within legal tech communities. She is the driving force behind Stellar Women, Relativity's podcast and community of listeners that began in 2018. Here, Blair spotlights women in legal technology, promotes gender equity, and provides learning and development opportunities to women within the tech and legal tech industries.

Blair's skills in performance and comedy empower her to deliver relevant content, help coach the next generation of speakers, and encourage those who suffer from speaking anxiety. She is an avid volunteer who collaborates with AI Visionaries through blog articles, creating podcast episodes, slotting them into different speaking engagements, and helping them create a year-long plan of engagement. Blair hosted and participated in various sessions at Relativity Fest in 2018, 2020, 2021, 2022 and 2023. She attended ILTACON with Relativity in 2022 and 2023.



Jeff Cox

[LinkedIn / jeffcoxesq](#)



As an innovative lawyer, content strategist, and legal technologist, Jeff Cox specializes in helping legal technology companies and law firms elevate their corporate and professional narratives, spotlight thought leadership campaigns, and enhance digitally delivered content. Initiatives he designs support the creation of content that proactively educates key stakeholders about developments impacting their businesses. Jeff is passionate about sharing ways that legal professionals can enhance their social media presence as a way to enhance their engagement opportunities with digital communities and clients.

Professionalism, for Jeff, is a way of life. It is the ethos and attitude one brings to their work, as well as a commitment to maintaining quality and elevating others. Jeff exemplifies professionalism through his reliability, integrity, ethical conduct, accountability, competence, empathy, understanding of others, and continuous intentionality about professional improvement and growth.

Since attending his first ILTACON in 2020, Jeff looks forward to engaging with the community of collaborative, energized, and

innovative legal tech individuals who gather for the annual event. Each year at ILTACON, Jeff utilizes his social media presence to share live tweets and educational content on LinkedIn so others in his network who cannot attend can benefit from highlights of the exceptional educational content produced by ILTA's community members. Jeff's volunteerism with ILTA extends far beyond his yearly engagement with ILTACON. Following his 2023-2024 term as a member of ILTA's Corporate Content Coordinating Team, Jeff accepted a volunteer position to serve as one of the Publication Liaisons for ILTA's Programming Committee. Jeff is also active in his local legal community and is the Chairperson elect of the Board of Directors of Bay Area Legal Services, a nonprofit law firm providing free civil legal services to low-income Tampa Bay area residents and others across the State of Florida.

Jeff is currently the Director of Global Content Marketing for vLex, and previously served as Senior Manager of Content Strategy at Orrick.



Lauren Doucette

[LinkedIn / laurendoucette1](#)

As Sheppard Mullin's Senior eDiscovery Project Manager, Lauren Doucette manages the eDiscovery needs for the San Diego and Del Mar offices. She administers machine learning projects across all litigation practices and consults case teams on discovery issues like providing testimony in support of discovery motions, negotiating ESI protocols and search parameters, and advising on eDiscovery strategy.

Lauren practices professionalism by showing others respect, even when it is challenging, stressful, or time-consuming. She serves as a board or committee member for several legal professional organizations and volunteers for groups like San Diego ESI Forum, Women in eDiscovery, USD Paralegal Advisory Committee, and FEW - a San Diego network of influential women in legal who mentor other women beginning their careers. She is on the Steering Committee for the San Diego ESI Forum.

Lauren is heavily involved with the legal professional organization Women in eDiscovery, serving in many roles over the years, both locally and nationally. She started a

mentorship program in the San Diego area that matched newly graduated law school students, IT undergraduates, and paralegals with experienced eDiscovery mentors. Lauren facilitates conversations around career choices and planning, certifications and educational requirements, and soft skills needed for success in the legal tech sector.



Anusia Gillespie

[LinkedIn / anusiagillespie](#)



Anusia toured the legal ecosystem through academia at Harvard Law School Executive Education, law firm business as the first Head of Innovation at Eversheds Sutherland, and in-house service transformation at UnitedLex before joining SkillBurst Interactive as their Chief Strategy Officer.

At Eversheds Sutherland, Anusia spearheaded a successful “Spoliation Scientist” collaborative project with legal tech professionals specializing in knowledge management and pricing, the creative team for UI design, practicing litigators, and a third-party vendor. She continues to spearhead programmatic collaboration for legal technologists around professional development, general counsel, practicing lawyers, innovation executives, and more.

Anusia perceives professionalism as the willingness to work with respect, humility, and accountability to achieve shared

goals and engage in positive working relationships. She appreciates what others bring to the table, keeps an open mind, and defers to others’ expertise when necessary.

She volunteers as an organizer for LegalTech Boston. Anusia has donated time to the Women’s Bar Association and developed a pro bono fundraising event for the Lawyers Have Heart program to support the American Heart Association. In 2020, she participated in ILTA’s webinar, Women Who Lead - Herstory: Getting a Seat at the Table - Three Women Tell Their Inspirational Stories and won the Amicus Champions of Justice Award.



Stephanie Goutos

[LinkedIn / stephanie-goutos-7565a54a](#)

Stephanie Goutos is a Practice Innovation Attorney at Gunderson Dettmer, where she leads the strategic innovation and knowledge management initiatives for the firm's Employment and Labor practice. Stephanie has spearheaded several transformative technology projects to enhance firm operations, like the launch of Gunderson Dettmer's Gen AI app, ChatGD, chatbot creation, SMART requests, and automated documents and platforms.

Integrity, accountability, and respect are foundational to Stephanie's professional identity. Her commitment to these principles is evidenced through her efforts to defend the rights of individuals and organizations, ensuring that justice and fairness are upheld. Stephanie advocates for inclusivity and access to justice as integral components of professional conduct. She utilizes her position and skills to mentor others and break down barriers to participation.

Stephanie founded BOLD Women of Legal Tech, inspired by a transformative weekend spent with Caroline Criado Perez's "Invisible Women: Exposing Data Bias in a World Designed for Men." The group, now nearly 200 strong, focuses on mutual support and fostering inclusivity within legal tech. She collaborates with the RAILS (Responsible AI in Legal Systems) collective effort to ensure that AI is used ethically in legal contexts.

Stephanie, an ILTA volunteer, participates in myMentor mentorship program and attends ILTACON yearly. She contributes to podcasts and is active on message boards and ILTA's LinkedIn community. Stephanie actively shares knowledge and insights that help build a supportive legal tech community.



Kristin Kelly

[LinkedIn / kristin-kelly-3b1174133](#)



As eSentire's Growth Marketing Programs Specialist, Kristin Kelly develops and executes security-focused horizontal and vertical growth marketing campaign strategies that drive customer acquisition and expand top-line revenue. Kristin leads the budgeting, planning, and development of new integrated campaigns, which include virtual summits, third-party webinars, bespoke reports, and industry surveys.

Kristin displays exceptional professionalism in her teamwork, work ethic, reliability, and strong communication skills. Her definition of professionalism includes striving for excellence through strong work ethics and commitment to her career. She treats others with dignity and respect and takes an inclusive approach in daily interactions. Kristin believes in taking ownership of deliverables and remains open to new challenges and opportunities.

As an ILTA volunteer, Kristin helps with webinars, serves as an ILTACON Session Coordinator, and routinely engages with the larger community. She is also the Chair for "KidsAbility" through the Emerging Leaders Council in Canada.



Allison Kennedy

[LinkedIn](#) / [allisonkennedy1608](#)

Allison Kennedy is a Senior Information Services Project Manager at Cooley, LLP, focusing on strategic planning, project governance, and setting project criteria. Allison's expertise includes defining and implementing project management methodologies, standardizing and merging best practices and processes across departments, and managing resources through proactive scheduling and budget constraints. She develops and maintains project archives and the templates, tools, software, and other resources needed to refine project management processes.

Allison creates professional cultures where everyone feels valued and empowered to contribute. By setting a personal example, encouraging a spirit of cooperation, and driving projects to successful outcomes, she strives to achieve goals and enhance team members' and stakeholders' growth and

satisfaction. For Allison, professionalism means showing up daily with a positive and respectful demeanor, nurturing relationships, fostering collaboration, and creating spaces where trust and productivity flourish.

Allison has joined the larger ILTACON volunteer team for the past three years. As a Session Coordinator, she played a pivotal role in defining sessions, selecting speakers, and coordinating presentation content. She successfully organizes and motivates teams and enjoys opportunities to mentor new volunteers.



Ali Ofstad

[LinkedIn / ali-ofstad-a8848796](#)



Ali Ofstad is a Lead Product Manager for NetDocuments who brings life into the Next-Gen Experience and reshapes ways a DMS can support work done by legal professionals. Ali recently stepped into a coaching role where she mentors members of the re-structured and expanded product and engineering team on new skills, new products, onboarding, and process and product training. She attributes much of her success to recognizing that everyone has a different way of working. Ali devotes time to understanding the nuances of legal work and sharing those insights. Her constant curiosity inspires Ali to continue to improve and deliver tools that increase productivity and efficiency.

Ali builds strong relationships with customers and partners based on honesty and trust. For her, the core of professionalism is being a reliable team member and knowing when to take

action to establish trust and add value. Ali believes empowering people to be transparent, honest, and authentic is crucial. Everyone makes mistakes; they transform into wisdom when we take the time to understand why they happened, learn from them, and then move forward.

