

EATING ALONE DINING TOGETHER

A YEAR OF INSIGHTS AND
INSPIRATION FROM
THE VIRTUAL LUNCH

BY ARI KAPLAN



WELCOME

The Virtual Lunch is the silver lining. It is lemonade. It reflects an effort to create community by building camaraderie and offering a forum for candid conversation.



On Sunday, March 15, 2020, I posted a brief update to LinkedIn notifying my network that I would be hosting a daily, half-hour Zoom call for one week in case anyone working from home wanted to take a lunch break and connect with peers. There was no agenda or script. It was essentially a networking “show about nothing.” I scheduled it for 30 minutes a day, but quickly adjusted it to last an hour. That week turned into months, which are now a year.

The initial conversations focused on the challenges of working from home, current events, and the timeline for “going back.” As the uncertainty became more long-term, we began discussing ways to thrive and succeed in a more remote environment. And, I started to invite guests to share their wisdom and offer guidance. Each did so and inspired us in their own way to reimagine our work and our approach to it in this new era.

From law professors to in-house counsel and from entrepreneurs to corporate leaders, there were so many lessons. This guide is an effort to capture the most powerful messages from the first year of the Virtual Lunch. In the sections where I do not identify a guest source, the perspectives are based on my notes from hundreds of hours of general discussion.

I am honored to share them with you and grateful to the entire Virtual Lunch community, particularly the “regulars” and sponsors, for being the best part of this initiative.

— Ari Kaplan, Editor

P.S. If you would like to watch the interviews with the guests of the Virtual Lunch, please feel free to [visit our YouTube playlist here](#).

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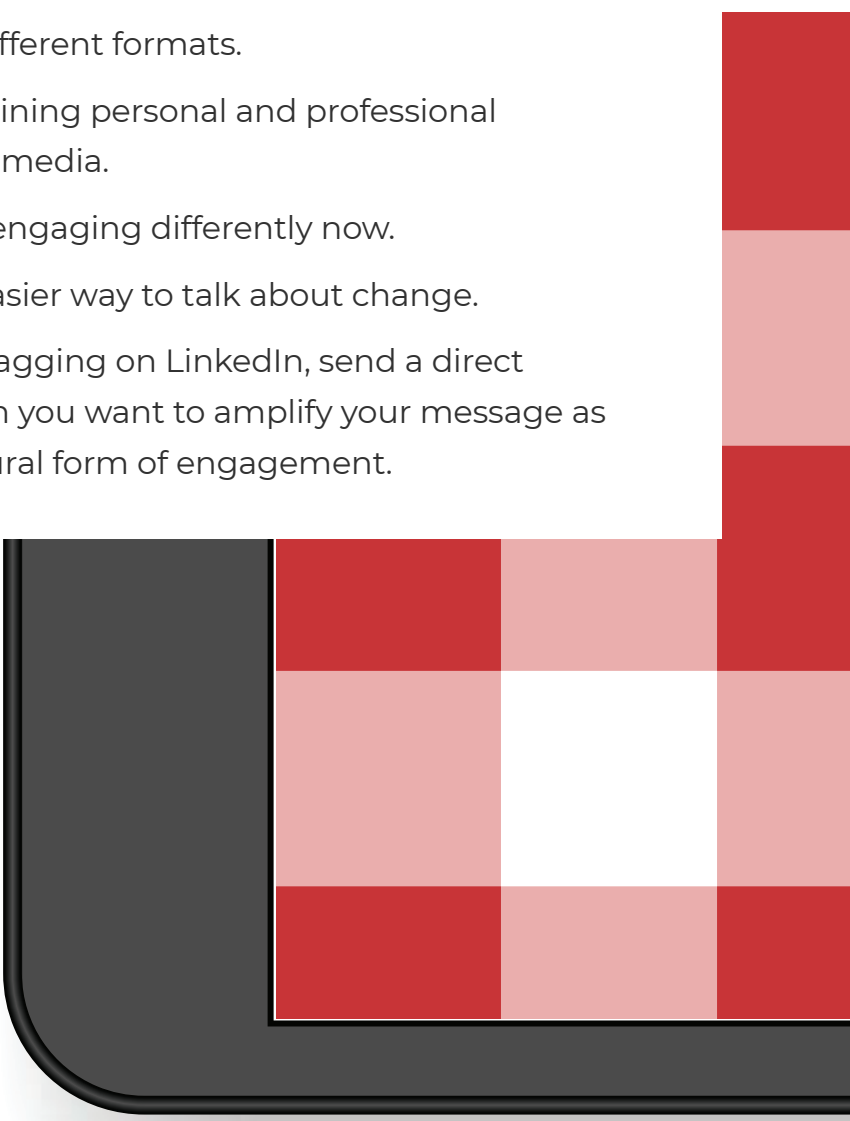
COMMUNICATION

When we started our conversations on the Virtual Lunch in March of 2020, there was a lot of uncertainty about maintaining connections. We naturally focused on effective ways to leverage social media, produce virtual events, and plan an array of meetings remotely. We had a lot of fun reimagining how we could communicate with one another and meaningfully engage at a distance.



REDEFINING ENGAGEMENT
CONTEMPLATING THE FUTURE OF CONFERENCES
REIMAGINING REMOTE MEETINGS
ENHANCING VIRTUAL PRESENTATIONS

Redefining Engagement

- Post good content with value.
 - Offering perspective is true thought leadership.
 - Good content shows that you are remaining current.
 - Short videos are of high value.
 - Make your content scroll-stopping or thumb-stopping.
 - Test your content in different formats.
 - There is value in combining personal and professional perspectives on social media.
 - Professionals may be engaging differently now.
 - Innovation offers an easier way to talk about change.
 - In lieu of expansively tagging on LinkedIn, send a direct message to the person you want to amplify your message as it is a much more natural form of engagement.
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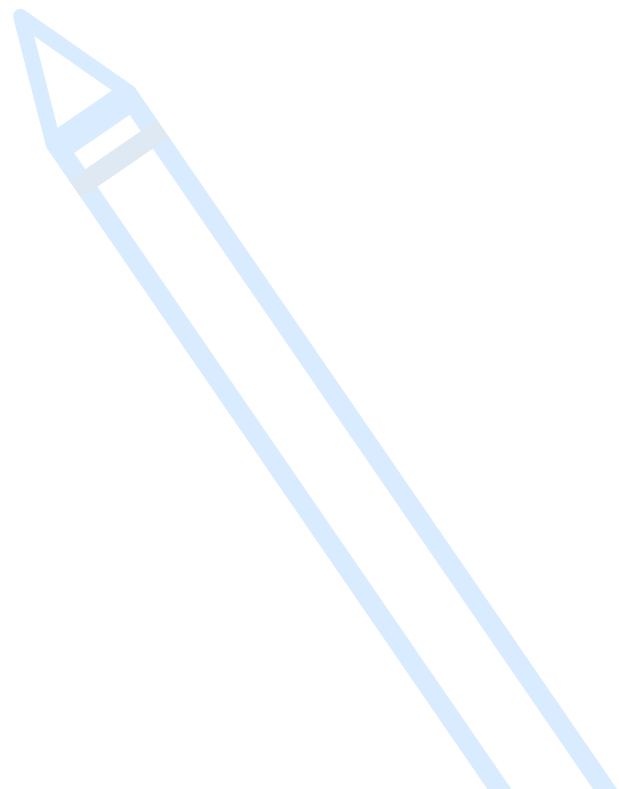
GUEST SPOTLIGHT

STEFANIE MARRONE

FOUNDER, STEFANIE MARRONE CONSULTING

- Use the Featured section of your LinkedIn profile.
- Claim your friendly LinkedIn URL.
- Add your LinkedIn URL to your email signature.
- Follow up on LinkedIn Notifications as they reignite relationships.
- Share your LinkedIn profile QR code.

"Adjust your social media message to the medium."





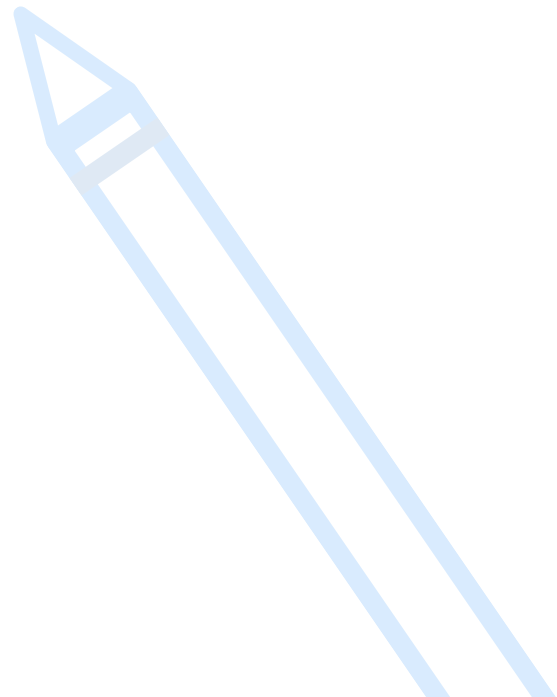
GUEST SPOTLIGHT

NANCY MYRLAND

PRESIDENT, MYRLAND MARKETING & SOCIAL MEDIA

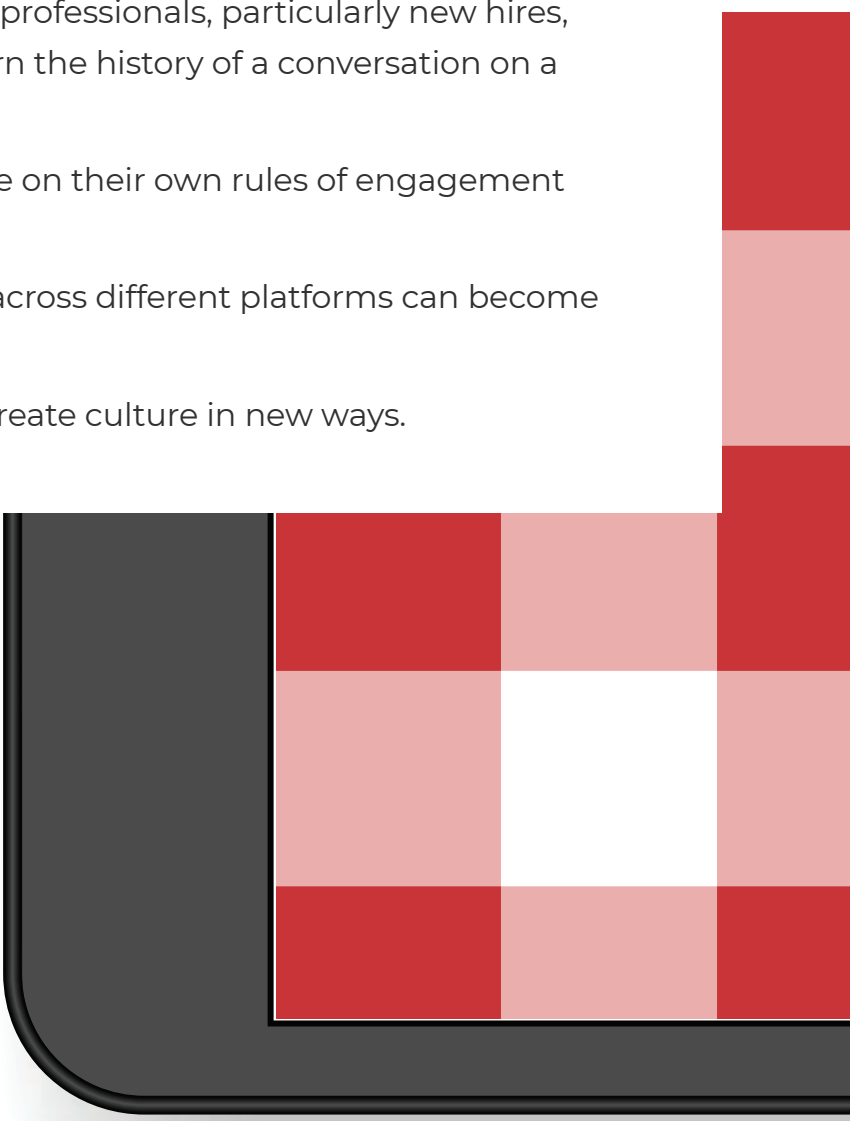
- Before you do anything else, go through every section that LinkedIn gives you on your profile to make sure it is full and complete.
- Interacting genuinely with people on social media and adding value to their content makes it more of a relationship-building experience than a broadcasting experience, which can actually turn people away from you.

***"As much as you can,
add value to what
others are doing."***





Remote Meetings

- People are likely to continue to embrace virtual meetings when they return to a traditional workplace.
 - Dress codes have changed for remote meetings.
 - Business etiquette rules for remote work vary.
 - Using tools such as Slack and Microsoft Teams for communication gives professionals, particularly new hires, the opportunity to learn the history of a conversation on a given issue.
 - Everyone has to decide on their own rules of engagement for different platforms.
 - Information overload across different platforms can become a problem.
 - We need to begin to create culture in new ways.
- 



GUEST SPOTLIGHT

MATT HOMANN

FOUNDER, FILAMENT

- Being 100% virtual has made us more human in the sense that we are literally seeing more of one another.
- When you're engaging with someone, you're also trying to pay attention to how you look, which doubles the cognitive load on your brain; it is even harder when looking at 20 people simultaneously so remove yourself from view to eliminate any distracting self-judgment.
- Focus on your ability to pay attention in a virtual environment.
- Virtual meetings should be shorter, distributed over longer periods, and ideally occur in the morning.
- We are going to see a huge rise in asynchronous collaboration.

"You have more permission to look real on video than you might have had in the past."



GUEST SPOTLIGHT

ANDREW NADEL

FOUNDER, CONNECTRSHIP

- Games assist in developing and maintaining relationships with clients and co-workers.
- A host who knows how to engage remotely and has a structured fast-paced program will ensure participation by all.
- Virtual events can be thematic and tailored to ensure that breakout/main rooms are utilized throughout the program.

"Games generate enthusiasm, are inclusive, and fuel dialogue among professionals."



The Future of Conferences

- Hybrid is now normal. Most events will have a virtual component going forward.
- We recognize that we are in the "beta" stage of the virtual conference experience.
- There is a meaningful difference between real-time programming and recorded presentations.
- A separate expo day may benefit virtual conference organizers.
- Virtual events should consider more sessions that are shorter.
- You can have a sales pitch from a sponsor in a virtual event, but it should be artfully integrated into the programming.
- Vendors can attract virtual event attendees with hands-on training, game shows, and practical tech tips.
- Breaks are critical at a virtual conference.
- Vendor giveaways require more creativity at virtual conferences.
- There are opportunities for sponsors to make a significant impact in a virtual event.
- In addition to content and networking, attendees are drawn to a conference for the fun, which includes virtual programs.
- Family, fun, community, camaraderie, and learning are essential elements of events, live or virtual.
- The Zoom chat could be replacing Twitter for events.
- There is more freedom of participation in a virtual event.



