



Monday, October 20
9:00 am-10:30 am

009 Considerations in Outsourcing Legal Services

Gabriel Buigas
General Counsel
Hewlett-Packard Company

Michael L. Goodman
Managing Attorney
NIKE, Inc.

David Perla
Co-Chief Executive Officer
Pangea3 LLC

Daniel Reed
Chief Executive Officer
UnitedLex

Faculty Biographies

Gabriel Buigas

Gabriel Buigas is the vice president and general counsel for the Hewlett-Packard Company (HP) in Houston. He has led HP's efforts in evaluating and implementing the outsourcing of certain legal services to an external legal process outsourcing (LPO) organization. Mr. Buigas also manages the personal systems group (PC's and handhelds) and technology services group (Servers, Storage, SW and Services) organizations for HP. These legal organizations provide advice and support to global business units comprising PSG and TSG on antitrust/competition law, program and project structuring, risk assessment and risk mitigation, alliances, partnering and in-bound relationships, contract development, and review and negotiation.

Mr. Buigas previously served HP in managing the legal teams in the Americas and Latin America region. Prior to joining HP, he worked as an attorney in Los Angeles, Madrid, Tokyo, and Miami.

Mr. Buigas holds a BBA from the University of Miami and a JD from Harvard Law School.

Michael L. Goodman

Michael L. Goodman is the managing attorney of the business practice group in the NIKE, Inc. legal department in Beaverton, OR. In his role as an attorney, Mr. Goodman has represented NIKE in ITO and BPO transactions, totaling well over a billion dollars. He has also been an active participant in numerous discussions about how best to streamline contract processes and reduce costs. Recently, Mr. Goodman has been considering how to apply lessons from NIKE's ITO and BPO experiences to the legal process area.

Before joining NIKE, Mike practiced law at the Stoel Rives LLP firm in Portland, OR, where he focused on corporate, securities, and general business matters.

Mr. Goodman is a graduate of the University of Washington and Harvard Law School.

David Perla

David Perla is the co-founder and co-CEO of Pangea3 in New York City. Pangea3 is the industry-leading legal outsourcing company, according to Brown-Wilson's Black Book of Outsourcing 2007, and was the winner of the Frost & Sullivan 2006 Market Leadership Award for Legal Process Outsourcing, employing approximately 275 people in India and the United States. As co-CEO, Mr. Perla oversees Pangea3's U.S. business operations and manages all sales, marketing, and client relationships for Pangea3 on a global basis.

A business affairs executive and a corporate transactional and operational expert, as well as a seasoned corporate lawyer, Mr. Perla was previously the vice president of business & legal affairs for Monster, the leading global online careers property. At Monster, he oversaw all corporate transactions, including mergers and acquisitions, strategic alliances, partnerships and investments. Prior to joining Monster Worldwide, Mr. Perla served at Katten Muchin Rosenman, a prestigious national law firm. His major clients included Sony Music, Sony Pictures, Sony Online Ventures and SFX Entertainment.

Mr. Perla graduated cum laude from the University of Pennsylvania and later earned his JD from the University of Pennsylvania, where he was the winner of the university's Keedy Cup Moot Court Competition.

Daniel Reed

Daniel Reed is the CEO and founder of UnitedLex in Atlanta. His focus throughout his career has been helping companies optimize the legal, financial and operational aspects of their business.

Prior to founding UnitedLex, Mr. Reed served as managing director of Kanbay International, as well as chief financial officer and general counsel to Adjoined Consulting. Adjoined provided management consulting, integration and outsourcing IT services to a primarily Fortune 500 client base (Adjoined was then acquired by Kanbay International, India's 6th largest IT services provider). At Adjoined, Mr. Reed helped establish the company's unique brand of financial and legal execution while managing various offshore (India, Singapore and Malaysia) service provider relationships.

Preceding his career with Adjoined Consulting, Mr. Reed was vice president of corporate development and legal affairs at SmartDisk Corporation where he guided the company through early stage structuring and execution of its initial public offering, and was responsible for all offshore (Japan, Taiwan and the Philippines) shared services, corporate development activity, and research and development activity from a legal perspective. In addition to working with Greenberg Traurig LLP, where he represented venture backed and Fortune 500 companies in the technology, financial, healthcare and manufacturing sectors, Mr. Reed began his career with Ernst & Young LLP providing audit and tax advice services to New York City area companies.

Mr. Reed received a BS from the University of Florida and is a graduate of Vanderbilt University.

ACC Session 009 Outsourcing Legal Services

October, 2008

David Perla, Pangea 3 (Panel Sponsor)
Dan Reed, United Lex (Panel Sponsor)
Mike Goodman, Nike (In-House Counsel Panelist)
Gabriel Buigas, HP (In-House Counsel Panelist)

Topics to Be Discussed

- Ethics
- Type of Legal Services Commonly Outsourced
- Knowledge Management & Process Improvement
- Transition to Outsourcing
- Technology and Outsourcing
- List of Outsourcing Legal Services Providers

Ethics & (Un)Authorized Practice of Law

- **Bar Opinions on Outsourcing**
 - Los Angeles County Bar Association (June 2006)
 - Association of the Bar of the City of New York (August 2006)
 - San Diego County Bar Association (January 2007)
 - Florida Bar Association (proposed - September 2007)
- **Common Criteria**
 - Competence: Competent outsourcing legal services provider.
 - Responsibility: U.S./state bar attorney supervises and is responsible for the final work product.
 - Cost: Fees are reasonable and are approved by client.
 - Privilege: Client confidences are protected.
 - Conflict: No conflict between client and outsourced provider.
 - Client Disclosure/Approval: Disclosure to client, and, where appropriate client approval is obtained.

Type of Legal Services Commonly Outsourced

- **Intellectual Property**
- **Litigation**
 - Patent
 - e-Discovery
- **Contracts**
 - Drafting
 - Abstraction
- **Corporate**
 - Due Diligence
 - Corporate Secretarial Work
- **Considerations Informing Outsourcing**
 - Geography: Time Zone Sensitive Work/Non-Time Zone Sensitive Work
 - General Skills vs. Specialized Expertise
 - Volume and Scalability

Knowledge Management & Process Improvement

- **Knowledge Management**
 - Contract Playbooks
 - Clause Banks
 - Technology: Customer Relationship Management Tools
- **Process Improvement**
 - Six Sigma and Lean
 - Standardized, Metrics Based Efficient Processes
 - Law Firm Resistance vs. Outsourcing Providers Engagement

Transition to Outsourcing

- Migration/Integration Planning
 - Timeline
 - Scaling Up Activities
 - Setting and Managing Expectations
 - Internal Change Management Process
 - Short Term Additional Work for Long Term Efficiency
- Supply Chain Management: How Can Clients Improve Internally to Increase Efficiency of the Outsourcing Provider?
 - Communication
 - Management of Non-Lawyer Stakeholders
 - Unambiguous Workflow
 - Planning and Timing
 - Management of the Other Side

Technology and Outsourcing

- Integration
 - Security
 - Document Creation and Sharing
 - Document Review Tools
 - Document and Contract Management
 - Creation, Maintenance, Deletion, Metadata, Workflow

List of Outsourcing Legal Services Providers

- United Lex
- Pangea3
- Mindcrest
- Quislex
- Evaluserve
- Integreon
- CPA Global

Summary

- Ethics
- Knowledge Management & Process Improvement
- Transition to Outsourcing
- Technology and Outsourcing
- List of Outsourcing Legal Services Providers