Ali is an ILTACON attendee, demo room session speaker, and webinar presenter. She participates in conversations with various ILTA communities and enjoys reading ILTA's whitepapers, surveys, and *Peer to Peer* magazine.



Madeleine Usher

[LinkedIn / madeleine-e-usher](#)

Madeleine Usher is a Project Manager in Davis Wright Tremaine's Enterprise Project Management Office. In this role, Madeleine defines and executes comprehensive project plans, conducts research, and assesses resource availability to create written recommendations, project charters, and change requests. She is adept at translating technical details into easy-to-understand communications and building bridges between technology solutions and their legal sector stakeholders.

Madeleine's ideal of professionalism is a fusion of competence, reliability, integrity, emotional intelligence, and respect. She understands that individuals who embody the highest levels of professionalism also have the emotional intelligence ability necessary to ensure that difficult conversations and conflicts are resolved with a level head.

Considering all perspectives, acknowledging biases and assumptions, and exercising empathy and genuine curiosity are Madeleine's strategic navigational tools for engaging in difficult conversations and resolving conflicts with a professional demeanor. She strives to ensure that colleagues can always rely on her for open and transparent communication and that she values their unique skills and perspectives.

As an ILTA member and a young professional, Madeleine relishes opportunities to forge connections with legal professionals through software implementation and process improvement. Community, collaboration, and a zeal for learning are crucial to her success.

INNOVATIVE LEADER OF THE YEAR

ILTA's Innovative Leader Award recognizes the outstanding achievements of a member or business partner in a leadership position who maximizes the value of innovative technology to support legal professionals. Nominees for this award are open-minded, motivated leaders who proactively plan and successfully implement innovative ideas.

MEMBER
Nominees



CINDY BARE
Chief Data & Innovation Officer
Frost Brown Todd LLP



RODNEY MULLINS
Senior Manager, Software Planning
and Development
McGuireWoods



AL HOUNSELL
Innovation Director
Norton Rose Fulbright

BUSINESS PARTNER
Nominees



JULIA MONTGOMERY
Director of Practice Enablement
King & Spalding



DAN HAUCK
Chief Product Officer
NetDocuments



TED THEODOROPOULOS
CEO
Infodash

Cindy Bare

Chief Data & Innovation Officer
Frost Brown Todd LLP



LINKEDIN / cindybare

Frost Brown Todd's first Chief Data and Innovation Officer, Cindy Bare, specializes in implementing, adopting, and maximizing Foundation firm intelligence technology and using law firm data to enhance client service and increase efficiency. Cindy grounds her innovative leadership in five strategic priorities: (1) Know Our Clients, (2) Focus on Industry, (3) Improve Efficiency, (4) Enhance Client Service, and (5) Grow the Firm.

Cindy led her team through the successful completion of over 130 projects, many including the implementation of new technologies, over the past two years. She guided research services and legal project management team members as they upgraded resources, provided LPM and technology training, rolled out new practice technologies, piloted and implemented generative AI tools, and upgraded the firm's intranet.

Cindy embodies ILTA's core values and exemplifies innovative leadership through her commitment to nurturing and mentoring new legal technologists, connecting with peers to exchange professional knowledge, and willingness to share successes and failures in personal meetings, presentations, and written content.

Cindy is a dedicated ILTA volunteer who brings almost twenty years of legal tech expertise to the community. She enjoys speaking engagements, hosting and organizing local and interest group meetings, and writing articles. ILTA has provided Cindy with opportunities for career development, a network of peers and mentors, inspiration, and ideas. She was delighted when three team members, including historically underrepresented groups in legal technology and first-time ILTACON presenters, were selected to present at ILTACON in 2023.

Rodney Mullins

Senior Manager, Software
Planning and Development
McGuireWoods

As the Senior Manager of Software Planning and Development at McGuireWoods, Rodney Mullins embraces and promotes a forward-thinking and proactive approach to legal information management. Rodney spearheads projects like automating governance processes, enhancing compliance standards, and automating research required to relate defendants named in alerts of new filings in federal courts to existing client relationships within the McGuireWoods database. He also led the firm's Records and Practice Support team through the successful implementation of the legal information governance software, FileTrail.

The innovative nature of Rodney's leadership is clear in his conceptualization and development of a sophisticated custom case management product capable of accommodating the dynamic demands of evolving case management duties. The product's dashboard provides instantaneous access to critical legal data, enabling attorneys and their clients to stay current on case statuses, key performance indicators (KPIs), and other relevant information in real time.

Rodney embodies ILTA's core values through understanding, respecting, and empowering employees' identities as an essential piece of diversity and inclusion. He is a highly respected and valued ILTA volunteer who served as the ILTACON 2023 Co-Chair alongside Scott David and partnered with Donna Frugoli as Co-Chairs for ILTACON 2024. While serving in this role, Rodney coordinated community forums,



LINKEDIN / mullinsrodneyk

encouraged volunteer engagement, and helped establish the Black Affinity Group within the DEI Committee. This group creates opportunities to continue networking and connect black professional technology members to increase their exposure and volunteerism within ILTA.

Rodney attests that his experiences with ILTA have been transformative, offering pathways for continuous learning, professional growth, and the chance to make meaningful contributions to the legal technology community.

Al Hounsell

Innovation Director
Norton Rose Fulbright

Al Hounsell stands at the forefront of leveraging innovative technology to optimize internal operations and expand client-facing services. As the Innovation Director at Norton Rose Fulbright (NRF), Al established the firm's multidisciplinary client solutions development team, including legal engineers, coders, lawyers, project managers, and advisors collaborating to build bespoke solutions for NRF's clients. Al's leadership model for successfully building and directing a diverse team of legal engineers, full-stack developers, and legal professionals at Norton Rose Fulbright is grounded in mutual respect and collaboration. By valuing each team member's contributions and fostering an inclusive working environment, he models respect for colleagues in every project and initiative the team undertakes.

The AI strategy implementation model Al designed for Norton Rose Fulbright underscores his commitment to ethics and professionalism. This model ensures that advanced technologies align with legal standards and ethical considerations, safeguarding clients' interests and maintaining the firm's integrity. The introduction and widespread use of AI-assisted tools for contract analysis and legal research dramatically streamlined NRF's due diligence processes and legal research



LINKEDIN / alhounsell

tasks, generating substantial time savings and reducing costs associated with these activities.

AI steadily demonstrates his dedication to developing and implementing forward-looking strategies that advance legal technology. His involvement in various AI-related committees, such as those with the Ontario Bar Association, and the development of a curriculum for legal tech and AI at Osgoode Hall Law School directly contribute to nurturing the skills and talents of legal professionals. AI regularly engages with legal tech professionals at conferences and events where he provides keynote presentations on AI and tech disruption. AI also uses his expertise to build tools to help pro bono clients understand their intellectual property rights.

AI finds his involvement with ILTA rewarding and both professionally and personally transformative. The experiences and relationships forged through ILTA events, speaking engagements, ILTACON planning sessions, and webinars serve as a cornerstone of AI's professional development journey in the legal technology sector. As an ILTA volunteer, AI significantly expanded his network by connecting with industry leaders and pioneers and found collaborative opportunities, mentorship, and friendships. Moreover, involvement with ILTA aligns with his belief in the power of collective intelligence and the importance of sharing knowledge to drive the legal profession forward.

"The experiences and insights gained through my ILTA volunteerism have been instrumental in shaping my approach to innovation and leadership in the legal tech space, underscoring the value of community, collaboration, and continuous improvement in driving the future of legal services."

AL HOUNSELL

Awards & Certifications

Best Use of Technology in a Law Firm (Canadian Law Awards, 2023)

Best Use of Technology in a Law Firm (Canadian Law Awards, 2022)

Innovation Leadership - Fastcase 50 Award (2021)

Excellence Award - Best Use of Technology in a Law Firm (Canadian Law Awards 2021)

Gold Award - Best Use of Technology in a Law Firm (Canadian Law Awards 2020)

Young Professional to Watch List (ILTA Distinguished Peer Awards, 2019 & 2020)

Julia Montgomery

Director of Practice Enablement
King & Spalding



LINKEDIN / juliarmontgomery

Julia Montgomery is an award-winning change management professional who solves business challenges through practical, data-driven strategies that build effective adoption of technology solutions. Julia combined wisdom collected through 15+ years of change management experience with neuroscience-based research about the impact of change on the brain to create a set of best practices and approaches designed to increase new technology adoption rates among attorneys.

Julia champions the value of change management and differentiating between technology usage and effective adoption. She guides clients through the change journey by combining eLearning content with practical advice and best practices.

ILTA sparked Julia's passion for the legal tech sector and helped expand her understanding of what being a "technology professional" meant beyond the traditional idea of a network engineer. Julia reflects that early in her career, ILTA was where she met women making a place for themselves in what had traditionally been a male-dominated profession. It was reassuring, inspiring, comforting, and encouraging. She now strives to share those experiences with other women in legal tech. Julia serves as a Co-Chair of ILTA's Women Who Lead Initiative and addressed the topic of effective change management for lawyers at the ILTACON 2023 G100 event.