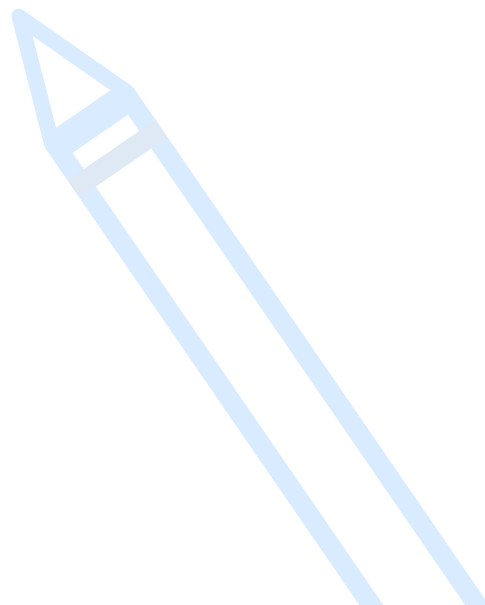
GUEST SPOTLIGHT

LARRY PORT

CEO, ROCKET MATTER

- Ensure that virtual event attendees and presenters have a frictionless experience.
- "Airport Signage" in a virtual event is critical.
- Incorporate fun and theatrics into virtual events as they make a big difference.
- Avoid too much back-to-back screen time.
- Give a sufficient amount of break time to allow attendees to earn CLE credit.

"You need an engaging emcee for your virtual events to make them really interactive."





GUEST SPOTLIGHT

JOY HEATH RUSH


CEO, INTERNATIONAL LEGAL TECHNOLOGY ASSOCIATION

- Data is much richer and more complete in a virtual event.
- It is important for a virtual conference organizer to own its data and manage the event directly.
- Even for those who are very experienced, remote public speaking can be very disorienting.
- In the virtual environment, the selection of speakers is more important.
- Virtual events offer access to speakers who would not be able to attend a live event.

"Look at the opportunities that a virtual event offers, rather than its limitations."



Enhancing Virtual Presentations

- Interview-style discussions are better than solo presentations.
 - Standing, rather than sitting, on camera can communicate a different message through body language.
 - Authenticity in storytelling is critical.
 - There is an increasing level of video fatigue.
 - It can be difficult to maintain the attention of the audience in a virtual presentation.
 - Use the polling feature to engage virtual attendees.
 - Have a colleague monitor the chat and highlight important comments.
 - Use props to help people re-center.
 - Use trivia and have attendees answer questions in the chat.
 - Keep the conversation going through social media.
 - Use compelling imagery and engaging content to stand out online.
 - Consider using a virtual scavenger hunt for online learning and development.
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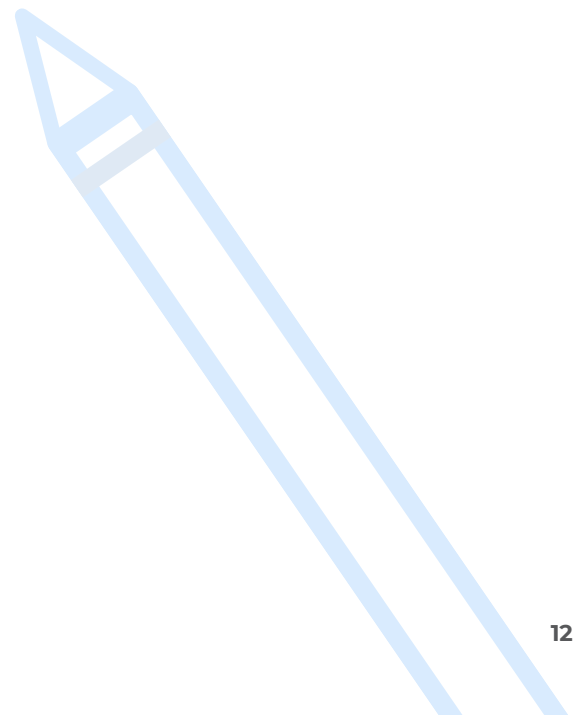
GUEST SPOTLIGHT

SACHIN BANSAL

COMEDIAN AND GENERAL COUNSEL, SECURITYSCORECARD

- Avoid jokes in email.
- When presenting, pause and take a beat because a couple of seconds of silence is powerful.
- Smile and engage your audience by making eye contact on screen and in person.

"Crowd work is a comedy technique you can apply to increase engagement in remote presentations."





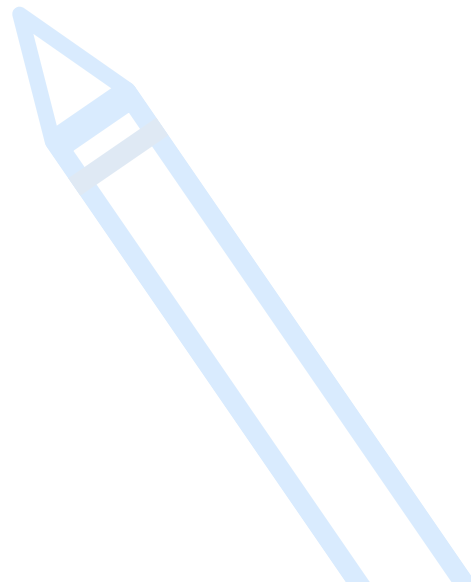
GUEST SPOTLIGHT

MARSHA REDMON

FOUNDER, MARSHA REDMON COMMUNICATIONS

- The goals for a remote background are to not distract and to look professional.
- The most important aspect of remote presentations is to have light on your face, not direct sunlight but near natural light.
- Avoid light directly above your head.

"You want people to notice you and your message, rather than focus on what's in the background or what you're wearing."





GUEST SPOTLIGHT

STUART TEICHER

ETHICS CLE SPEAKER

- Avoid biting off more than you can chew when it comes to utilizing the different functions of a virtual meeting platform.
- In a virtual meeting, partner with someone who can act as a moderator and read the chat questions for you.
- You need to be more methodical in a virtual presentation, control your pace, and deliver your content in a more concise manner.

"Navigating an online presentation takes practice."

PERSONAL DEVELOPMENT

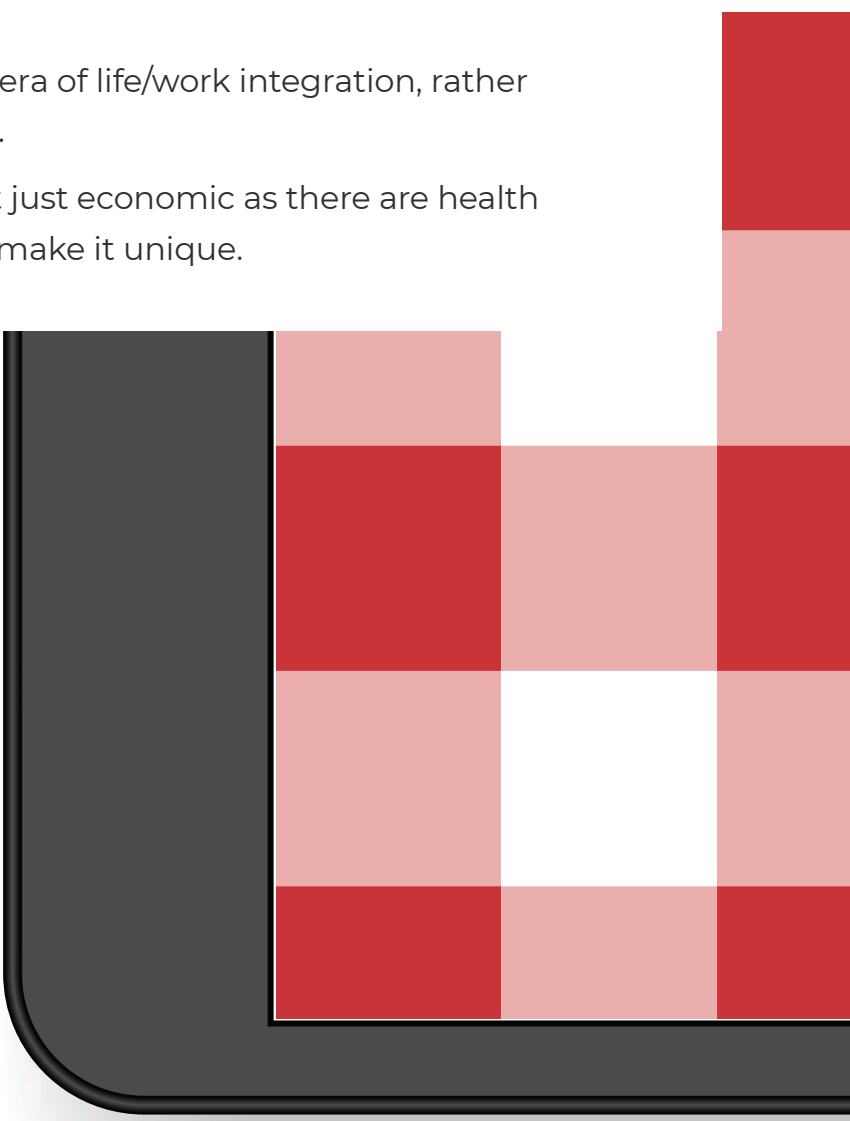
As the reality of the pandemic set in, we quickly realized that we would be working remotely and experiencing various levels of isolation for some time. Our focus, therefore, turned to wellness, productivity, and finding creative ways to succeed in a virtual environment. We also spoke about opportunities for embracing diversity and inclusion, empowering career development, and expressing gratitude as often as possible.



FOCUSING ON PRODUCTIVITY
EMPHASIZING WELLNESS AND MINDFULNESS
MASTERING REMOTE WORK
EMBRACING DIVERSITY AND INCLUSION
CONCENTRATING ON CAREER DEVELOPMENT
EXPRESSING GRATITUDE
PROMOTING YOUR WORK



Emphasizing Wellness and Mindfulness

- The future of vacations is unclear.
 - Companies may incorporate newfound hobbies as part of their corporate programs.
 - Regular exercise is essential, especially when you cannot take time off.
 - We have moved to an era of life/work integration, rather than work/life balance.
 - The current shift is not just economic as there are health and safety issues that make it unique.
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GUEST SPOTLIGHT

JEENA CHO

FOUNDER, THE RESILIENT LAWYER

- Unlearning behaviors and prioritizing are key.
- There is a disconnect between what you know to be true and how you spend your time.
- The model of exchanging time for money encourages inefficiency.

"Law firms need to institutionalize allies."



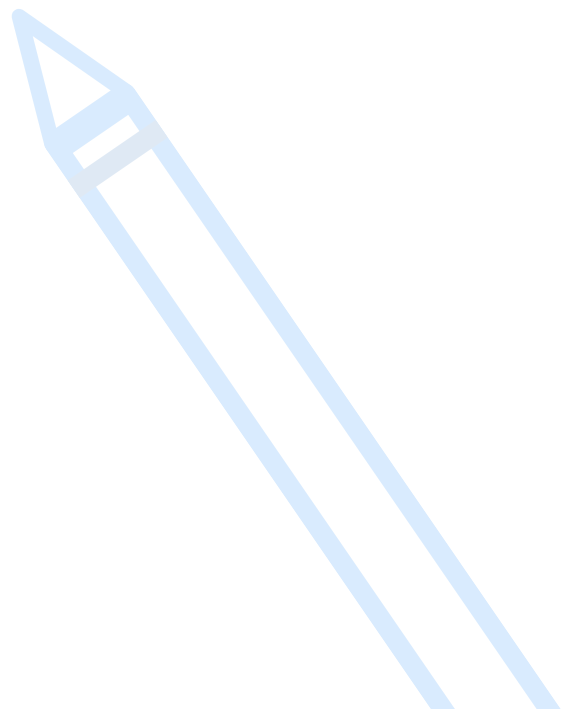
GUEST SPOTLIGHT

JON KROP

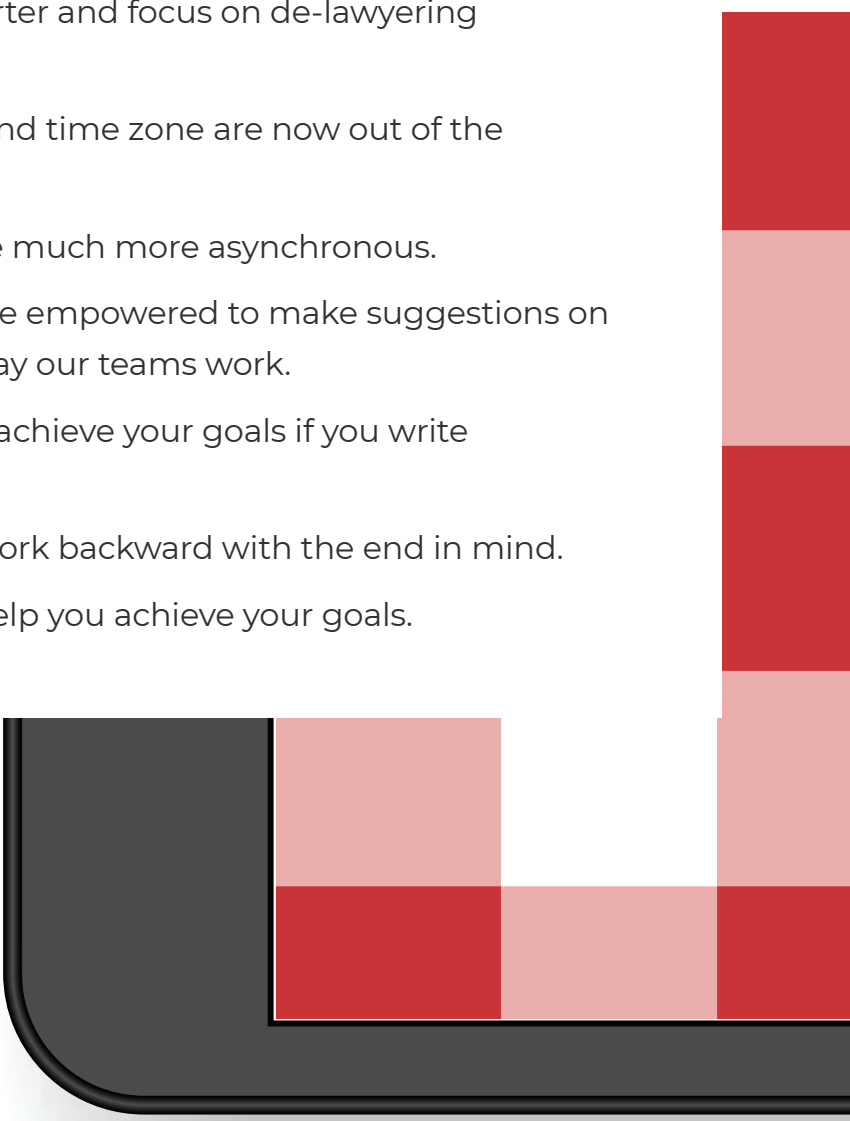
FOUNDER, MINDFULNESS FOR LAWYERS

- Mindfulness meditation is the gold standard in 'rolling with it.'
- It is very hard to get people to change and to sell them on things in which they are not interested.
- In a moment of high stress, try to slow the rate of your breathing.
- Meditation requires consistency.

"People are having their illusions of stability stripped away from them in this environment."



