



# Compliance Summit

Thursday 20 May 2021

Times listed are Central Daylight Time

<p><b>9:00 AM – 9:30 AM</b> <b>Virtual Breakfast</b> Join us for casual conversation over coffee or tea</p>
<p><b>9:30 AM – 10:15 AM</b> <b>Keynote: Managing Privacy Compliance: 2021 and Beyond</b> In this mini-keynote session, the speaker will start by providing a brief overview of the current state of global data privacy compliance regulation and then provide practical tips to aid organizations as they strive to create their own tailored data privacy strategy. Attention will be given to key principles of information governance, such as: identifying, protecting, monitoring, remediating, and recovering data. Finally, the speaker will look to the future to give the audience a glimpse of data privacy trends and potential changes that the audience should keep an eye on in order to be prepared. <b>Speaker: Rebecca L. Rakoski</b>, Co-Founder and Managing Partner, XPAN Law Partners</p>
<p><b>10:15 AM – 10:30 AM</b> <b>Break</b></p>
<p><b>10:30 AM – 11:45 AM</b> <b>A Deep Dive On the M365 Compliance Tools</b> In the deep dive into Microsoft 365 compliance tools webinar session, the speakers will provide attendees with an overall background of the various tools available, what they should be utilized for, who should be making use of them and share best practice around how to get the best value out of your subscription. It is our hope that attendees will leave this session and return to work with ideas on how to implement the various pieces of technology within your organization. <b>Speakers: Natalie Noonan</b>, Global Black Belt – Compliance, Cybersecurity Solutions Group, Microsoft, <b>Jason Bero</b>, Privacy, Risk, and Compliance Officer, Microsoft, and <b>Manny Sahota</b>, Director of Solution Sales – Legal, Compliance, Privacy, Microsoft</p>
<p><b>11:45 AM - 12:00 PM</b> <b>Break</b></p>
<p><b>12:00 PM – 1:15 PM</b> <b>Wait, I Own What? An Overview of Microsoft Security Products</b> Microsoft licensing has always been a convoluted web of options and choices. More often than not, you have no real idea of what you can and cannot utilize. In this roundtable discussion session, the panelists will break down the various licensing options and what these levels present to you. More importantly, they will help clarify what you actually have in your tool belt and what benefits you may be missing by not upgrading to the next level. <b>Moderator: David Forrestall</b>, CEO, SecurIT360 <b>Panelist: Rich Lilly</b>, Partner   Director, Security, Netrix</p>
<p><b>1:15 PM – 1:30 PM</b> <b>Break</b></p>



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## Sanitization – Data Retention and Disposal Policies and Practices

The proper storage, retention and destruction of data is an area of concern for many firms as we look to better define our data handling practices and policies. Client requirements, information security, and ethical obligations can all have influence on how firms' decide on the direction of their programs. Areas of interest span from traditional retention and destruction concerns to questions of cryptography, discovery, transfers vs. copies, among others. Understanding what prompts firms to make different decisions regarding these issues is key to helping your firm leaders understand the varied and significant choices available to them as you evolve your data handling program. This session will help provide context for addressing these important questions.

**Moderator: David Hansen**, Vice President of Compliance, NetDocuments

**Panelists: James A. Merrifield**, Director of Information Governance & Business Intake, Robinson & Cole LLP, **Leigh Isaacs**, Director, Information Governance, DLA Piper LLP US, and **Tina Harkins**, Director of Customer Success, Prosperoware

2:45 PM – 3:15 PM

## Bringing Order to Chaos: Thoughts on How to Bring Structure to Unstructured Data

Most organizations have data in various repositories that are relatively unstructured. For law firms, having client data residing in unstructured repositories presents governance issues that could easily be mitigated if only there was a way to tag content with relevant metadata that follows the content regardless of where it exists. This roundtable will discuss potential opportunities for implementing such classification.

**Moderator: Karen Allen**, Manager of Information Governance Technology, Morgan Lewis

**Panelists: Madeleine La Cour**, IGP Director, Business Intake and Records, Baker Botts, **Beau Mersereau**, Chief Legal Technology Solutions Officer, Fish & Richardson, and **Jessica Marlette**, Information Governance Counsel, White & Case LLP

3:15 PM

## Virtual Happy Hour

Summer Drink Recipe Swap and Tasting