Dan Hauck

Chief Product Officer
NetDocuments

The release of ndMAX was a significant milestone at NetDocuments driven by their Chief Product Officer, Dan Hauck. Dan and a talented team of product managers, marketers, engineers, and customer success managers noticed that many AI applications were “thin wrappers” around GPT4 that provided little added value. Dan and the NetDocuments team grew determined to create a differentiated, transparent application that empowers customers to control AI prompts directly, use Gen AI confidently, and deploy the technology responsibly. That goal inspired the concept of combining our no-code automation platform PatternBuilder with Gen AI models.

Dan and his team worked with Microsoft and existing NetDocument customers to create the solution now known as PatternBuilder MAX. PatternBuilder MAX quickly became the most popular product that NetDocuments has ever launched.

Using PatternBuilder MAX, Dan worked with the legal and sales operation teams to build a custom, AI-powered app to ingest a contract and extract a range of critical data points, including party name, contract value by product, execution date, storage



LINKEDIN / danhauck

allowance, and more. The app calculates future values like renewal date and price increases and identifies unique values like “first billing commencement date.” Dan worked with the partner team to develop a PatternBuilder MAX app capable of managing a new renewal process for NetDocument’s ISV partners. This app automatically calculates partnership level based upon various partner- and platform-related inputs, allows the partner to review and sign the contract, and then outputs the fully executed renewal.

As a trusted industry thought leader, Dan frequently volunteers time to engage with legal professionals. He is happy to discuss challenges with other legal tech entrepreneurs and offer experiential advice. Dan describes his experiences with ILTA’s community as rewarding with a lasting impact.

Ted Theodoropoulos

CEO
Infodash

As the founder of Infodash, Ted Theodoropoulos aims to change the game for law firms seeking ways to optimize the capabilities of tools within the Microsoft 365 environment. Infodash's API is deployed in a client's digital environment to facilitate information flow from back-end systems to all Microsoft 365 services, not just the Infodash user interface. When a firm deploys Infodash, power users can use back-end data from Aderant, 3E, iManage, NetDocuments, InterAction, etc., to create workflows in Microsoft's PowerAutomate or build low-code applications in PowerApps. They can also expose back-end data to Microsoft Teams for collaboration with internal stakeholders and externally with their clients.

Ted's unwavering commitment to innovative leadership has resulted in several clients winning awards for projects they implemented with the help of Infodash. Notable examples include Ogletree Deakins's intranet project, OD Connect, which won ILTA's Transformative Project of the Year in 2022. Fish and Richardson received the same award from ILTA in 2016 for their Shark Tank



LINKEDIN / tedtheo

project. Additionally, Hunoval Law Firm received a Process Excellence Award for its Six Sigma program implemented by Infodash.

On his podcast, Legal Innovation Spotlight, Ted interviews leading legal tech professionals about industry-specific advancements and best practices for incorporating new technologies into the legal sector. His podcast has been a tremendous success since launching during ILTACON 2023 and now reaches about 3500 listeners worldwide. Ted is a passionate ILTA volunteer who contributes thought leadership-driven content delivered through articles, whitepapers, webinars, and roadshows, as well as speaking in ILTACON and SharePoint Symposium sessions. Ted estimates that he has spoken at over 70 ILTA events. This experience has positioned him as a trusted IT and knowledge management resource. He serves on ILTA's Business Partner Committee and is energized through sharing the knowledge and experiences he has collected throughout his 15-year legal tech career.

"I am deeply honored to receive this prestigious award from ILTA," said Ted Theodoropoulos, CEO of Infodash. This recognition is a testament to the hard work and dedication of the entire Infodash team, as well as our unwavering commitment to driving innovation in the legal tech industry. We will continue to push the boundaries of what's possible and deliver cutting-edge solutions that empower legal professionals to work smarter and more efficiently."

PODCAST

Legal Innovation Spotlight

Legal Innovation Spotlight is a fireside chat series that shines a light on the latest trends and advancements in legal innovation. Each episode is hosted by Infodash and features a guest who is an expert in their field, sharing their insights and experiences with legal technology, innovation, and knowledge management. Legal Innovation Spotlight is the perfect podcast for professionals in Knowledge Management, Innovation, and Technology who are looking to stay informed and ahead of the curve.



getinfodash.com/podcast

The background features a large, faint, dark grey '2024' watermark. Two thin, glowing gold lines cross each other in an 'X' shape, one running from the top-left to the bottom-right and the other from the top-right to the bottom-left. The overall background is a dark blue with scattered white specks, resembling a starry night sky.

SOLUTION PROVIDER OF THE YEAR

ABOUT

The Award

The Solution Provider of the Year Award is intended to recognize an individual Business Partner or a Business Partner company for outstanding achievements and exceptional advancement of a software or technology solution.

2024

Nominees



INTELLEX
intellex.io



NETDOCUMENTS
netdocuments.com



THOMSON REUTERS
legal.thomsonreuters.com

Inteltek

LOGO

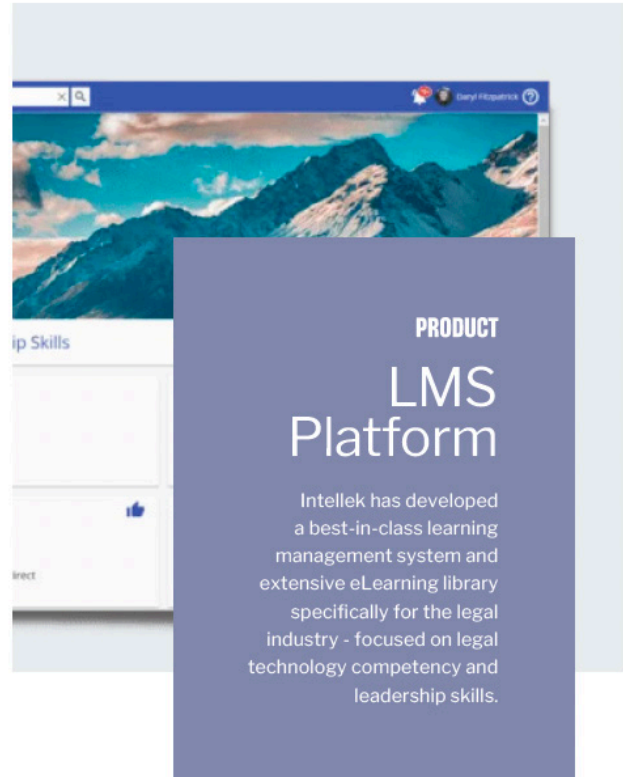


WEBSITE

inteltek.io

Inteltek is dedicated to pioneering new technology that delivers lasting value to legal professionals in an era of rapid change. Inteltek developed a best-in-class learning management system and extensive eLearning library specifically focused on legal technology competency and leadership skills. Their ground-breaking approach to corporate training delivery has earned industry awards, while 100% of clients say Inteltek's software positively influences their business.

Inteltek's blended learning solutions combine customized technology, microlearning, in-depth content, and formats optimized for law firm training. Their systems allow single sign-on, tracking compliance training, instructor-led events, social sharing, automated tasks, and in-workflow training to drive adoption and engagement. The National Society chose Inteltek's LMS platform and eLearning content for Legal Technology (NSLT) as the only solution to deliver their Legal Tech Certification program to more than 23,000 students. Moreover, their solutions currently have 52,400 active users at top law firms, including Mayer Brown, Ogletree Deakins, and Cravath, Swaine & Moore. They partner exclusively with leading legal tech vendors like Litera and WordRake by providing a white-labeled version of their solutions for training program needs, enabling a scalable training infrastructure for their employees and software users.



Inteltek delivers immense value by advancing legal talent, improving productivity, keeping professionals abreast of the latest software developments, and increasing training adoption by a reported 264%. Law firms using their solutions report greater competitiveness, winning new business based on expanded technical and client service capabilities. Inteltek enables organizations to deliver on business goals by powering talent growth and retention.

As an ethical, inclusive, female-led organization, Inteltek is intentional about ensuring diverse representation within our content and proactively building relationships with minority-owned suppliers. By embracing volunteerism, ensuring ethics and inclusion company-wide, and collaborating across organizations, Inteltek helps advance ILTA's values of nurturing talent, respecting colleagues, and fostering a trusted, diverse legal environment. Inteltek's commitment to diversity and inclusion shines through their content, connections, and contributions.

NetDocuments

LOGO

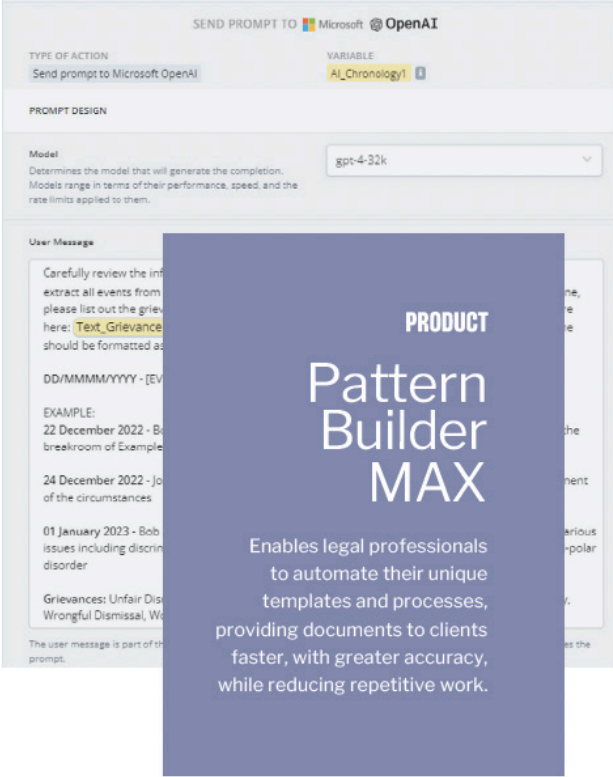


WEBSITE

netdocuments.com

NetDocuments has been delivering reliable innovation to help legal professionals do their best work for over 25 years. They partner with customers and communities like ILTA to solve current challenges and anticipate future needs throughout the document lifecycle. In 2023, NetDocuments applied that same innovative spirit to launching Gen AI-powered solutions within the legal industry.