Focusing on Productivity

- People are just tired, despite their productivity.
 - We have to shut down at some point or wellness will become even more of an issue.
 - We live by defined periods of time and not having that definition can be disconcerting.
 - We need to work smarter and focus on de-lawyering activities.
 - Geographic location and time zone are now out of the overall mix.
 - The world will become much more asynchronous.
 - We should all feel more empowered to make suggestions on how to improve the way our teams work.
 - You are more likely to achieve your goals if you write them down.
 - When setting goals, work backward with the end in mind.
 - Create systems that help you achieve your goals.
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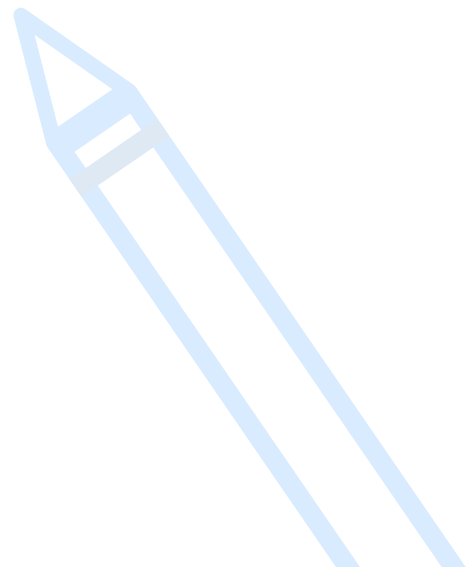
GUEST SPOTLIGHT

PAUL BURTON

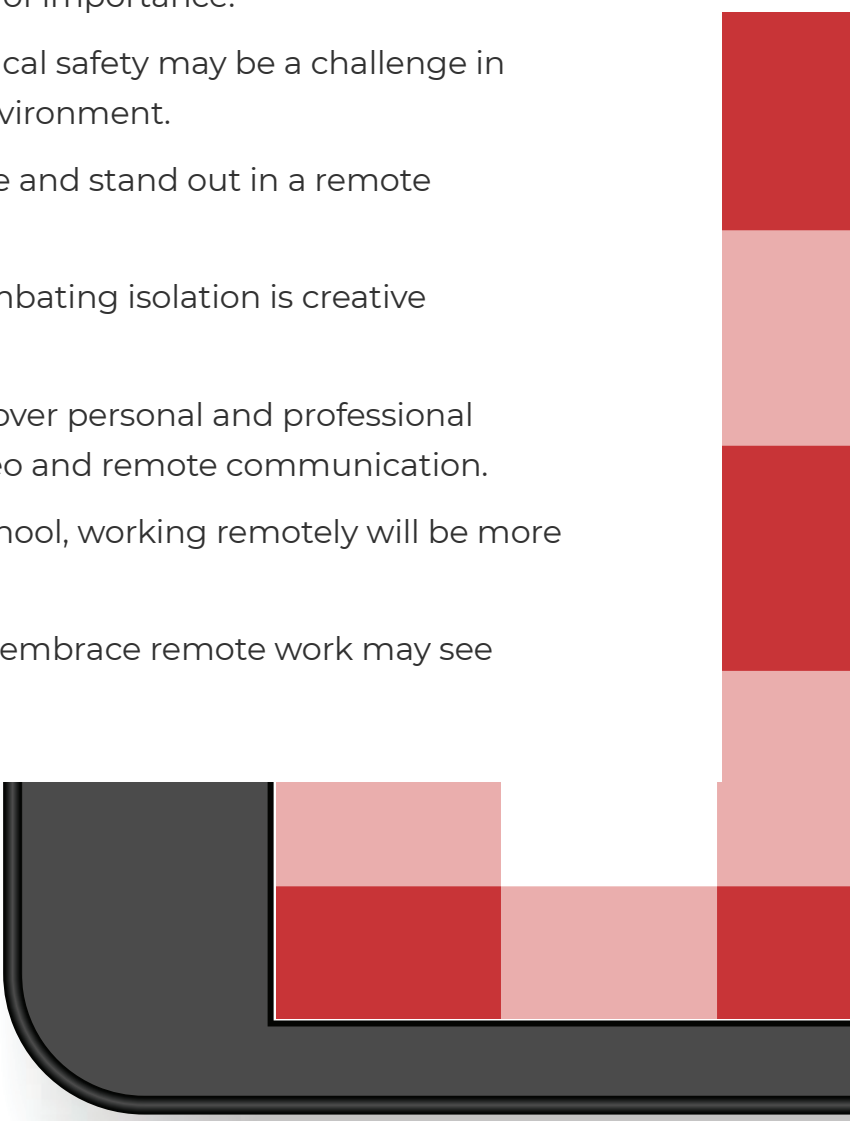
FOUNDER, QUIETSPACING

- The pandemic has impacted the difference between home and work more emotionally than realistically.
- Enhance your work/life balance by creating a daily schedule and designating a physical work space.
- Develop internal and external quiet to increase focus.
- When you become distracted or feel the urge to be distracted, use a quick-capture device, such as a pad to take notes.
- Your life is 24/7 and at its end, the question will be whether you made the best use of your time here.

"The brain is a sprinter, not a marathoner, so you need time to recharge."



Mastering Remote Work

- There is no longer a stigma associated with working from home.
 - The importance of data security is rising in the work-from-home environment.
 - Work-life boundaries have changed and returned to their heightened level of importance.
 - Embracing psychological safety may be a challenge in a work-from-home environment.
 - It is harder to be visible and stand out in a remote working environment.
 - One technique for combating isolation is creative networking.
 - There is more control over personal and professional relationships with video and remote communication.
 - Once kids return to school, working remotely will be more effective.
 - Companies that don't embrace remote work may see higher turnover.
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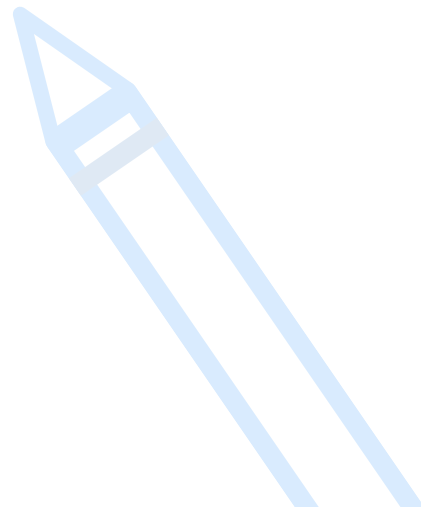
GUEST SPOTLIGHT

BARRON HENLEY

PARTNER, AFFINITY CONSULTING

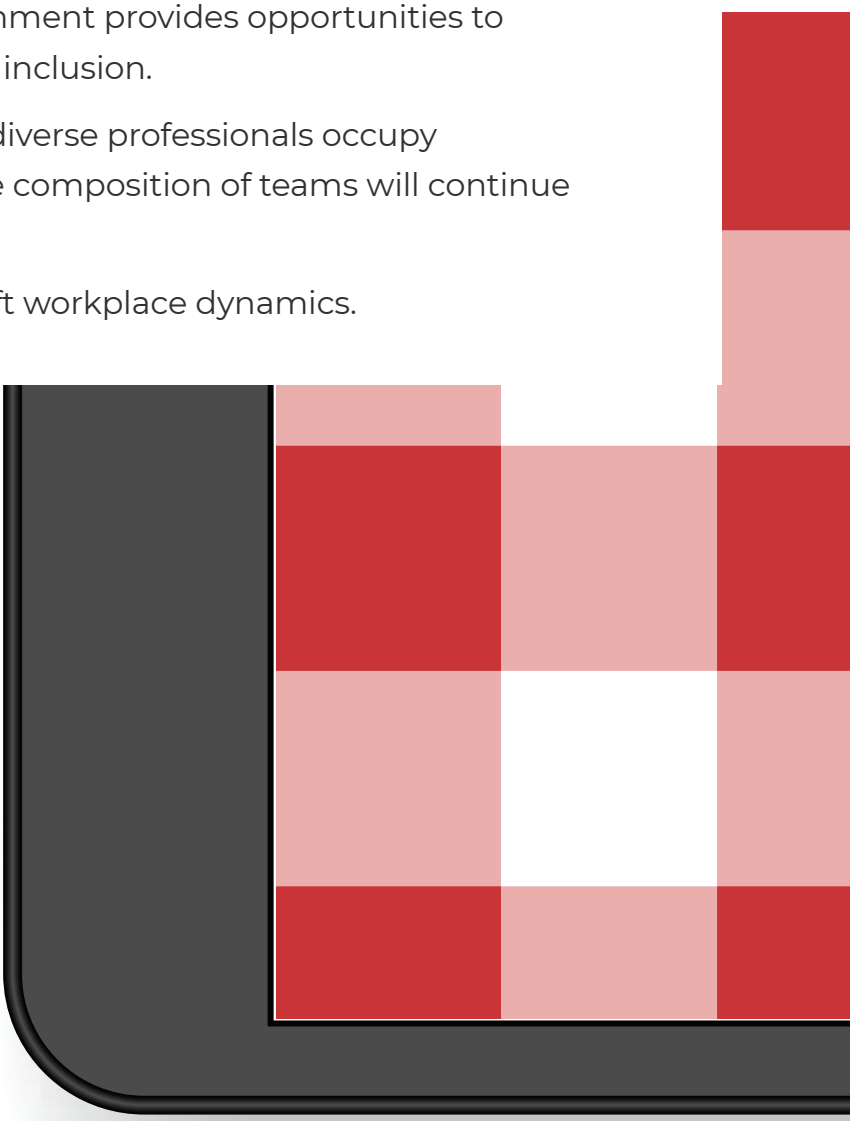
- For professionals who have difficulty reviewing documents on a monitor compared to seeing them on paper, simply using a monitor that rotates to portrait mode might be a game-changer.
- Every employee in a law firm should have a laptop with a docking station to give each individual the freedom to work remotely, while giving the firm the ability to consistently secure those devices.
- Systematizing your practice with better technology and improved processes can give you a competitive advantage.

"Working from home has made every lawyer previously dependent on others more self-reliant."





Embracing Diversity and Inclusion

- Diversity and inclusion is now a top-five, if not the top, issue at many organizations.
 - Remote work may create more opportunities for diverse candidates.
 - A remote work environment provides opportunities to promote diversity and inclusion.
 - As more women and diverse professionals occupy positions of power, the composition of teams will continue to change.
 - Remote work may shift workplace dynamics.
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GUEST SPOTLIGHT

PAULA EDGAR

CEO, PGE CONSULTING GROUP LLC

- Silence is seen as apathy and disengagement.
- Use words to say what you mean and then support statements with impactful actions.
- Work on identifying issues (conducting assessments) before developing a strategy.
- Conversations need to be about action, allyship, awareness, and accountability.
- We all need to commit to doing better and continuing to try to understand.
- Efforts to catalyze conversations about diversity can be positive when done thoughtfully and with guidance.
- Growth begins where comfort ends and this is uncomfortable stuff.
- We should be catalysts for good and that starts with learning about the experiences and issues that impact underrepresented groups.

"To address diversity and inclusion, acknowledge, reflect, atone, strategize, and strive to do better."

GUEST SPOTLIGHT

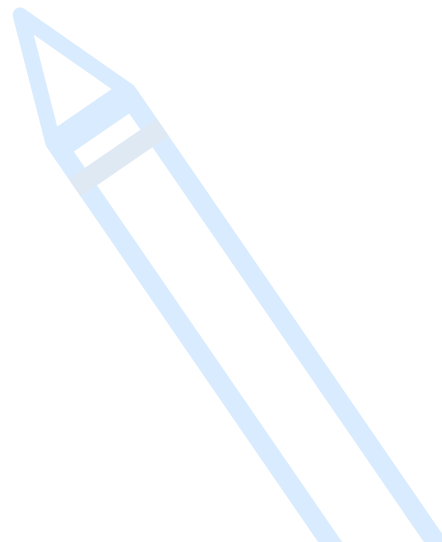
HAL BIAGAS

FORMER EXECUTIVE DIRECTOR, NALCS PLAYERS ASSOCIATION
(LEAGUE OF LEGENDS)



- Hundreds of colleges and universities across America have competitive gaming teams and offer significant scholarships to prospective players.
- Athletes have a voice, a platform, and an ability to influence others.
- Athletes, through their actions, can often force people to confront and react to existing racial, gender, societal, and diversity issues.
- Athletes are driving greater change as they become more cognizant that they hold the power to do so.

"Sports has often had a leading role in creating societal change."





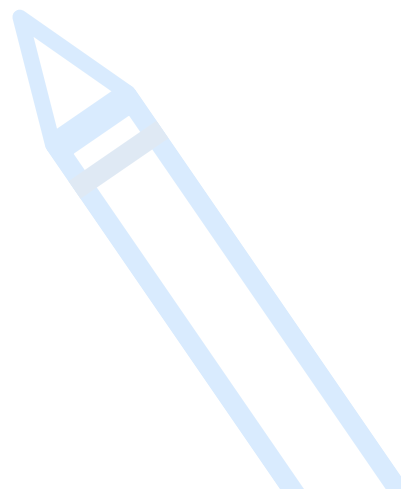
GUEST SPOTLIGHT

DANA DENIS-SMITH

FOUNDER, OBELISK SUPPORT

- Unless we see a real reinvention of the law firm framework within which people support clients, then you'll have very little room for new types of lawyers.
- I like seeing people being given responsibility and rising to it.
- Not being afraid to be redundant is also quite a good perspective.

"The pandemic impacted women who work in the legal profession across the board and there is concern that the drive for diversity and equality could suffer a setback."





GUEST SPOTLIGHT


PHYLLIS HARRIS

GENERAL COUNSEL AND CHIEF COMPLIANCE AND ETHICS OFFICER, AMERICAN RED CROSS

- Show me that you are actively going to places where you can recruit professionals of color.
- We have a lot of attorneys of color who flounder in their first two years because they are not given meaningful work or opportunities, and I find that there is resistance to or anxiety about giving good feedback.
- To be a great general counsel, you have to know the business.
- Giving and getting feedback matters.
- There is a distinction between mentors and sponsors.
- A sponsor actively advocates on your behalf.
- Transparency builds trust.
- If you want to add value, you have to serve people.

"When you see that things are not equitable, speak up and do the right thing. "

Concentrating on Career Development

- We are all perpetually in the job market.
 - Tell your own story and ensure your supervisors hear it.
 - Career progression is all about getting the right sponsors.
 - Anything can happen, so we need to reimagine what our jobs are without the fear of reconsidering what we are capable of.
 - Incremental change will drive the highest level of reinvention.
 - The ability to see the big picture is the gateway to opportunity.
 - "Try me out" efforts at your existing organization can be beneficial to shifting your role.
 - Write down the things your supervisor does not see on a regular basis and share them.
 - The word "pivot" can have positive and negative connotations.
 - The keys to thriving in this environment are to adapt and remain resilient.
 - When switching jobs, be transparent and respectful.
 - It is critical for you to understand your value in the job market.
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GUEST SPOTLIGHT

IDA ABBOTT

FOUNDER, IDA ABBOTT CONSULTING, AUTHOR, *THE LAWYER'S GUIDE TO MENTORING AND SPONSORING WOMEN*

- Mentoring is unique because it is a learning process based on a mutual relationship.
- Lawyers often don't know how to listen.
- The skills you use as a mentor can also make you a better lawyer for clients.
- The pandemic is a traumatic period for many lawyers.
- The people who are happy about retirement are those who are moving toward something.
- Today, we should start thinking about retirement the day we get our first job.
- People's greatest fear about retirement is outliving their savings.

"We undervalue the importance of curiosity."



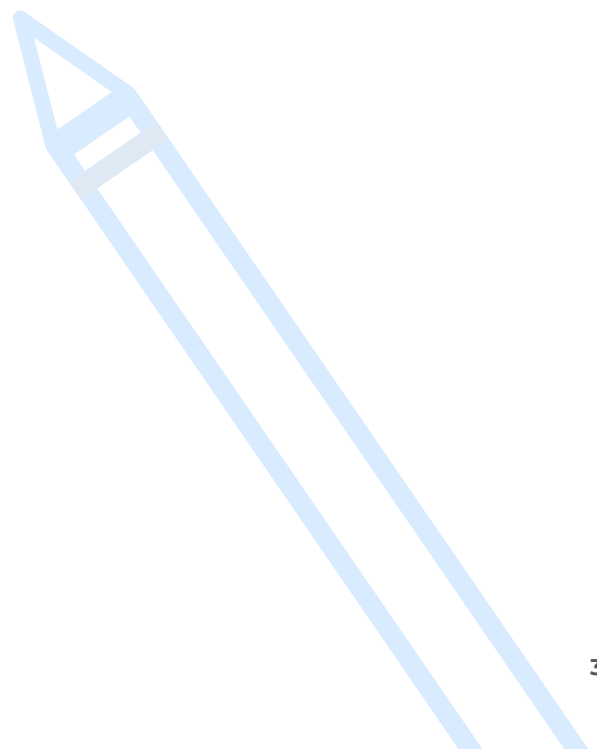
GUEST SPOTLIGHT

JARED COSEGLIA

FOUNDER AND CEO, TRU STAFFING PARTNERS INC.

- Full-time hiring in privacy and information governance has been the fastest to come back.
- If you're a software provider, my advice is to offer a certification program and to give it away for free.
- In the legal profession, you are as good as what you sell and what you sell is transferable.

"The transient nature of law firms and service providers has made the individual king."





GUEST SPOTLIGHT

AMANDA ELLIS CUBAN

FOUNDER, ACE LEGAL SEARCH

- There are so many social media groups that give you the chance to connect with other people who share your passions and interests.
- Start using social media by listening and observing what others are sharing.
- Know your purpose in leveraging particular networking platforms and consider expanding beyond your circle or industry.

"What success looks like will be dramatically different following the pandemic than it was after the financial crisis because new career opportunities are likely to emerge."



GUEST SPOTLIGHT

JONATHAN GREENBLATT

CHAIRMAN AND CO-FOUNDER, LEGAL INNOVATORS

- Pressures on productivity are forcing some firms to sacrifice mentoring.
- We live in incredibly volatile markets and hiring a year or two in advance is not always logical for law firms.
- You don't know where your career will lead so you need to be incredibly open-minded.
- You cannot sit and wait for opportunities.
- Most people are flattered to mentor a younger professional, but they need a signal to do so and the individual seeking mentoring must send that signal.

"Serendipity often drives your career."

GUEST SPOTLIGHT

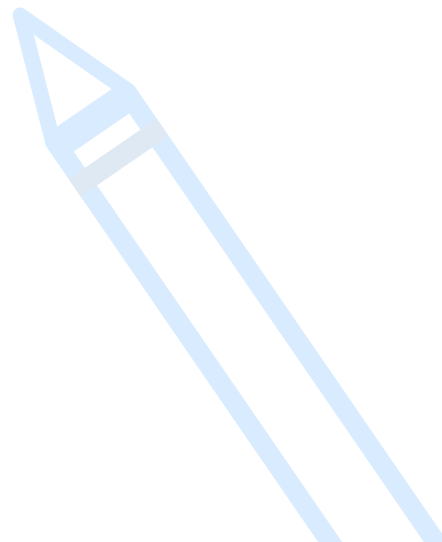
**PRIYA LELE, CHRISTIE GUIMOND,
AND NICKY LEIJTENS**

CO-FOUNDERS, SHE BREAKS THE LAW



- Don't think of your career as a ladder; think of it as a jungle gym.
- Equality has to start at home.
- It is like we are all in the same storm, but are in different boats when it comes to working from home.
- The biggest challenge for innovation has always been to get people to buy into the need for change and while awful, the pandemic has been an embarrassment of riches for innovators who are driving change.

"We need to lift each other up so that we all rise together."



Expressing Gratitude

- Everyone needs to be appreciated and valued.
- It is important to express gratitude for the hard work and dedication of your peers.
- You can never thank your employees enough.
- Write thank you cards to your mentors.



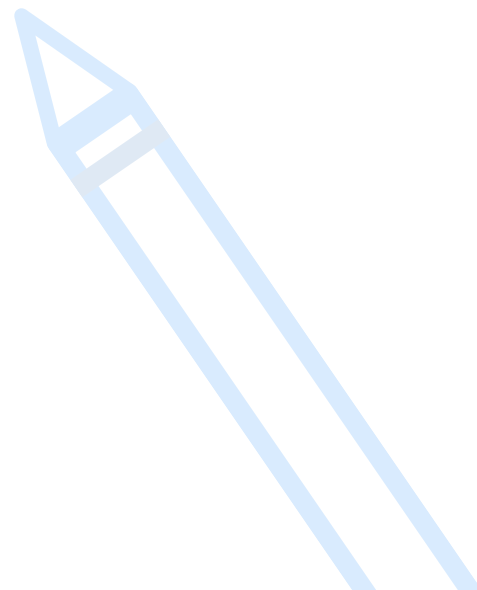
GUEST SPOTLIGHT

COLIN LEVY

FORMER LEGAL COUNSEL, LOOKOUT

- What you put out into the universe is what you get back.
- Trust the job search process and rely on your support system during the down moments.
- You need to maintain a resilient mindset when seeking a new role.
- There is a tendency to be overwhelmed by desperation in the current environment, so it is critical to remain patient.
- Be open to potential opportunities.

"Focus on what you can help others learn through your experience."



Promoting Your Work

- There is a distinction between selling and offering value.
- Align values with needs.
- Sales and marketing tend to get lumped together.
- There is a big difference between leads and sales.
- Do-it-yourself video could serve to showcase your authenticity.
- Focus on selling business outcomes that enable clients to better serve their customers.
- Over the next year, we will see an increase in spending on marketing and technology.
- Teams can convert marketing into sales through brand awareness.



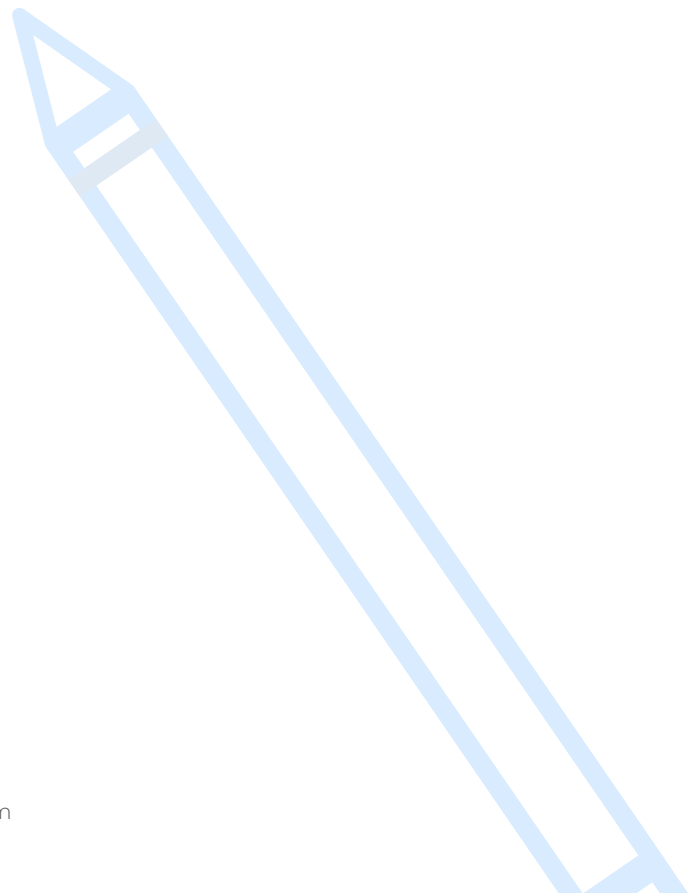
GUEST SPOTLIGHT

ZACH WARREN

EDITOR-IN-CHIEF, LEGALTECH NEWS, ALM MEDIA

- Unique ideas are appealing to legal tech reporters.
- Vetting and evaluating PR claims is critical, so be prepared to answer difficult questions about your technology.

"Be creative in approaching the legal tech media."



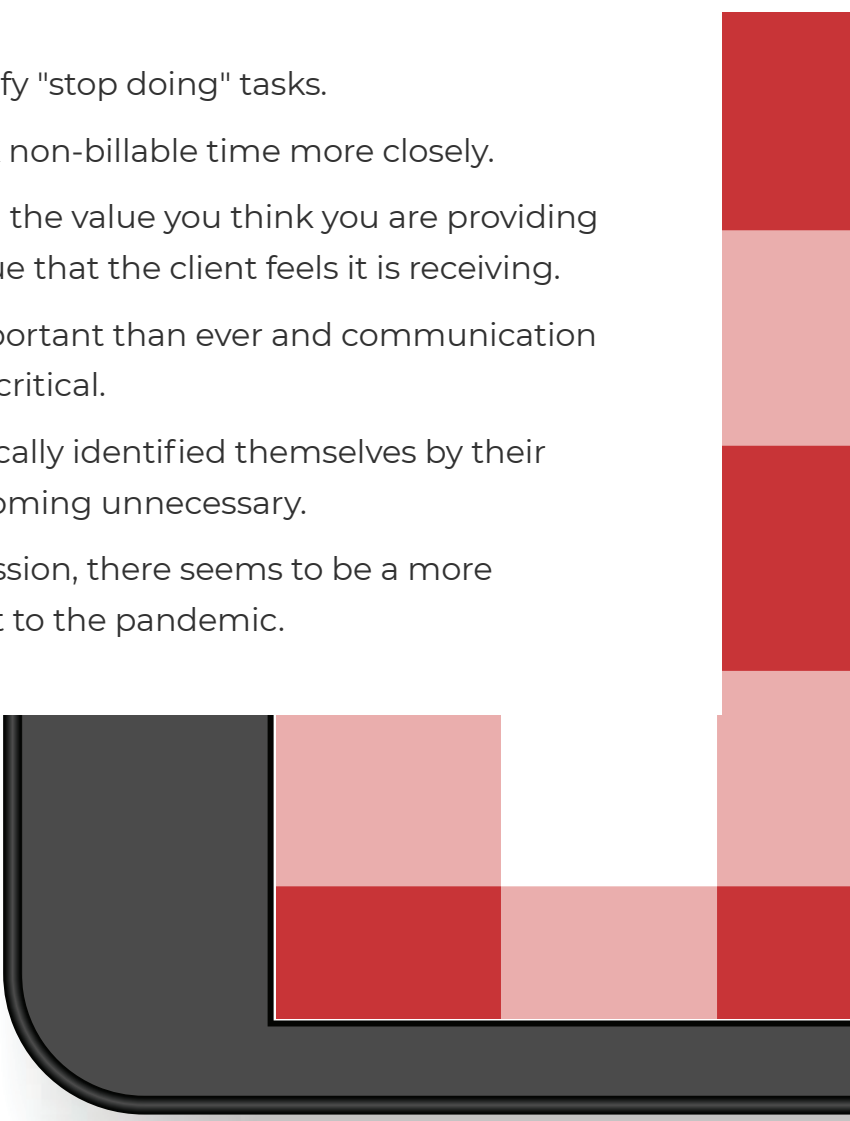
EVOLUTION OF THE LEGAL PROFESSION

The entire Virtual Lunch community contributes to the legal profession in some way, so it was natural for our discussions to produce ideas about how the practice was changing, which professionals were driving those changes, such as leaders in legal operations, and what the next generation would need to learn in law school to prepare for the post-pandemic era.



TRANSFORMING THE PRACTICE OF LAW
UNDERSTANDING LEGAL OPERATIONS
LOOKING AT LEGAL EDUCATION

Transforming the Practice of Law

- Pressure is increasing to change traditional business models.
 - We may see more lawyers becoming independent contractors.
 - Legal employment is experiencing the calm before the storm.
 - We are trying to identify "stop doing" tasks.
 - It is important to track non-billable time more closely.
 - There is a difference in the value you think you are providing to a client and the value that the client feels it is receiving.
 - Value-add is more important than ever and communication of that added value is critical.
 - Law firms have historically identified themselves by their offices, which are becoming unnecessary.
 - Unlike the Great Recession, there seems to be a more emotional component to the pandemic.
- 



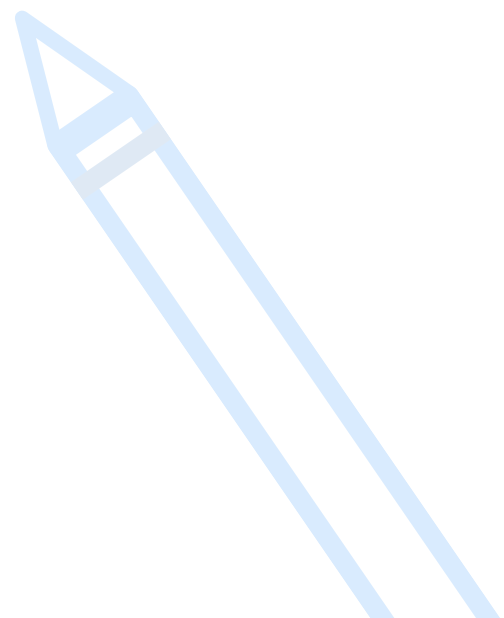
GUEST SPOTLIGHT

BOB AMBROGI

LEGAL JOURNALIST

- Legal education is one of the areas that has been most exposed for its shortcomings as a result of this crisis.
- I believe that the technological advances we are making and the reforms we are talking about are all directed toward improving how our system serves the people that we are supposed to be helping, many of whom aren't clients because they can't get access to legal services.

"Maybe now courts will realize that they need to be more agile and operate a little more like tech companies."





GUEST SPOTLIGHT

EDWARD STEINBERG

PRESIDENT, NEW YORK STATE TRIAL LAWYERS ASSOCIATION,
AND CO-FOUNDER, LEAV & STEINBERG

- I don't think anyone would want to eliminate prospective jurors simply because they don't have adequate technology.
- The court system is mindful that safety has to come first.
- Many of the conversations about virtual trials have always centered on the concern around the inability to develop a one-on-one connection through eye contact.
- A jury trial with proper social distancing in reconfigured courts or locations properly suited for trials should be the major focus of the court system.
- In some instances, the technology that has now been introduced does not meet the physical infrastructure of the courthouses.

"A court reconfiguration process is a likely immediate change from the pandemic, along with virtual court conferences, motions, and mediations."