In July 2023, NetDocuments announced ndMAX, a series of Gen AI-powered products designed to streamline the entire legal workflow. They released PatternBuilder MAX in October 2023 after an extensive customer co-development process. By integrating Gen AI with customers' content and their no-code app-building solution, PatternBuilder MAX, NetDocuments made radical strides towards transparent solutions for the endlessly bespoke needs of legal professionals. The Legalweek Leaders in Tech Awards recognized PatternBuilder MAX for Best Use of Artificial Intelligence for Contract, Document & Project Management.



NetDocuments feels a unique calling to help inform the legal community about Gen AI. The risks, the benefits, how it works, and how legal professionals can use it responsibly. They believe solution providers must share educational content about emerging AI trends, challenges, and best practices with the legal community through reports, podcasts, webinars, conference sessions, and more. NetDocuments' commitment to ILTA's community goes beyond delivering innovative products. They encourage team members to engage, volunteer, and serve on planning committees.

Thomson Reuters

LOGO



As providers of highly specialized information-enabled software and tools for legal, tax, accounting, and compliance professionals combined with the world's most global news service, Thomson Reuters delivers the intelligence, technology, and human expertise their clients need to find trusted resources for their most important decisions.

Thomson Reuters launched CoCounsel, the world's first Gen AI legal assistant, in 2023, a watershed moment for developing professional-grade solutions powered by Gen AI. CoCounsel provides sophisticated answers to complex legal questions, freeing legal professionals to do higher-value, strategic, and creative work. It is the first Gen AI legal solution to combine the power of large language models with a grounding in Thomson Reuters' expert attorney editors' classification and analysis to prevent hallucinations and inaccurate results. CoCounsel is designed with technical controls and data governance to meet legal professionals' ethical and confidentiality obligations.

CoCounsel performs a range of litigation and transactional tasks in minutes. Its responses are founded on more than 150 years of Thomson Reuters classification, analysis,

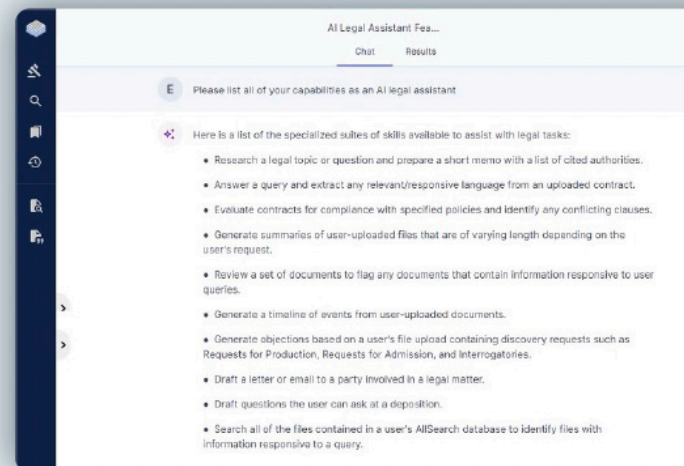
WEBSITE

thomsonreuters.com

PRODUCT

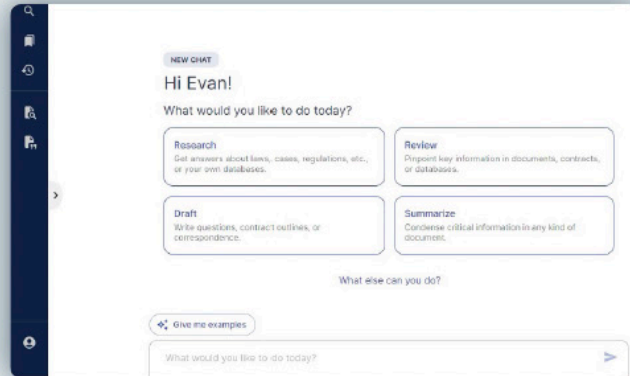
CoCounsel

The world's first Gen AI legal assistant, designed with technical controls and data governance to meet legal professionals' ethical and confidentiality obligations.





CoCounsel's UI made clear what it could do and that responds to natural language.



and editorial knowledge from subject matter experts and attorney editors. AI-assisted research employs Retrieval Augmented Generation (RAG) to prevent the large language models (LLMs) from making up things like case names and citations by focusing the LLMs on the actual language of Westlaw content. Employing end-to-end data encryption, ensuring lawyers' and their clients' data is always secure and private, making it possible for users to take advantage of its incredible capabilities without compromising their professional and ethical obligations. It offers a breadth of capabilities, content depth, and results reliability unmatched by any other professional-grade Gen AI product.

Thomson Reuters began 2024 with over 150,000 legal professionals using their Gen AI solutions. At heart, they are a content-driven technology company powering the world's most informed professionals, institutions, and society. Their work helps to create the backbone of legal and tax systems, providing accurate information that supports objective and fair outcomes.

Today, the Thomson Reuters Foundation's TrustLaw program is the world's largest broker of free legal services to NGOs and social enterprises and has organized \$125 million of free legal assistance to organizations worldwide.

This work is reinforced at the Thomson Reuters Social Impact Institute, which creates opportunities for innovation, community investment, volunteer impact, and sustainable corporate citizenship.

Thomson Reuters' core values of trust, partnership, innovation, and performance provide the foundation for fostering an inclusive workplace that supports the diversity of our talents, ideas, and experiences, where all employees are valued and can reach their full potential.

FUN FACT

By February 2024, CoCounsel had read over 640 billion words or nearly 1.3 billion documents. When laid end-to-end, these documents would circle Earth almost 9 times!



TRAILBLAZER OF THE YEAR

ABOUT

The Award

The Trailblazer Award is designed to recognize a collaborative initiative between a member entity and a business partner entity. This collaboration will be an early deployment of a new product and/or service.

2024

Nominees



WARD & SMITH + ODDR



KING & WOOD MALLESONS + JIGSAW



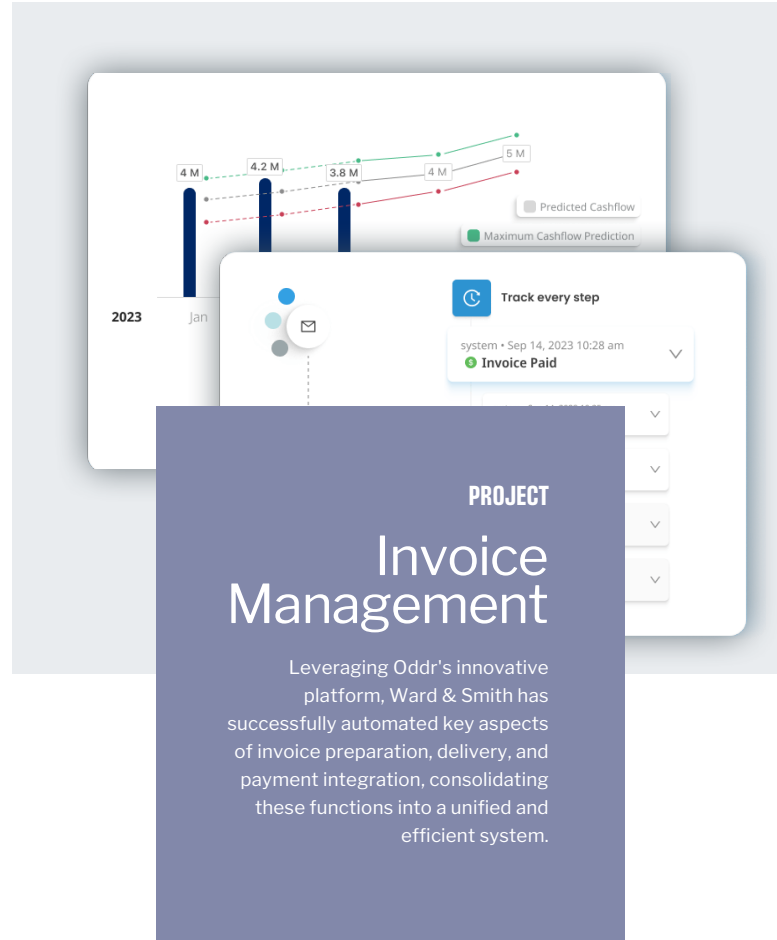
PAUL HASTINGS LLP + PASSTHROUGH

Ward & Smith + Oddr

Ward & Smith forged a strategic partnership with Oddr to optimize invoice management processes by minimizing outstanding days and mitigating associated write-offs, particularly for aged invoices. This collaboration focused on enhancing the overall experience for Ward & Smith's clients by streamlining the receipt, review, and payment of invoices. Leveraging Oddr's innovative platform, the firm successfully automated key aspects of invoice preparation, delivery, and payment integration, consolidating these functions into a unified and efficient system. This strategic vision underscored their commitment to modernizing operations and elevating client satisfaction.

Oddr dedicated significant time and effort, frequently meeting and engaging extensively with not only Ward & Smith's team but over 130 experts across the legal industry, including CFOs, CIOs, and Directors of Finance and Revenue, to gain a profound understanding of the challenges faced by law firms in billing, collections, payments, and reconciliations. Ward & Smith collaborated closely with Oddr's core team throughout the development and implementation phases to ensure alignment with their operations. The firm was committed to upholding best practices and ensuring seamless platform adoption. This commitment required unwavering support from the firm's leadership.

The project's risk management strategy revolved around several fundamental principles. Establishing open channels of communication and using them often was essential. Transparency and honesty were paramount throughout the project. Moreover, Oddr adopted an iterative approach to designing and implementing the platform. Oddr prioritized



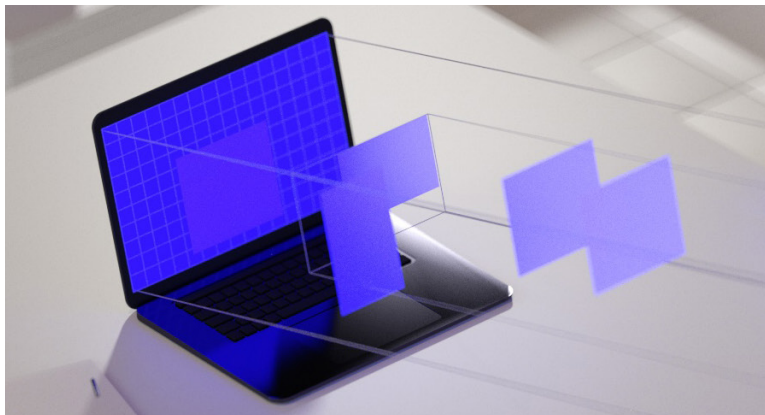
providing users hands-on experience and swiftly implemented requested updates with high-quality standards. They partnered closely with Ward & Smith to manage expectations internally and externally.

The Oddr team worked with the firm to seamlessly incorporate the Oddr platform into its core processes. This was achieved through robust out-of-the-box integrations, minimizing the need for manual intervention and ensuring a frictionless transition. Ward & Smith recognized the need to manage changes effectively across various stakeholders, including internal teams, billing attorneys, leadership, and clients. The firm collaborated closely with Oddr to address this challenge and adopted a phased rollout approach.

King & Wood Mallesons + Jigsaw

King & Wood Mallesons (KWM) Real Estate Practice recently identified a pain point frequently encountered across the firm. Real Estate transactions are often complex, with critical deadlines for many parties extending over a long time, up to decades in some instances. The lawyers involved, as well as client representatives, will likely change. Transitions between colleagues can be challenging, and clients often rely on legal firms to hold project knowledge assumed over a long period.

Legal professionals at KWM needed help accessing, maintaining, and centralizing critical documentation and experienced challenges communicating key events with clients over extended timelines. The most effective solution was partnering with a software provider to identify or build a system that maintained a visual representation of key events throughout the lifecycle of real estate transactions and linking the events to their supporting documentation in file storage.



KSW worked with Jigsaw in 2021 to roll out and onboard the Structure Chart software. Record levels of adoption and positive user feedback from this collaboration led to KWM and Jigsaw receiving the 2021 ILTA Distinguished Peer Award for Trailblazer of the Year. The trusted relationship made Jigsaw a natural choice for this solution-driven KWM project.

Assembling the right people from senior leadership and effective practice in both organizations was the most essential risk mitigation in the project. An experienced business and product manager led the Jigsaw team coaxed out of retirement specifically for this project, and a senior developer with more than 20 years of software development experience was brought in to lead web development. Daily discussions between KSW and Jigsaw team members provided vital feedback on all factors influencing user experience.

Partnering can be challenging. Ensuring outcome alignment and establishing deep trust and collaboration via open communications are critical for success. Commitment to a clearly articulated shared goal, unlimited access to seasoned professionals for short-cycle feedback and testing, and the skill and dedication of Jigsaw's development team were the keys to successfully delivering their Timelines product.

PROJECT

Timelines

A system that allows the project team to maintain a visual representation of key events and link these to the supporting documentation and file storage. This timeline view would provide an accessible activity plan, highlight milestones, enable each team member to maintain a common understanding of the project, and allow lawyers to represent several scenarios for clients visually.

Paul Hastings LLP + Passthrough

Paul Hastings embarked on a digital transformation journey to automate the complex process of ensuring that the multitude of documents associated with fundraising is complete and correct. To achieve this goal, Paul Hastings partnered with Passthrough to create PHundRaiser. PHundRaiser allows Paul Hastings to customize the entire subscription document process for the individual needs of each client and their funds to ensure the necessary compliance with governmental and business requirements. It provides clients and their investors with a customized, more efficient, and effective onboarding experience.

Attorneys at Paul Hastings now use PHundRaiser to track documents and the entire process by digitizing hard copy sub docs into a single, streamlined workflow. Investors can seamlessly complete, review, and sign their sub docs, uniquely and specifically designed to include only the questions necessary for that investor, on a single platform. The platform also allows attorneys to communicate directly with investors through the platform instead of relying on multiple scattered email threads, attachments, and unwieldy spreadsheets.

PHundRaiser differentiates Paul Hastings as an innovative leader committed to improving client services. The platform and its development process align with the firm's mission of promoting a culture of



PHundRaiser
PAUL HASTINGS

PROJECT

PHundRaiser

In partnership with Passthrough, PHundRaiser was created to enable customization of the entire subscription document process for the individual needs of each client and each of their funds to ensure the necessary compliance with governmental and business requirements.

excellence and superior execution. Combining outstanding legal guidance with the ingenuity of advanced tech solutions enhances efficiency and creates a better experience for our clients. This approach contributes to Paul Hastings' best-in-class legal service delivery. PHundRaiser also improves in-house lawyer satisfaction. The bespoke automated system eliminates the frustrating and time-consuming process of manually tracking investor information and chasing investor data via countless emails.

While many firms introduce technology to help lawyers with their everyday practice, tackling a client-facing offering is an entirely different undertaking. A client-facing offering, such as PHundRaiser, required a change to the firm's mindset. They shifted their perspective to think less like a large law firm and more like a startup company.

Paul Hastings partnered with a technology solutions provider, Passthrough, for the PHundRaiser project. The partnership's proverbial "secret sauce" was Paul Hastings' ability to select a vendor partner that shared their similar mission of excellence and goals of superior execution and client service. Together, they resolved to build a solution that genuinely improved the transactional experience of all three groups using PHundRaiser, the firm's lawyers, clients, and investors. Passthrough quickly met the firm's non-negotiable requirements with enterprise-level security and privacy protections, SOC II Type 2 certification, GDPR compliance, and regular penetration testing.

Throughout the partnership, members of the Passthrough and Paul Hastings teams practiced active listening and engaged authentically. The teams helped ensure success by including the right voices in planning and implementation discussions. Ultimately, the partnership and project were highly successful because the two parties decided to align with and remain focused on a common goal. Both Passthrough and Paul Hastings collectively prioritized the needs of all anticipated PHundRaiser users and relentlessly executed the shared vision until an elegant, robust solution that delivers real value to the firm's lawyers and clients was launched.

Paul Hastings also created an internal culture of PHundRaiser champions. Attorneys were equipped with a comprehensive marketing toolkit and given training on using it. In this way, the firm ensured their lawyers could effectively demonstrate to clients how valuable PHundRaiser is for their business and investors. This is an invaluable strategy that Paul Hastings plans to utilize for future product launches.

The screenshot displays the PHundRaiser web application interface. At the top, the breadcrumb navigation shows 'Preferred Return' and 'Passthrough Preferred Return, LP'. The main content area is titled 'General Information' and contains a form with the following fields:

- Is the Investor a natural person (including IRAs, Keogh plans, and joint tenants) or as an entity? **Natural Person**
- What's the Investor's full legal name? **LP 1**
- For purposes of preparing a Schedule K-1, enter the state of jurisdiction of the Investor. **New Mexico**
- Enter the Investor's Social Security Number *****-**-******
- Enter the Investor's postal address **115 Broadway, New York, New York, US, 10006**

At the bottom of the form, there is a '< Back' button and a 'Confirm' button. Below the 'Confirm' button, it says 'Next: Capital commitment'. On the left side, there is a vertical navigation menu with steps: Review (checked), General Information (selected), Capital commitment, Contact (checked), Bank (checked), Status of applicant, Accredited investor, Qualified purchaser, Document Collection, and Confirm & sign.

PHUNDRAISER

Rather than spending countless hours manually tracking and chasing investor information via emails and spreadsheets, PHundRaiser offers streamlined workflows, customized trackers, and easily exportable data.

TRANSFORMATIVE PROJECT OF THE YEAR

ABOUT

The Award

The Transformative Project of the Year Award is intended to recognize an ILTA member entity with 100 or more lawyers for their achievement in planning and successfully implementing a transformative project.