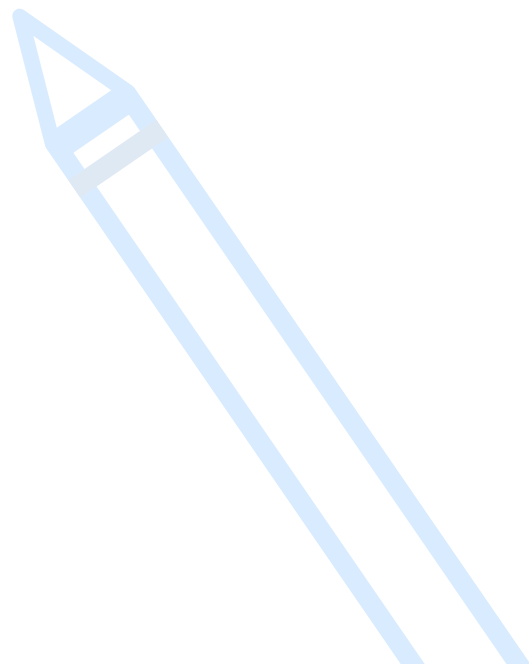
GUEST SPOTLIGHT

JEFF CARR

FORMER GENERAL COUNSEL

- We have to keep in mind that law is nothing but a service industry and we exist for our customers.
- We're not serving our customers anymore because both our litigation and legal delivery platforms are largely broken and too expensive.
- Businesses avoid litigation wherever they can and find private ways to resolve disputes.

"If the cost of justice is too expensive or too inaccessible, businesses will find another way."





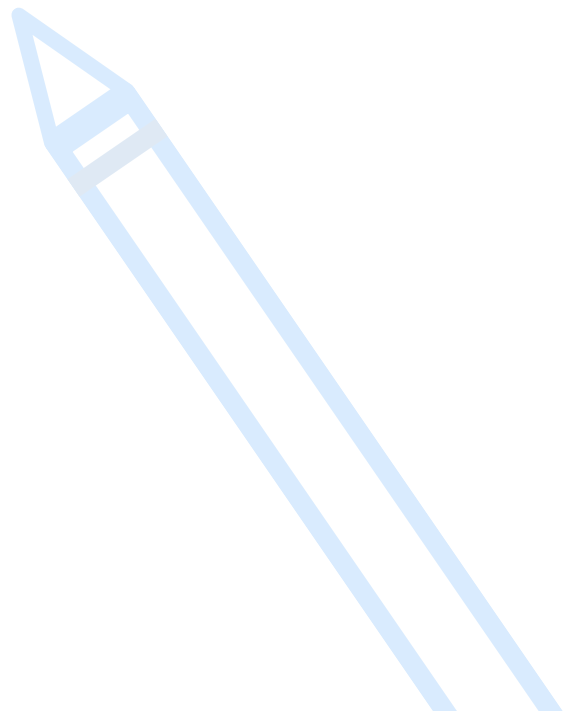
GUEST SPOTLIGHT

ERIC ELFMAN

FOUNDER AND CEO, ONIT

- Lawyers are process, not project, managers.
- When deciding whether to build or buy, be honest with your capabilities.
- The enterprise software market is ripe for disruption.
- Legal departments recognize the need for workflow tools.

"In challenging markets, strong companies get stronger and weak companies get weaker."





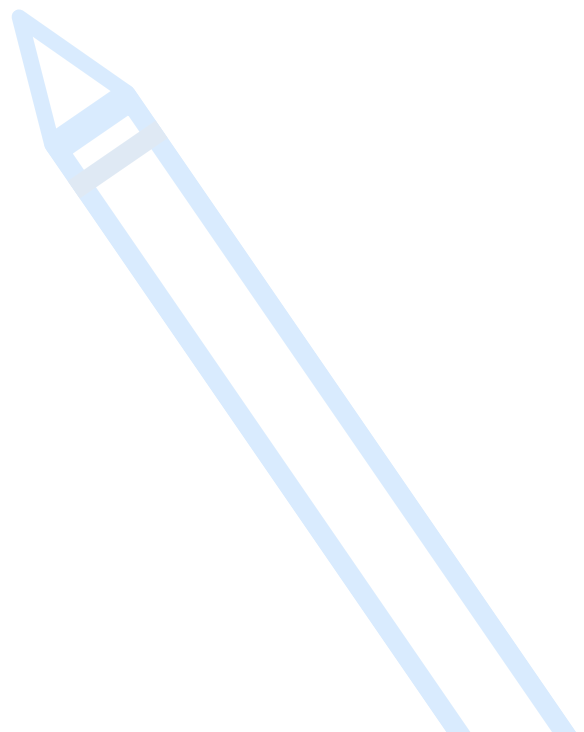
GUEST SPOTLIGHT

JORDAN FURLONG

FOUNDER, LAW21, AUTHOR, *LAW IS A BUYER'S MARKET: BUILDING A CLIENT-FIRST LAW FIRM*

- The pandemic has made remote connections and proceedings a permanent feature of the legal sector.
- Professional identity should be a mandatory course in law school.

"The last vaccination for COVID-19 will not be the end of the impact of the pandemic on the delivery of legal services."





GUEST SPOTLIGHT

BILL HENDERSON

PROFESSOR AND STEPHEN F. BURNS CHAIR ON THE LEGAL PROFESSION, INDIANA UNIVERSITY MAURER SCHOOL OF LAW

- Now is not a time to sell innovation to law schools. You have to sell a solution.
- I see paralegals as allied professionals and recognize the value that they bring. We must be inclusive and make them part of the team.
- I would be willing to go all-in on legal professionals, as long as the legal profession is not limited to lawyers.

"If you're smart and motivated, there is a place for you in the legal industry. It has nothing to do with pedigree, it has to do with skills."



GUEST SPOTLIGHT

CAT MOON

DIRECTOR OF INNOVATION DESIGN AND LECTURER IN LAW,
VANDERBILT UNIVERSITY LAW SCHOOL

- I define innovation simply as change that creates value.
- Absolutely amazing progress can happen when you aggregate small and incremental change by bringing people together who are interested in making things better, wherever they are on the spectrum of law.
- We amplify each other when we can come together in really combined efforts.
- When you get a group of diverse problem solvers together around the table, you get to the solution more quickly.
- Foundational to true innovation and making law better, you must have mindsets and a culture in place that supports them.

***"You can be innovative,
no matter where you are
or what you're doing."***



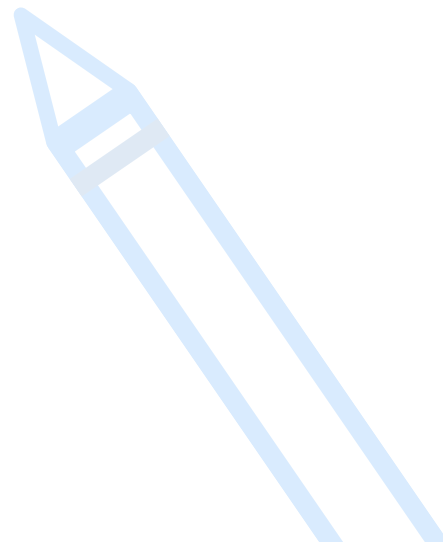
GUEST SPOTLIGHT

DR. LARRY RICHARD

FOUNDER AND PRINCIPAL CONSULTANT, LAWYERBRAIN

- There are a lot of roles for lawyers that are relationship-focused, which does not necessarily play to their strengths.
- Millennials have a dramatically lower score in empathy, which is not unique to the legal profession.
- Leaders persuade others to follow them through relationships.
- Empathy is critical to getting and retaining clients, and is a personality trait you can learn to enhance.
- Law firms are under enormous pressure today to change their business models.

"The need for leadership is greater now than it has ever been."





GUEST SPOTLIGHT

RICHARD ROGERS

EXECUTIVE DIRECTOR, CIVIL RESOLUTION TRIBUNAL

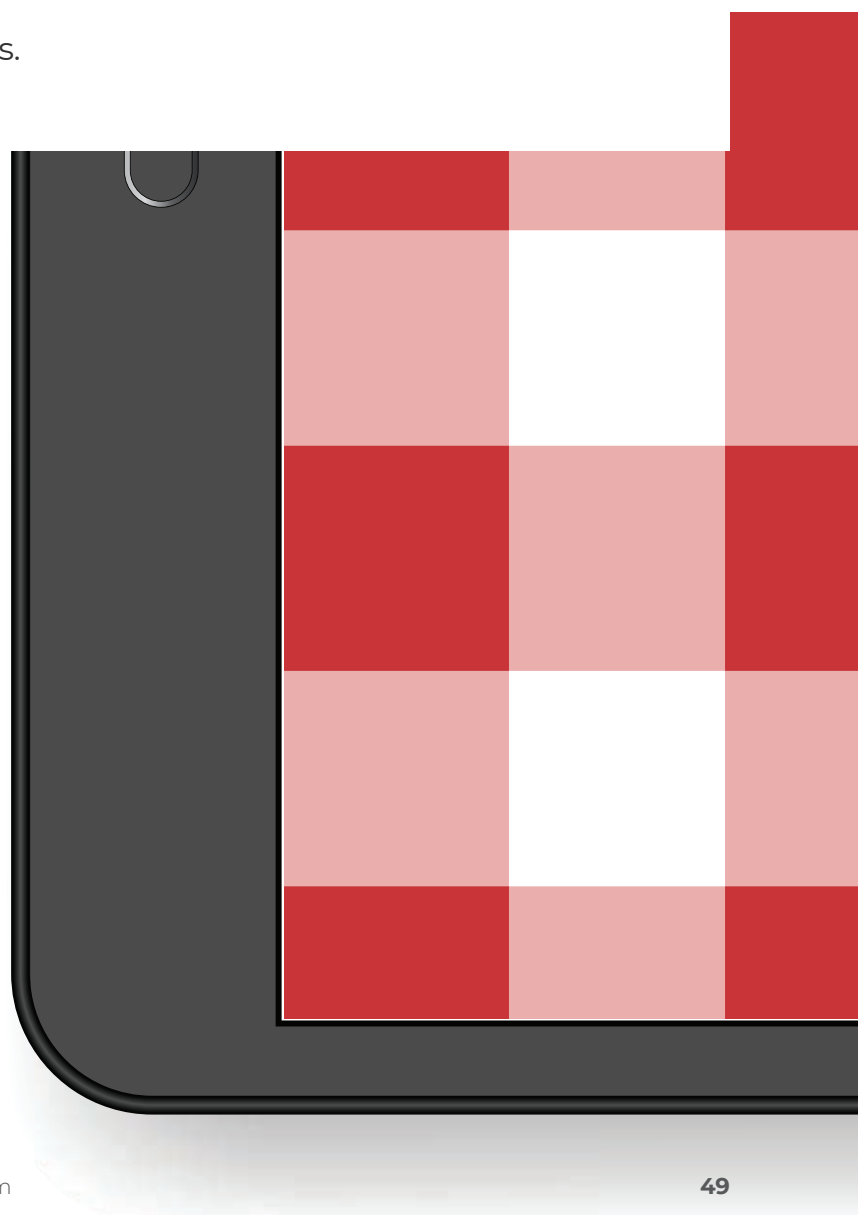
- Resist the urge to automate early and wait until you really understand how others will use your platform.
- While we're probably still a very small player in the broad justice system in British Columbia, other players in the sector are looking at us seriously because we continued to operate despite COVID-19 and have a requirement that users engage with our expert system before leveraging the formal tribunal process.

"It is an access to justice initiative to provide litigants with some level of understanding of the law related to their legal issues."



Understanding Legal Operations

- Change depends on the tone from the top.
- Requirements gathering is essential.
- Contract automation is a key priority for legal departments.
- Start innovation conversations with curmudgeons.
- Solve the unhappiness.





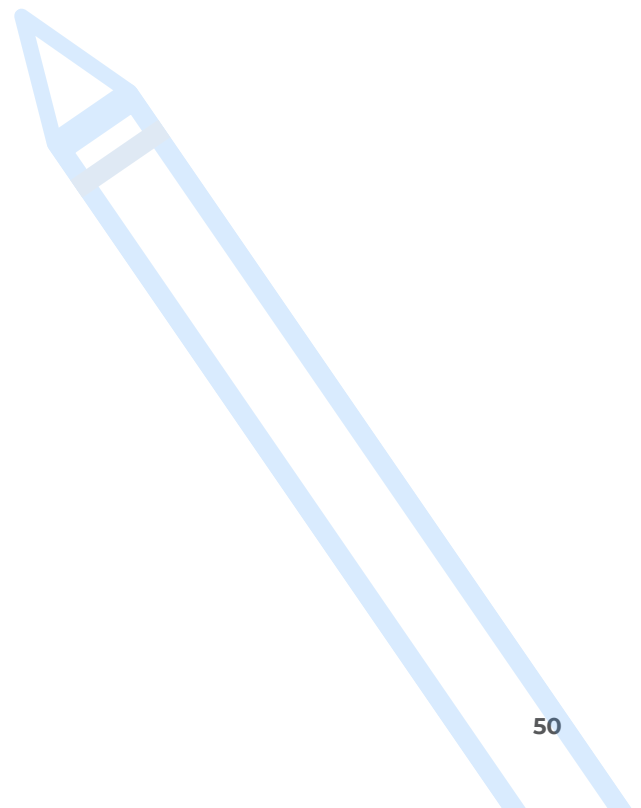
GUEST SPOTLIGHT

GREGG MCCONNELL

LEGAL OPERATIONS LEADER, CORTEVA AGRISCIENCE

- The legal operations leader is often the translator between legal and IT.
- Legal operations have become more technology-centric.
- Focus on improving without technology and then apply a tool to enhance that improvement.
- Process mapping can empower a law department.

"Don't ask about innovation, ask about pain."





GUEST SPOTLIGHT

JENNIFER MCCARRON

DIRECTOR OF LEGAL OPERATIONS & TECHNOLOGY
NETFLIX

- Finding the job or the career you want comes about by crossing off all the ones you've tried, failed at, and loved. Then, it is just a matter of knowing what you're good at, what comes naturally, and what brings you joy.
- Some of the most creative people I know are those who combine the skills of a product manager with those of a designer because that's just art with code.
- Career success is a matter of knowing what you're good at and then having the humility to know what you're not good at.
- Staying ultra-flexible, adaptable, and on the brink of your comfort zone will keep your work fresh and allow you to thrive in different environments.

"Know your strengths, recognize your limits, and ask for help when you don't have the answer."



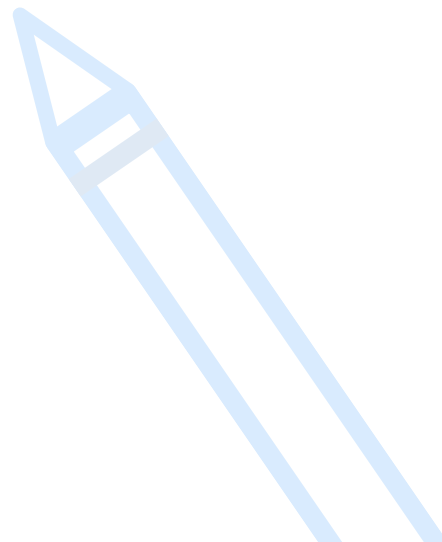
GUEST SPOTLIGHT

CURTIS BATTERTON

LEGAL OPERATIONS AND GLOBAL TECHNOLOGY
MANAGER, MCDONALD'S

- Surround yourself with colleagues who can identify your blind spots.
- The pandemic has accelerated the deployment of technology.
- There is now a heightened focus on diversity and inclusion.
- Evaluate the total cost of technology ownership.
- People experience change as pain.
- Value long-term relationships over short-term solutions.