2024

Nominees



DAVIS WRIGHT TREMAINE

DWT.AI "Prose"



OGLETREE DEAKINS

Client Portal



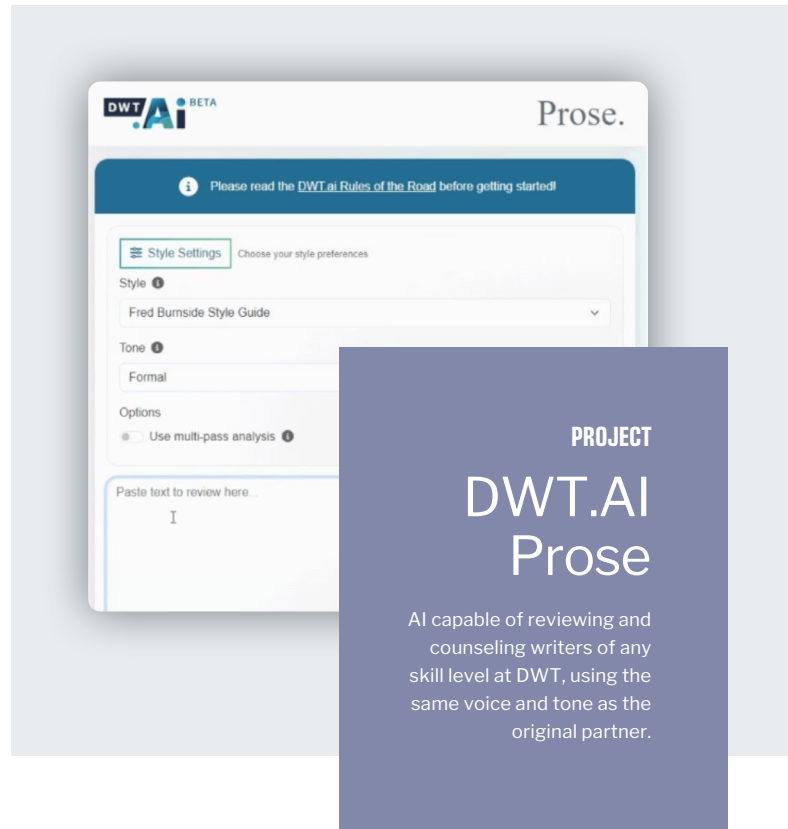
BAKERHOSTETLER

IncuBaker: Pixel Tracking Service

Davis Wright Tremain

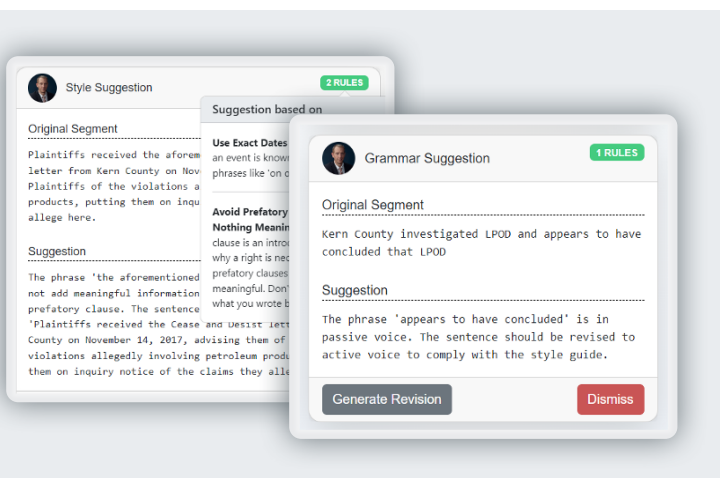
Davis Wright Tremain's DWT.AI "Prose" project is the industry's first use of AI technology that enhances the cultural experience of professional development within a law firm. By leveraging machine learning (ML) to analyze the writings of Davis Wright Tremain's (DWT) most prolific partner authors, they can now generate style guides that replicate their voice and style. These guides are integrated into a GPT4 Large Language model, resulting in an AI-powered tool capable of reviewing and counseling writers of any skill level at DWT, using the same voice and tone as the original partner.

In an era where remote work has made training and mentorship more challenging than ever, DWT Prose offers a way to scale the availability of our top attorneys in a manner that would otherwise be impossible. While acknowledging that there is no true substitute for one-on-one mentorship, the utility offered by an AI tool that can review first drafts and suggest personalized, subjective changes that would otherwise consume valuable



Partner/Associate mentorship time cannot be ignored. The DWT.AI "Prose" project has transformed the way DWT approaches professional development and document review, bringing exceptional innovation and added business value to their firm.

Diversity, equity, and inclusion (DEI) are part of the fabric of Davis Wright Tremain. Their vision involves fostering a culture where all talented individuals—including those who are traditionally underrepresented in the legal profession—can have, and can see, a path to success. Giving back is a priority at Davis Wright Tremain and attorneys are expected to do pro bono work both for personal development and as a matter of professional responsibility. Their attorneys have the freedom to take on matters that interest them personally. As a result, DWT represents pro bono clients from a broad spectrum of socio-economic, racial and ethnic backgrounds, and political viewpoints.



Ogletree Deakins

Ogletree Deakins, one of the largest labor and employment law firms representing management, successfully launched their Client Portal project in May 2023 at the firm’s premier client event, Workplace Strategies. The firm engaged client companies, provided a wonderful experience (demos, sign-up, takeaways, informational sessions), and secured more than 100 subscriptions by the end of the event. The largest innovation project in the firm’s history, the Client Portal transformed how Ogletree Deakins clients access premier resources by providing a secure front door to valuable client-facing tools and content. It offers prompt legal updates as well as benchmarking and claims dashboards. Template policies are available for individual access or using turnkey automated handbook builder technology. Template employment applications, offer letters, agreements, onboarding requirements and notices for every state and significant locality, training materials, law summaries, and step-by-step task guidelines for remote work are all readily available. The firm regularly adds new offerings to the Client Portal. It recently launched a FLSA White-Collar Exemption Audit Tool, a PAGA claims dashboard, and an NLRB Union Election Petitions Tracker.

The Client Portal is the primary channel for clients to access and fast-track compliance. It provides a flexible and scalable platform to accommodate added content, features, and collaboration needs readily. Additionally,

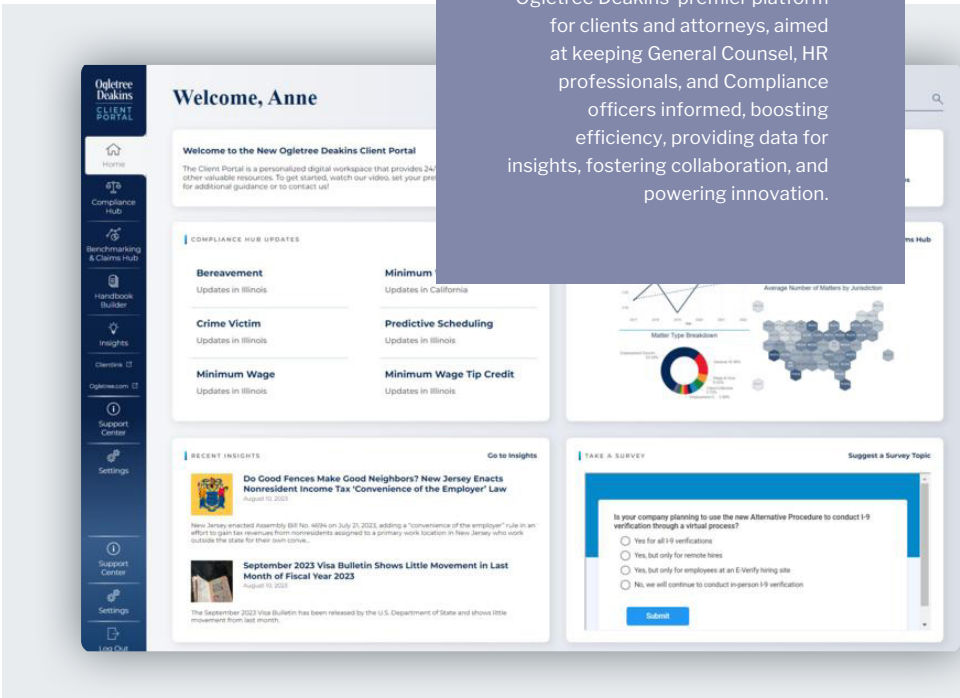
providing clients with easy access to information in a branded, well-designed platform allows the firm to scale and explore more sophisticated pricing models and content strategies as needed. Launching the Client Portal was the culmination of a highly collaborative, firm-wide strategic planning and feedback process involving a diverse set of key stakeholders and a robust project team representing the firm’s attorneys, paralegals, professional staff, office administrators, and executive and administrative leadership, and clients.

The fabric of Ogletree Deakins' culture is based on their Client Pledge. Many of these commitments align with ILTA's Core Values. Ogletree Deakins has a long-standing commitment to diversity, equity, and inclusion (DEI). It is a moral imperative and one of the firm’s core values outlined in its overall strategic plan.

PROJECT

Client Portal

Ogletree Deakins' premier platform for clients and attorneys, aimed at keeping General Counsel, HR professionals, and Compliance officers informed, boosting efficiency, providing data for insights, fostering collaboration, and powering innovation.



BakerHostetler

IncuBaker

BakerHostetler and its industry-leading captive Alternative Legal Service Provider (ALSP), IncuBaker, constitute the most extensive data-focused group in the United States. Their Digital Assets and Data Management Group (DADM) consists of an elite collective of over one hundred attorneys and award-winning technologists who advise clients on their needs throughout the global data ecosystem. The DADM team, together with IncuBaker, is now the largest practice group, sustaining the fastest growth within the firm.

Since 2022, litigation has increased, alleging privacy violations associated with pixel-tracking technology in websites and emails. Although Adobe, Alphabet (Google), and Meta (Facebook) typically supply corporations with free pixel trackers for use on their websites, the rise in pixel tracking litigation now involves even non-tech defendants alleged to have violated privacy laws through (1) failure to inform individuals of the data they are collecting; and (2) the distribution of sensitive health and financial information with third parties. IncuBaker's Privacy Management team quickly recognized clients' need to identify existing tracking pixels that collect and send user information to third parties in response to rising privacy litigation in connection with pixel trackers.



PROJECT

Pixel Tracking Service

In-house client service solution for identifying existing tracking pixels that collect and submit user information to third parties that is efficient, cost effective, and provides more consistency in service than the competition.

IncuBaker and BakerHostetler’s attorneys and internal Information Services (IS) professionals contemplated a faster, more cost-effective solution. The in-house solution created from this collaboration is a client service that led to systemic change and re-engineering in this space within the legal and privacy industry.

Thanks to the development of the Pixel Tracking service project, IncuBaker clients have a greater sense of what pixels are on their sites, what actions the pixels are taking related to user data, and how soon they will receive the pixel tracking report. IncuBaker’s team and IS department designed an innovative solution, internally, that outperformed other products on the market in both speed and cost.

Pixel trackers are ubiquitous on most public-facing websites. The available solutions to address and identify pixels were suboptimal due to the high data analysis costs and lengthy turn-around times to generate reports and provide actionable advice to the client. There is an impetus to create accurate reports as soon as possible, often due to litigation. Litigation over pixels has increased in recent years as decades-old and newer privacy laws are utilized in litigation where pixel tracking may be running afoul of these laws.

IncuBaker created a proprietary system to discover the pixel information sent to third parties. Once that information is collected, the report is reviewed by an IncuBaker Legal Process Engineer, edited, and quality-checked for clarity and accuracy. When that is complete, BakerHostetler attorneys review the report and analyze whether these trackers violate specific laws. Finally, the final report is delivered to the client along with legal analysis, advice, and a clear action plan.

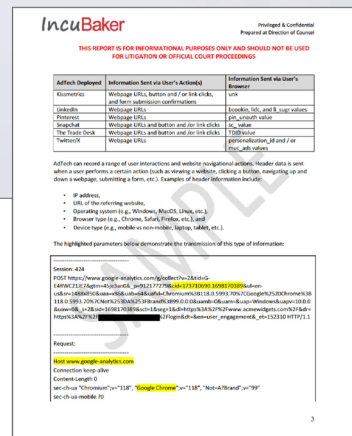
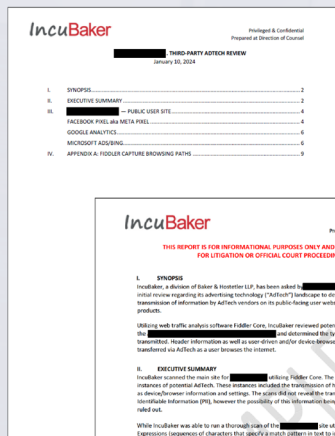
The development of the Pixel Tracking technological service fosters trust between clients, BakerHostetler attorneys, and the IncuBaker Privacy Management team. The team of BakerHostetler professionals quickly recognized and understood the market and developed a new technological service to address the client’s needs. Pixel tracking creates an ethical dilemma by covertly capturing end users’ information without their knowledge or consent.

IncuBaker’s team consists of more than 80% diverse individuals, including ethnic minorities, gender diverse, and LGBTQ+ inclusive team members. This cross-collaborative relationship enabled diversity of thought and inclusion of ideas from a broader perspective.

PIXEL TRACKING SERVICE

The Deliverable

A written report delivered to clients that includes a third party ad tech review; synopsis; executive summary; public user sites: Facebook Pixel aka Meta Pixel, Google Analytics, Microsoft Ads/Bing; and an appendix: Fiddler capture browsing paths.





LIFETIME ACHIEVEMENT AWARD

ABOUT

The Award

The Lifetime Achievement Award is intended to recognize a career exemplifying the most impactful achievements and the highest standards of personal conduct. The recipient of this award should have achieved a record of contributions to the legal sector that far exceeds expectations and provides a model and inspiration for participation and involvement by others. Such a record will be demonstrated over an extended period of time in a number of different positions or capacities. The Lifetime Achievement Award is a record of achievement that demonstrates an individual's capacity for vision, innovation, collaboration, and motivation of others.

2024

Nominees

**PHILIP BRYCE**

Global Chief Knowledge Officer
Mayer Brown LLP

**MELANIE PREVOST**

Senior Director of Infrastructure and
Technical Support
Vinson & Elkins, LLP

**DAVID HORRIGAN**

Discovery Counsel and Legal Education
Director
Relativity

Philip Bryce

Global Chief Knowledge Officer
Mayer Brown LLP

Philip was one of the first full-time, strategic knowledge management leaders at a large U.S. law firm. His role as Knowledge Resources Manager at Debevoise and Plimpton began in 1999. Since then, Philip has served as a KM leader at large law firms, including White & Case (2004-2015) and Mayer Brown (2015-present). He is a passionate and intelligent leader who advocates for efficiency and innovation.

Philip refines concepts around enterprise search, matter profiling and other data capture, the processing and storage of electronic closing sets, precedent libraries, law firm referral systems, and other KM-related approaches and tools. He began as a KM professional at Debevoise & Plimpton before lawyers at law firms used computers and was one of the individuals at White & Case LLP with key input about the development and improvement of that Firm's deployment of enterprise search. He helped both firms deploy "Knowledge Bank" precedent systems that make good use of existing technology, including a "filter by folder" functionality. At Mayer Brown, Philip helped lead the development of a U.S. Commercial Litigation Process Map. He configured InterAction (CRM system) to function most efficiently as a local/recommended counsel referral system.



LINKEDIN /philipbryce

Philip helped create the tone and community ethics for the legal KM community by being inclusive, inquisitive, intelligent, and fair at the outset. He believes that the frank and free exchange of ideas leads to innovation and advancement. Philip graduated from the University of Connecticut School of Law in 1978. He is a long-term provider of mentorship for law students, as well as a regular guest lecturer on the business of law and knowledge management at both Cornell Law School and his alma mater. In 2001, Philip founded a KM group for large law firms in NY who met roughly monthly. The group created the annual global law firm KM summit that occurs in New York after Legal Week, an event that now is known as SKILLS (Strategic Knowledge and Innovation Legal Leaders' Summit).

Volunteerism has been meaningful and satisfying for Philip. He appreciates opportunities to provide support and guidance for those entering the legal profession or choosing to focus particularly on knowledge management or legal innovation. Since 2019, he has served as a member of the Board of Trustees of Practising Law Institute (PLI), and for several years was the Chair of the Board's Nominating and Governance Committee. Philip is a frequent presenter and speaker at NY law firm KM group events, global events, ILTA and ARK conferences, and David Cowen's SOLID events.

When Catherine Monte first developed the idea of having fledgling legal knowledge management organizations gather under the ILTA umbrella, Philip and many others embraced the initiative. Since then, many key players in the KM community have filled leadership and planning roles with ILTA. He believes the KM and related disciplines have brought new dimensions to ILTA and helped accelerate the connections between legal business and technology. Moreover, ILTA participation helped Philip develop invaluable personal and professional connections and extensive knowledge.

PHILIP BRVCE

Awards & Certifications

2022 Mayer Brown Knowledge Management Business Services team was a finalist for a Financial Times Business Services Team of the Year award.

"Phil is a pioneer and visionary in the legal KM industry and his contributions to the field over the past 20+ years are truly unparalleled."

Melanie Prevost

Senior Director of Infrastructure and Technical Support
Vinson & Elkins, LLP

M

elanie Prevost is the Senior Director of Infrastructure and Technical Support Services at Vinson & Elkins. Throughout her career, Melanie followed advice from her grandmother: do what you can to extend hospitality and treat people the way you want to be treated. She is committed to fostering an environment of trust, respect, and belonging for her team. Everyone has a role, and every role is necessary for a team to be successful.

Melanie works with her team to plan and implement Peer Datacenters to support the technical infrastructure outside of their offices. They built the firm's server structure, including virtual machines, network infrastructure and telecommunications in multiple geographically colocation centers. Melanie and her team operate office production systems in each of these colocation centers, rotating twice a year between the centers. This rotation ensures that the systems in each location work properly. The bi-yearly switch became the team's disaster recovery testing method and prepared them to respond to the Covid-19 pandemic with rapid, effective precision.



LINKEDIN /melanie-prevost-419a077

Melanie has volunteered with ILTA for over 17 years, over which she brought her signature inclusive ideology to the roles she filled within ILTA's community. Melanie attended her first ILTACON in 2007. Shortly after, she accepted a volunteer role as the Houston Member Liaison. She volunteered in that role through 2017, when she joined the Relationship Management Team who coordinated the Member Liaisons and the Women Who Lead (WWL) Advisory Committee. Her ten years of ML experience helped ensure that Women Who Lead content was planned and delivered to the local ILTA membership.