"The legal operations sector has evolved from fixing what is broken to investing in the future."



Looking at Legal Education

- As soon as students realize that they know more than they think, they will become more enthusiastic learners.
- Bite-sized lessons are valuable in a remote environment.
- We have learned what is important to do in-person and what is equally effective remote.



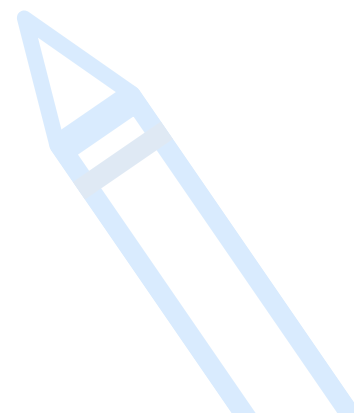
GUEST SPOTLIGHT

DAN RODRIGUEZ

HAROLD WASHINGTON PROFESSOR AND DEAN EMERITUS,
NORTHWESTERN UNIVERSITY SCHOOL OF LAW

- We need to give students the best virtual educational experience possible and should think creatively about how to do so.
- There is a very good case to be made for modifying what schools are charging students in appreciation for the educational limitations of learning online.
- The reality is that some law schools face an existential challenge if students, including LLM candidates from abroad, cannot attend in person.

"There has not been a strong drive to change legal education because as long as employers hire in the same way, law schools will not change."





GUEST SPOTLIGHT

GABRIEL TENINBAUM

ASSISTANT DEAN OF INNOVATION, STRATEGIC INITIATIVES
& DISTANCE EDUCATION, SUFFOLK UNIVERSITY LAW SCHOOL

- Law school is about inculturation in the first year to gain a basic understanding and then the hope is to move away from doctrinal toward experience-based learning.
- A legal solutions architect is a desirable position.
- Many students are not coming out of law schools with the skills they will need to progress in the legal profession.

"Law students must understand doctrinal skills, interpersonal skills, and tech/innovation-related developments to succeed."



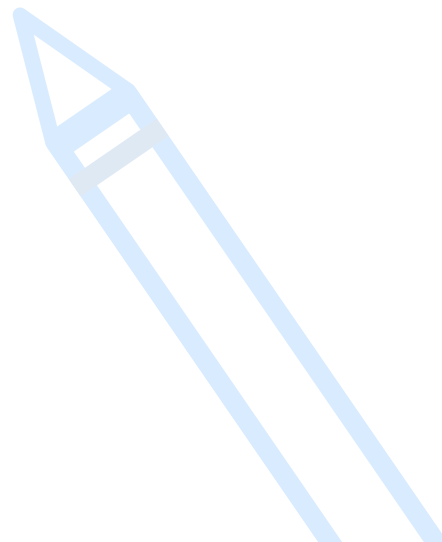
GUEST SPOTLIGHT

JEFF WARD

DIRECTOR, DUKE CENTER ON LAW & TECHNOLOGY

- One can use enthusiasm to make up for ignorance.
- Law students are excited when they see the possibilities that technology offers to improve the practice of law.
- We have socio-technical systems that need many talented people to thrive.
- Young professionals can create career opportunities when they are technologically adept.
- Client demands are driving technological change, as well as racial and gender equity.
- The pandemic is fueling the digital transformation of legal departments and law firms.

"Technology success is attitudinal more than aptitudinal."



TECHNOLOGY

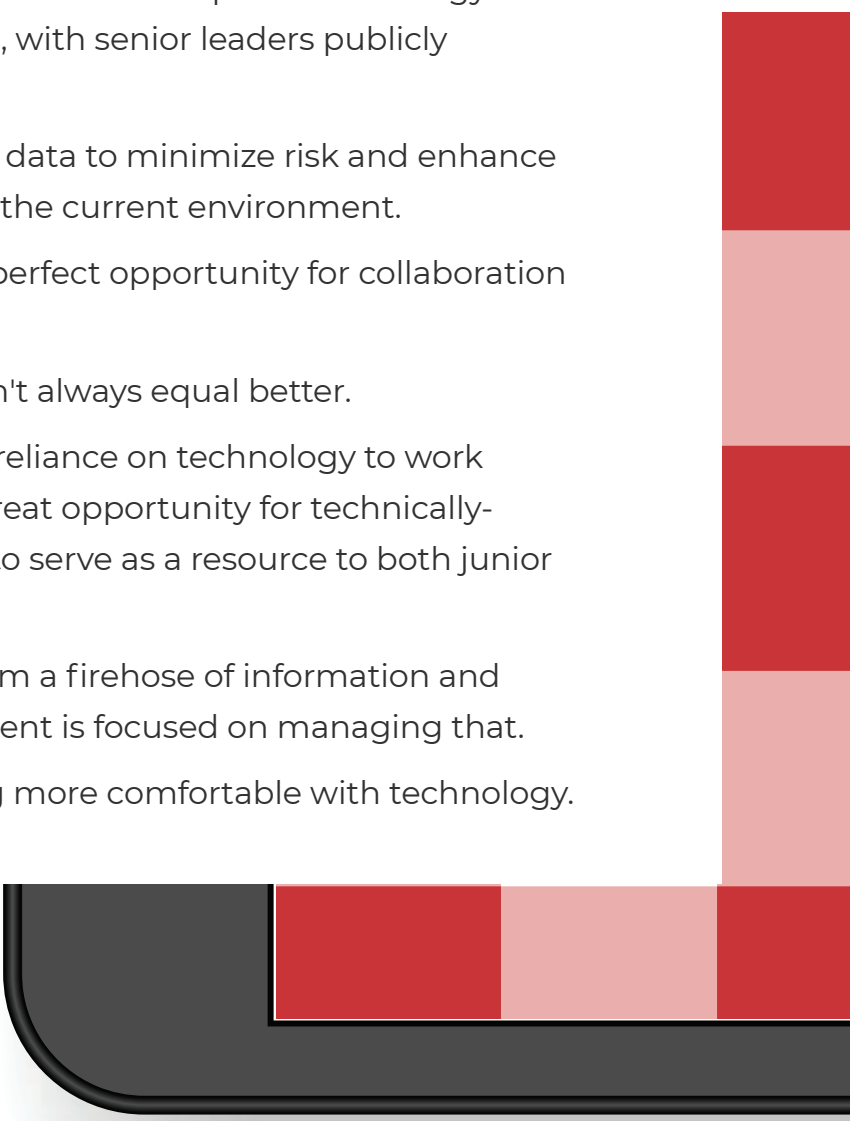
Given our reliance on remote communication, almost all of our conversations referenced the impact of legal technology, how initiatives focused on innovation were driving practical and positive change, and the promise of new developments, including artificial intelligence.



**MAXIMIZING THE VALUE OF
TECHNOLOGY AND INNOVATION**
RECOGNIZING THE PROMISE OF ARTIFICIAL INTELLIGENCE



Maximizing the Value of Legal Technology and Innovation

- Technology adoption is the gateway to innovation.
 - The need to adapt is critical.
 - Organizations need to set the example of technology adoption from the top, with senior leaders publicly embracing key tools.
 - It is critical to leverage data to minimize risk and enhance business continuity in the current environment.
 - This period offers the perfect opportunity for collaboration tools and portals.
 - Faster and remote don't always equal better.
 - This period of intense reliance on technology to work remotely presents a great opportunity for technically-proficient individuals to serve as a resource to both junior and senior peers.
 - We are all drinking from a firehose of information and knowledge management is focused on managing that.
 - Lawyers are becoming more comfortable with technology.
- 



GUEST SPOTLIGHT

RAYMOND BLIJD

CEO, LEGALCOMPLEX

- When a company receives a large amount of funding, it may reveal more about the state of the sector than the recipient since it usually signals the end of a growth cycle rather than the start of one.
- From an investment standpoint, legal may be perceived as more stable and less volatile than other sectors.
- Legal tech has a passionate following that gives many solutions staying power.
- Companies may be repurposing their technology in 2021.

"Organizations and individuals define 'legal tech' differently."

GUEST SPOTLIGHT



MICHAEL GRUPP

CO-FOUNDER AND CEO, BRYTER

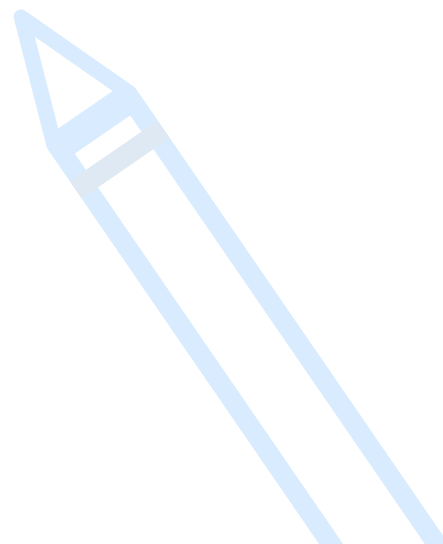
ALEXANDER IRSCHENBERGER

CO-FOUNDER AND FORMER CEO, ARCHII



- Adoption is tricky so start the process with a legal design mindset and recognize that you need patience.
- Some firms have transferred their event and travel budgets into legal tech.
- Law firms have a sincere, vested interest in utilizing the technology that they already have and are reallocating funds in meaningful ways.

"The pandemic has elevated those in professional roles within law firms and law departments."





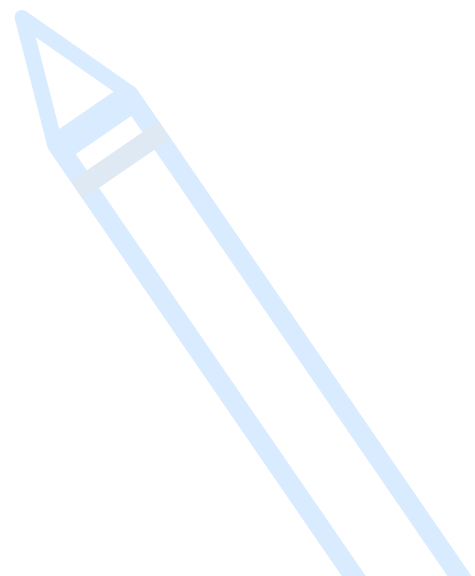
GUEST SPOTLIGHT

MAYA MARKOVICH

CHIEF GROWTH OFFICER, NEXTLAW LABS

- Early buy-in from a diverse set of stakeholders is important to ensure that new initiatives are successful.
- If you don't have early buy-in, people don't feel invested.
- You need a champion and leadership sign-off.
- Legal tech developers must understand the procurement and sales cycle in law firms.
- This is a great time to introduce new technology and can help adoption.

"Understanding the value of diverse viewpoints and seeking them out is critical."





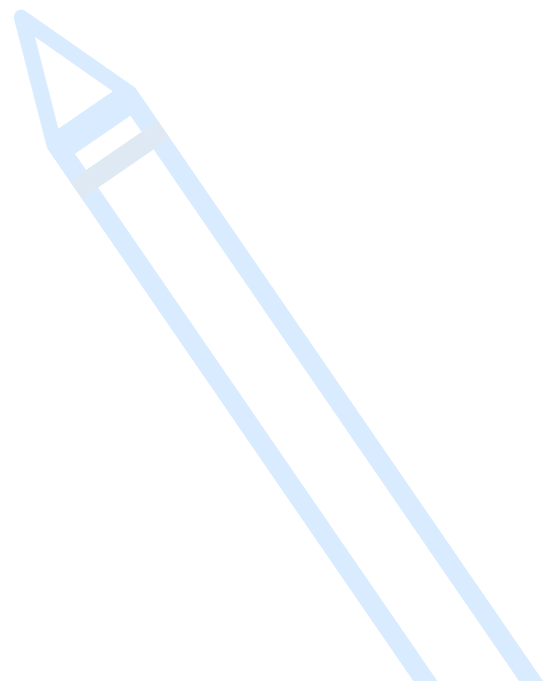
GUEST SPOTLIGHT

SCOTT RECHTSCHAFFEN

CHIEF KNOWLEDGE OFFICER, LITTLER MENDELSON

- It can be challenging to advocate for innovation in legal because attorneys perceive that efficiency may result in fewer billable hours — that's a short-sighted view.
- We need to involve the people doing the work in driving innovation; they know where the inefficiencies are.
- Trust is critical when innovating.
- Professionals need technology that mirrors the simplicity of the tech they use in their personal lives.

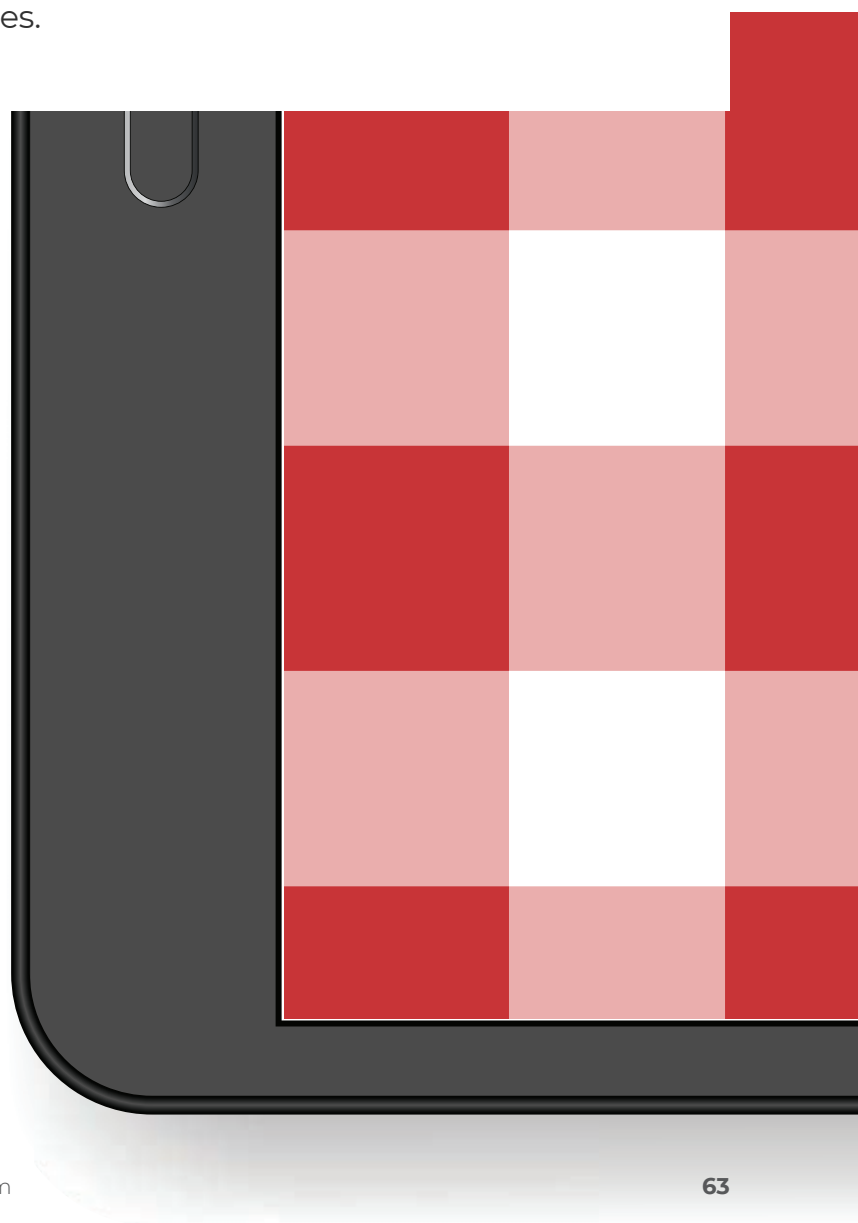
"Innovation is a collective endeavor."





Recognizing the Promise of Artificial Intelligence

- AI requires a 15- to 20-year vision.
- Craft an AI narrative to which people can relate.
- Driving enterprise-level change could take five to seven years given the necessary cultural shifts and infrastructure upgrades.





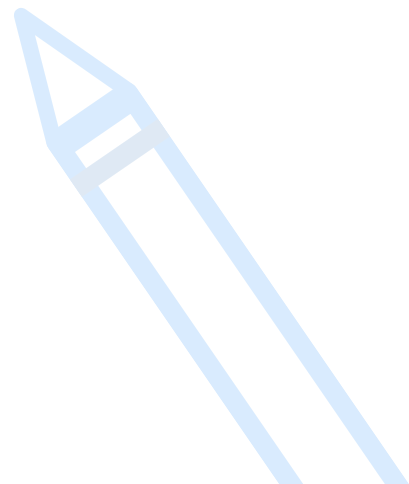
GUEST SPOTLIGHT

NEIL SAHOTA

CHIEF INNOVATION OFFICER, UNIVERSITY OF CALIFORNIA, IRVINE SCHOOL OF LAW, AND UNITED NATIONS AI ADVISOR

- People cannot yet wrap their heads around how to use AI.
- The most successful AI ventures have come from domain experts.
- You need to solve a pain point.
- Clients are driving law firms toward fixed pricing and greater efficiency in general.
- Younger law firms are starting to realize that if they don't adapt, their businesses will fail.
- When you bring an AI initiative to a firm, you are spreading the cost among the partners, which is easier at a large firm than it is at a mid-sized or a small firm.

"There is a need for diversity and inclusion in training AI systems."





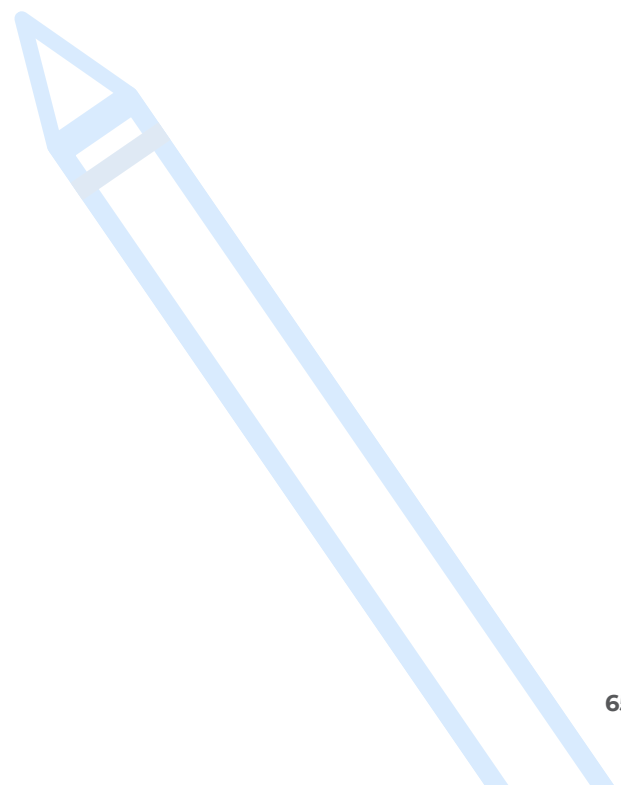
GUEST SPOTLIGHT

NOAH WAISBERG

CO-FOUNDER AND CEO, KIRA SYSTEMS

- You don't have a choice about using AI as a lawyer because your competitors are using it and you need to appreciate that reality.
- Just because AI helps perform individual tasks more efficiently does not mean there will be no need for lawyers.
- The relevant skills you need to learn as a junior lawyer today are different than they were 20 years ago, including being able to process information produced by AI systems.

"AI is here to stay in legal."





GUEST SPOTLIGHT

NICK WHITEHOUSE

GENERAL MANAGER, ONIT AI CENTER OF EXCELLENCE

- You shouldn't worry about getting ahead of digital transformation because, eventually, it will pay off.
- Corporate legal departments are experiencing increased digital transformation activity.
- Drive new initiatives in an authentic manner.
- Law department success with AI is about storytelling and applying the benefits from other sectors or business units to legal.
- It is critical to avoid getting caught up in the hype around AI.

"Change management requires a journey toward building credibility."

LEADERSHIP



As we continued to consider the inability to plan beyond the short-term, we consistently discussed the power of leadership in this climate. We were so fortunate to have a broad array of individuals from around the world share their perspectives on helping organizations navigate this unprecedented period, with a particular dedication to empathy, commitment, and transparency.



LEADERSHIP LESSONS
ENTREPRENEURIAL EXPERIENCES



Leadership Lessons

- Aligning strategy, vision, mission, culture, and purpose makes a difference.
 - Firms need to follow the direction of their core values.
 - Firm management committees are likely trying to find ways to retain their employees.
 - Leaders need to enhance their emotional intelligence and listen differently.
 - Leaders need to enable more psychological safety.
 - When leading teams, you have to set the tone from the top.
 - Don't be shy in providing feedback, but make it specific and personal.
 - Focus on delivering feedback in a positive manner that builds people up and puts them in a position to be successful.
 - Create internal scorecards and executive summaries to highlight accomplishments.
 - It is important to demonstrate directed and individual empathy.
 - Remote working requires more micromanagement.
 - The level of trust in law firms may have increased during the pandemic.
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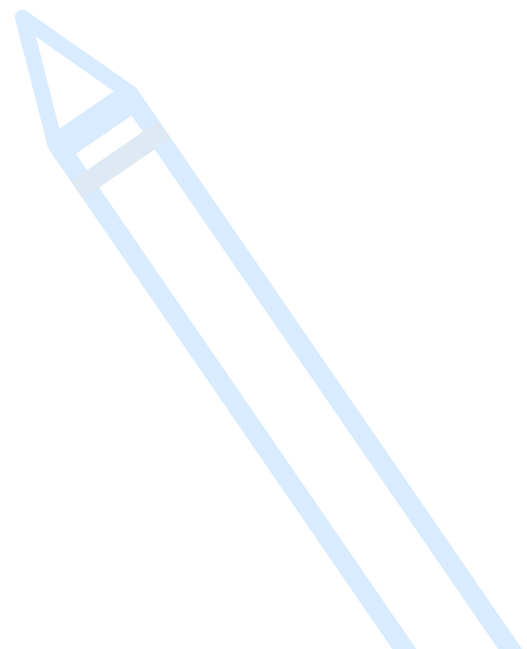
GUEST SPOTLIGHT

PATRICIA LEE REFO

PRESIDENT, AMERICAN BAR ASSOCIATION,
AND PARTNER, SNELL & WILMER

- All of the innovations around the practice of law are front and center for the ABA.
- The pandemic has taken a decade of change and squeezed it into a few months.
- Providing opportunities for law graduates is an extremely important objective.
- The pandemic has positively influenced technological competency.

"Every time our country has had a major crisis, lawyers have made a difference."





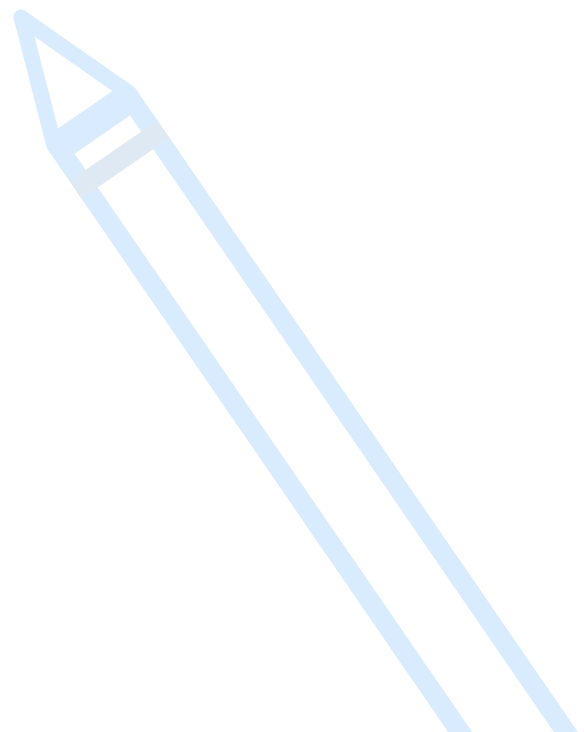
GUEST SPOTLIGHT

AVANEESH MARWAHA

CEO, LITERA

- It is important to bring in strong founders, who have been passionate and knowledgeable about their businesses.
- Avoid getting in the way of founders.
- When you bring people on board, you need to focus on empowering them.
- The earlier the stage of a product, the more you need to believe in the founder.
- You want to see resilience and grit in a founder.

***"Lead with laughter,
clarity, and empathy."***





GUEST SPOTLIGHT

JONATHAN REES

EXECUTIVE VICE PRESIDENT INTERNATIONAL, NUIX

- Collaborative interaction has increased at work.
- Strive to create virtual connections as effective as those made in a physical office.
- Supporting employee wellness is critical.
- Encourage employees to collectively contemplate new opportunities.
- Organizations need to rethink the office to promote collaboration.
- Being proactive is critical.
- A candid feedback loop is essential through a radical candour approach.

"There is an adventure inside people that is drawn out in conversation."



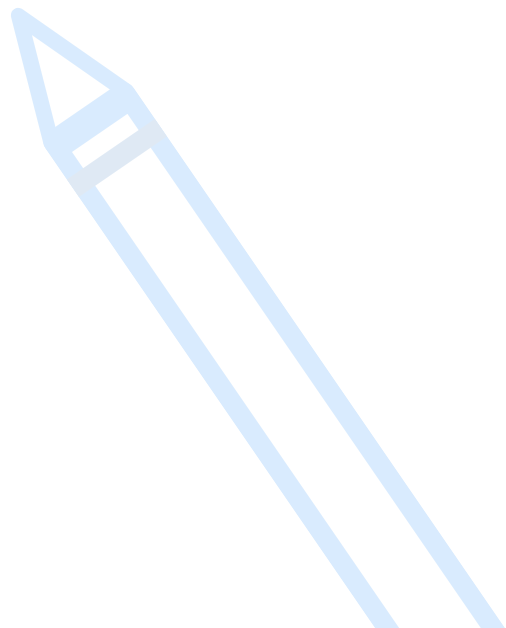
GUEST SPOTLIGHT

JOEY SEEBER

CEO, LEVEL LEGAL

- Silence is important in remote communication because it provides space to think.
- Leaders should always be thinking about removing any constraints associated with the continuity of their business.
- Leaders maintain a constant focus on innovating.
- People need a leader who will be honest with, encourage, and challenge them.

"Listening is a critical skill for leaders and empathy is closely related to listening."





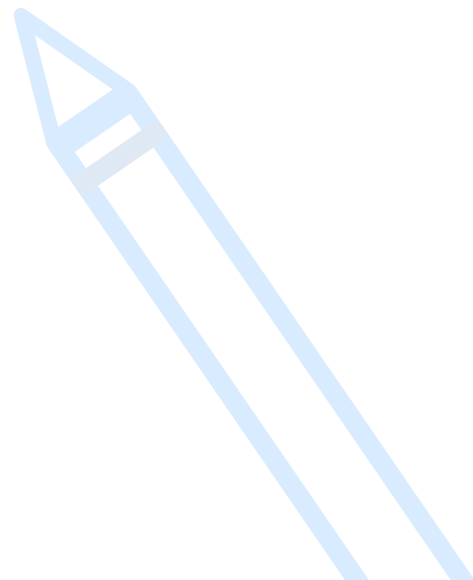
GUEST SPOTLIGHT

ETHAN TREEESE

EXECUTIVE VICE PRESIDENT AMERICAS, NUIX

- It has been a gift to learn more about each other in the pandemic.
- It is critical to focus on how to best serve clients and customers.
- Stronger relationships build trust and productivity.
- The smartest person in the room is the room.
- Corporate culture is like soup in that when you add someone to it, it changes.
- We need a broader commitment to diversity, inclusion, and equity.

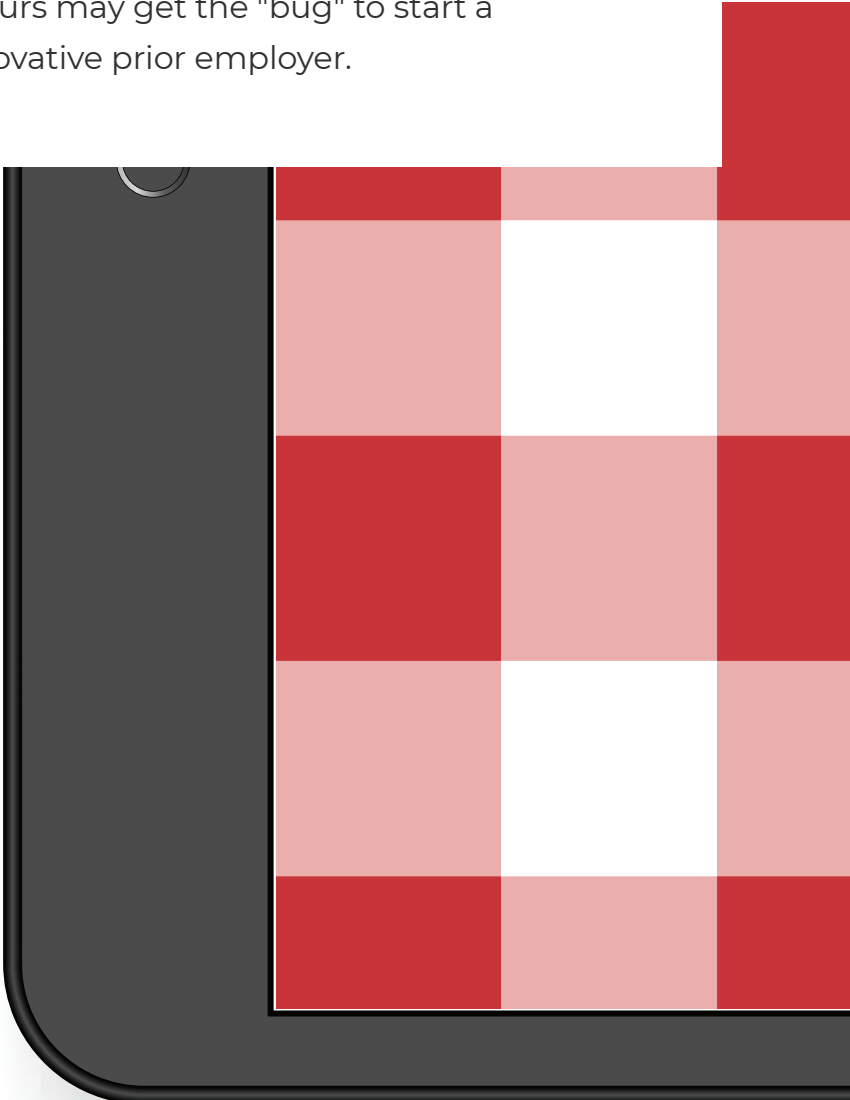
"Leaders should believe in the power of collective genius."