Coordinating local training meetings provided the opportunity for legal business professionals to attend meetings during the lunch hour at no cost to them or their employers. The mix of technical and soft skills presentations attracted a diverse audience and increased participation in these sessions.

Melanie is passionate about sharing her professional experiences and knowledge with others. She speaks at Vinson & Elkins events, as well as others like LegalWeek, Cowen Cafe, and recently to ILTA staff. She is adept in covering topics related to women's empowerment, imposter syndrome, and work/life balance.

Through ILTA, Melanie made lifetime friendships and gained mentors who were genuinely invested in her professional success. Those connections led to one of the most important milestones of her ILTA career, being on the discussion group which created and recommended the ILTA Core Value to "Foster diversity, equity and inclusion" throughout the ILTA community. Melanie strives to meet every core value when planning ILTA events for the Women Who Lead Advisory group. She looks forward to continuing to provide uplifting content for future events.

MELANIE PREVOST

Awards & Certifications

2021 ILTA Volunteer Award –
Highest of High Fives

Melanie is a true leader and visionary who has helped countless individuals with her guidance, support, and time invested in their professional development. Melanie is a very humble person who has the heart of a servant.

Lifetime Achievement

DAVID HORRIGAN

David Horrigan is Relativity's Discovery Counsel and Legal Education Director. For over two decades, David has advocated for the responsible use of advancing technology in the legal profession by sharing the story of legal technology with global audiences. Since reporting from the World Trade Center after the attacks of September 11, 2001, David has written hundreds of articles in the field of legal technology. Soon after the attacks, David and his colleague and mentor, Monica Bay, wrote articles about the human tragedy and legal technology disaster of 9/11. When the Twin Towers went down, all the servers went down as well. It is crucial to remember that 9/11 occurred before the SaaS Era of massive cloud computing. There was no cloud backup when the buildings crashed to the ground. David and Monica captured the critical story of how people collaborated to put things back together again—figuratively and

literally. Practitioners forgave deadlines and shared resources. It was a time when being a good person was more important than being a good lawyer. However, in the end, people discovered they could be good lawyers by being good people.

After his experience with 9/11, David has passionately dedicated his career and philanthropic spirit to sharing new ideas with people about how they can bring technology into the legal sector. This work includes serving as a volunteer finals judge and brief writer for the Federal Bar Association's Thurgood Marshall National Moot Court Competition. David is serving in his eleventh year as developer and moderator of the Relativity Fest Judicial Panel. For seven years, he has served as developer and moderator of the University of Florida Law E-Discovery Conference Judicial Panel. He has been a regular speaker and engages with program development at ILTACON each year since 2015.



LINKEDIN
[/david-horrigan-3a482a6](#)

THE RELATIVITY BLOG

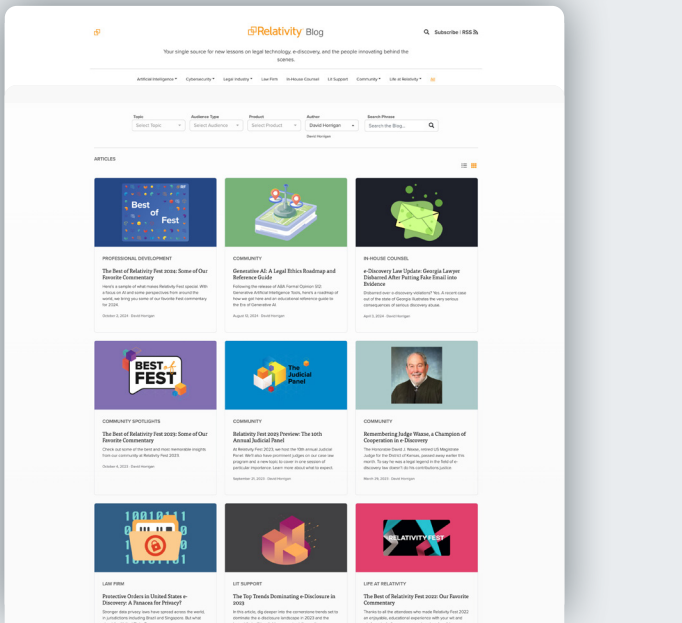
Articles by David

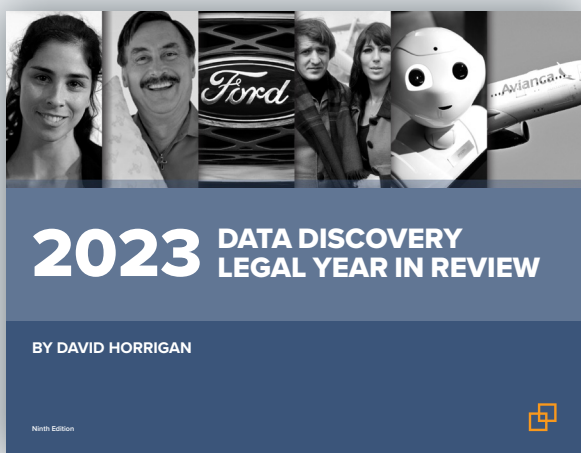
Since joining Relativity nine years ago, he has written 125 articles for The Relativity Blog, as well as articles for other publications. Read the articles online at:

relativity.com/blog

David's primary goal in advancing legal technology and technologists is ensuring that everyone is included. Legal technology can be challenging to understand. Whether hosting continuing legal education classes and presentations, writing articles, or releasing his annual e-book, David strives to give everyone a seat at the table. He believes that all legal tech professionals bring different skills and experience to the table. David chooses topics and cases for discussion that resonate with people in various roles. He understands that legal technology can be expensive for some firms and inclusivity is virtually impossible if what you do is too costly for many professionals.

A prolific author, David has written articles or been quoted in them over 1,000 times. As reporter and assistant editor at The National Law Journal, then staffer and contributor at Legaltech News, David wrote hundreds of articles. Since joining Relativity nine years ago, he has written 125 articles for The Relativity Blog, as well as articles for other publications. David's work has been cited by general news organizations, like The Wall Street Journal, American Public Media's Marketplace, TechRepublic, and The Washington Examiner. There are few higher honors a lawyer can receive than authoring or being cited in an academic law review article. David is the author or co-author of three law review articles. He has been cited 24 times in law reviews, including those of Emory University, the University of Florida, New York University, Northwestern University, the University of Texas, Yale University, and others.





ANNUAL E-BOOK

Data Discovery Legal Year in Review

In the book, David explores the decisions that may impact your legal team in the coming year and beyond. Download your free copy at:

relativity.com

Whether David is doing volunteer work for bar associations, continuing legal education programs, or writing articles, sharing the story of innovation in law and technology allows him to help legal tech peers advance their knowledge and careers. His goal is for the educational programs he produces—including an annual webinar with ILTA—to be trusted community resources, delivering relevant, timely, and accurate information. Creating these educational resources with a commitment to diversity, equity, and inclusion demonstrates David’s respect for colleagues and a commitment to the highest standards of ethics and professionalism.

Volunteering for ILTA has provided David with a pathway to help legal professionals on a global scale. His participation with ILTA has involved much more than merely showing up and speaking. Over 20 years ago, David covered what was then called “ILTA” (instead of “ILTACON”) for The National Law Journal and Law Technology News (now Legaltech News). This early coverage brought communal awareness to ILTA’s great work. The content David creates for ILTA and speakers he recruits bring a diversity of experience and viewpoints to the organization. Volunteering for ILTA with articles and program content has helped expand his reach for “sharing the gospel” of legal technology. The first word in ILTA is “International,” and volunteering for ILTA has allowed David to work with talented people around the world. Whether forming new international or U.S.-based friendships, volunteering for ILTA has given him new insights, experiences, and connections within the legal tech community.

Thank you!
JUDGES

Alexa Isaacs

Andrea Markstrom

Andy Jurczyk

Andy Wood

Ashley Kowitz

Beth Anne Stuebe

Beth Napear-Gum

Beth Thompson

Brian Bergquist

Chris Owens

Crystal Little

Daniel Creaney

Daryl Irby

David Clark

Dean Leung

Debbie Foster

Doreen Kaminsky

Dulani Moore

Elisha Blevins

Gerald Nguyen

Gina Buser

Jaen Boban

Jennifer Mendez

Jeremy Reed

Jill Okerlund Pigeon

John Graves

Jonathan Burley

Josh Wulf

Kat Freeman

Kathy Krieger

Kisha Brown

Kristina Niedringhaus

Lauren Higbee

Laurie Pierre

Leo Wang

Linda Vega

Lori Sykes

Lydia Flocchini

McKenzie Mayer

Myisha Aldridge

Paul Buckin

Peter Ezike

R. Amani Smathers

Reanna Martinez

Shannon Stevens

Sue Keno

TJ Johnson

Trish Dillon

ILTA's Awards of Excellence recognizes ILTA Member and Partner contributions, celebrating the diversity of and to laude the efforts ILTAns put forth creating content, influencing, mentoring, and adapting to ever-changing legal technology. This annual publication highlights the award recipients for the year.

awards.iltanet.org