Entrepreneurial Experiences

- Legal tech startups can gain a competitive advantage from bundling technology and its implementation.
- Entrepreneurs should strive to build products that they would buy and use themselves.
- Legal tech entrepreneurs may get the "bug" to start a company from an innovative prior employer.





GUEST SPOTLIGHT

HALEY ALTMAN

GLOBAL HEAD OF CORPORATE DEVELOPMENT, LITERA

- People have to believe that entrepreneurs are passionate about what they are doing.
- You need to be able to craft a story for prospective investors.
- Find team members who fill gaps in skills.
- Try to engage prospects in low-cost pilots with defined success metrics to help users become invested.
- There are inflection points in a company's lifecycle that drive certain key decisions.

"Great leaders empower others to perform at a higher level."



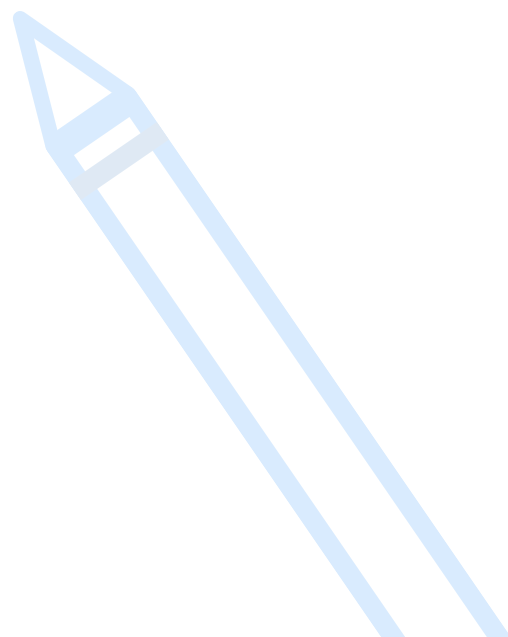
GUEST SPOTLIGHT

ALMA ASAY

EVANGELIST, LITERA

- When starting a company, you need to get out there, network, and connect.
- Entrepreneurs have to constantly be projecting success and confidence, which is hard.
- The increased number of knowledge management and innovation professionals are collecting feedback from lawyers, which is helping technology providers improve their tools more quickly and comprehensively.
- A real opportunity today is to learn about UX/UI to create interfaces with which lawyers will interact.

"The legal tech community has many more allies now."





GUEST SPOTLIGHT

JAY LEIB

FOUNDER, NEXLP AND EXECUTIVE VICE PRESIDENT
FOR INNOVATION & STRATEGY, REVEAL

- Keep in touch and network so that when you have an idea, there is a built-in infrastructure with which you can connect.
- Entrepreneurs need commitment and faith even when it is darkest, and it gets very dark sometimes.
- You have to be doing business development at all times.
- The best thing about sales from an entrepreneur's standpoint is that you learn how to take rejection.

"You need to have the courage to put yourself out there."



GUEST SPOTLIGHT

JEROEN PLINK

FORMER CEO, CLIFFORD CHANCE APPLIED SOLUTIONS

- Timing is everything. Avoid being ahead of time with your product. If you are trying to sell make sure that you align with the timing of the buyer.
- Some products that are seemingly boring infrastructure for a law firm, such as those for expense management, automated time capture, and data management, have the potential to make a major impact on the bottom line.
- Walk before you run. Get the basic technologies in place before you move into more complicated stuff.
- Tools that help clients deal with moving to a digital environment are very appealing right now.
- You can be a great lawyer, but that does not make you a skilled software product development leader or a talented software salesperson.
- There is huge potential for technology to drive change.

"Innovation is something you do not want to cut down on in tougher times."



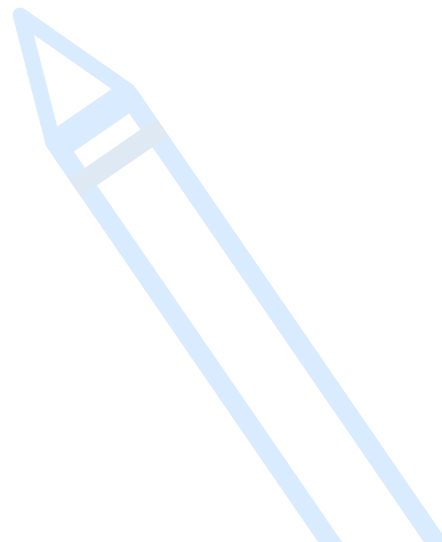
GUEST SPOTLIGHT

ED WALTERS

CEO, FASTCASE

- Think of your business as a flywheel so that small successes move the flywheel and allow you to build momentum.
- Profitability is success.
- Relentlessly build on small victories.
- There are different ways of being successful.
- Every docket sheet is a map of a legal journey.
- After two decades, the headwinds become tailwinds.
- Go pursue great ideas.

"Quiet the self-talk because it is too easy to talk yourself out of good ideas."





GUEST SPOTLIGHT

RICK WEBER

MANAGING PARTNER, ARBOR RIDGE PARTNERS

- The best way to acquire market share is to buy it.
- It is faster and easier to buy revenue than to grow revenue.
- There was more panic during the early days of the pandemic.
- There is still a lot of confusion around pricing, some of which may be intentional given that it is difficult to distinguish providers.
- The same elements that make a good marital partnership make a good business partnership.
- No one's job is secure. As an entrepreneur, you often have more control over your destiny and better security.

"The pandemic has provided opportunities for people who always thought about becoming entrepreneurs to actually go out and become one."



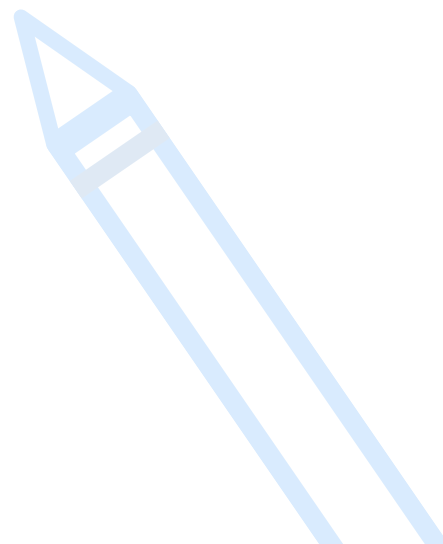
GUEST SPOTLIGHT

NATHAN WENZEL

CO-FOUNDER OF SIMPLELEGAL, AN ONIT COMPANY

- As a startup, when you treat the money like it is your own, you spend it carefully and wisely without sacrificing growth.
- Not every headline or social media post is real, so don't hold yourself to that standard.
- The job of a leader is to help team members find their optimal areas of success.
- People and processes solve problems, not technology.

"Trust is critical in any environment, but especially when managing a distributed, remote workforce."



LOOKING AHEAD


Looking back over the last year of conversations provides a dynamic roadmap for the path forward. Many of the fundamental principles that drive career success and strengthen relationships have not changed. In fact, a dedication to excellence, a commitment to community, and a willingness to collaborate are foundational hallmarks of the Virtual Lunch. The ability to discuss these and other issues helped us all through this challenging period and will certainly shape what comes next.



MOVING FORWARD
CLOSING THOUGHTS



Moving Forward

- There was a lot of unnecessary business travel prior to the pandemic.
 - Dress codes may change as professionals return to offices with no visitors.
 - Organizations may convert unused commercial space into studios for training.
 - Many professionals have started using existing technology, rather than asking for funds to buy new tools.
 - Now is the time to readjust, reimagine, and reconfigure.
 - Employers want to work with people who can solve problems.
 - We may be breaking free from the inertia that has prevented change in legal.
 - The office is overrated; employees should have a choice.
 - We are missing accidental encounters by working remotely.
 - It is critical to create virtual proximity to mirror the serendipity of being in a physical office.
 - It is important for companies and law firms to live their values.
 - A lot has changed in the past year, but this isn't the last time we will experience change.
- 



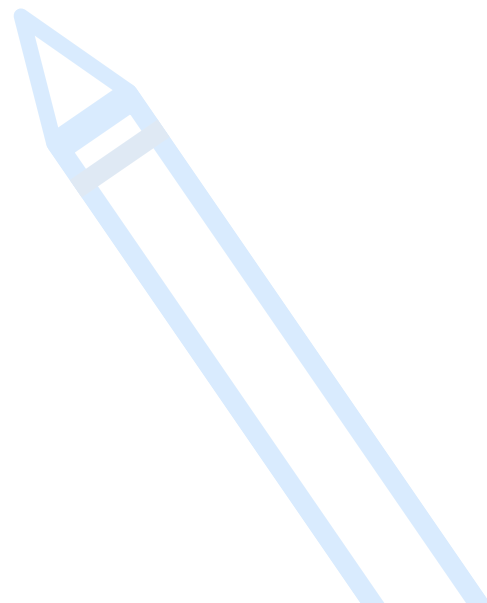
GUEST SPOTLIGHT

RALPH BAXTER

THOUGHT LEADER, ADVISOR, AND FORMER CHAIRMAN,
ORRICK, HERRINGTON & SUTCLIFFE LLP

- The lessons we learn from the pandemic about new models of working are critical.
- Law firms have drifted away from understanding the role law plays in the lives of their clients.
- The Utah sandbox has the potential to be a game-changer.
- Develop mechanisms that are more appealing to and trusted by the client.
- Law firms need to invest.

"It is critical for firms to innovate and rethink the practice of law."





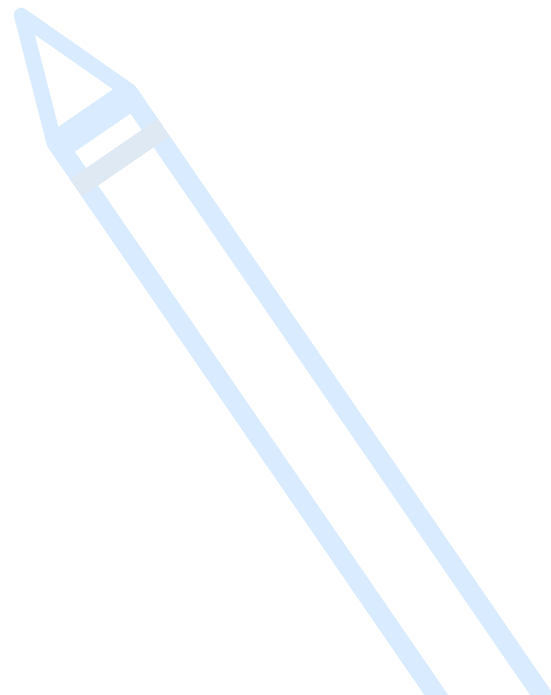
GUEST SPOTLIGHT

STUART CLARKE

REGIONAL DIRECTOR, NUIX

- Trust in international business is critical.
- The increased use of encrypted communications will continue to create challenges for law enforcement professionals.

"Blockchain, 5G technology, Brexit, and sustainability are key areas poised for growth in the next few years."





GUEST SPOTLIGHT

DAVID LAT

FOUNDER, ABOVE THE LAW AND ORIGINAL JURISDICTION

- Clients expect their lawyers to use more technology.
- We will see more billing and talent management innovations.
- The pandemic has been a good time for legal professionals to explore creative projects.

"Law is still a great career and will get better."

Final Thoughts

“There are opportunities to build culture while working from home.”

SCOTT MOZARSKY, MANAGING DIRECTOR, JEGI

If you live in fear, you are not living.

“When we finally see the light at the end of the tunnel that is not an oncoming freight train, we will find opportunities in this experience.”

GINGER SHIMP, SENIOR MARKETING DIRECTOR, SAP

We all need to step back and ask what we contribute and bring to the community.

“Take time to reflect as the current environment is all about managing your energy.”

DANA DENIS-SMITH, FOUNDER, OBELISK SUPPORT

We need to look past the boundaries of the old world.

“When negotiating for new opportunities, leverage facts and find ways to sweeten the deal.”

SHERINE CLARKE, FOUNDER, LAWYERS SUMMIT

Caring about the people you work with a bit more makes a big difference.

“Courts are not set up for a more modern, virtual environment because they are not customer-friendly.”

BRETT BURNEY, FOUNDER, BURNEY CONSULTANTS

There are no absolute answers.

“When you take giant leaps of faith into something that is scary and unclear, the universe often gives you signs to keep going.”

DANNY WEISS, FOUNDER, DANNY WEISS STUDIO

THANK YOU

Thanks to all of those who have attended the Virtual Lunch over the past year, especially those core members of our community who have joined the conversation on more than 30 episodes (indicated in blue).

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FEEDBACK FORUM

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Matt Schneider

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David Schnurman

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Motionize

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Co-Founder and CCO
LexFusion

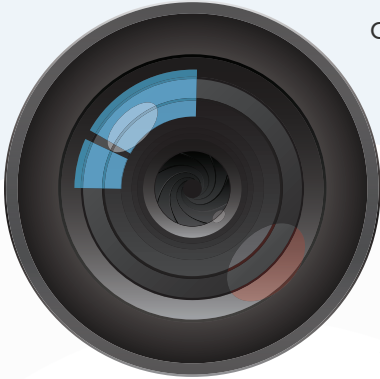
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Clocktimizer

Yuri Zaremba

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AXDRAFT, an Onit company

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Ari Kaplan Advisors is a leading legal industry advisory company that publishes benchmarking reports on legal technology trends, delivers networking, public speaking, and business development training for law firms and other providers of professional services, and offers personal coaching and access to its proprietary coaching software platform, <https://www.Lawcountability.com>.

Company founder, Ari Kaplan, an attorney and legal industry analyst, is an inaugural Fastcase 50 honoree, a fellow of the College of Law Practice Management, and a finalist for ILTA's Thought Leader of the Year award. He is the author of *Reinventing Professional Services: Building Your Business in the Digital Marketplace* (Wiley, 2011) and *The Opportunity Maker: Strategies for Inspiring Your Legal Career Through Creative Networking and Business Development* (West Academic, 2nd Ed. 2016), and has been hosting the [Reinventing Professionals](#) podcast since 2009.

Kaplan serves as the principal researcher for a variety of widely distributed annual reports, hosts the Virtual Lunch on Zoom, and has been the keynote speaker for events worldwide. He is an avid swimmer, a self-taught, struggling, but hopeful, python coder, and a two-time Ironman triathlon finisher. Learn more at www.AriKaplanAdvisors.com.

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