

# Continuing Legal Education (CLE)

Programs Course Catalogue



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At OpenText, we recognize that partnership with our customers involves more than the provision of quality software and services. The OpenText Legal Tech Continuing Legal Education (CLE) program is one of the ways we share our knowledge and expertise with the legal community. Our presenters—attorneys with decades of experience—have extensive expertise in eDiscovery and legal technology. We hope you are interested in our free-of-charge CLE program.

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## Data Collection:

### 1. Course: OTLT01

**Course title:** An Attorney's Guide to Digital Data Collection How to Meet Your Obligation to Ensure Defensible and Proportionate Collection of Your Client's Data (CLE accreditation pending)

**Training provider:** OpenText

**Course duration:** 60 minutes

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#### Course outline:

Data collection for eDiscovery and investigations is often considered the most technically rigorous and complex phase of eDiscovery. It is also the stage at which large and unexpected risks, time delays and unnecessary costs can occur. The age-old adage of leaving collections to your client's IT department is a thing of the past. Attorneys under ABA Model Rule 1.1 have the duty to provide competent representation to their clients. This includes having a firm grasp of their clients' sources of potentially relevant electronically stored information (ESI) to be able to competently identify, preserve and collect relevant documents. While attorneys need not go it alone, with many having supervisory responsibility for dedicated third-party collections and forensics experts, lawyers must be able to understand and evaluate discovery costs and burdens, proportionality, protection of privileged documents, and more.

This course will focus on new and emerging challenges in data collection and best practices approaches to ensure a proportional, defensible and cost-effective strategy when overseeing collections.

#### What You Will Learn:

- Risks of over-collection, under-collection and data spoliation
- The challenges that new and emerging sources of data present—chat, ephemeral data and more
- Proportionality and defensibility considerations
- Considerations in balancing collection requirements with data privacy regulations
- How to identify and help clients avoid unseen pitfalls
- Best practices for collecting from a remote workforce
- When and why you should recommend forensic imaging of client data

#### Who Should Attend:

- Partners, Associates, Counsel & members of litigation/disputes and regulatory practices groups
- eDiscovery/Litigation Support Professionals
- IT Professionals

## Technical Competency:

### 2. Course: OTLT02

**Course title:** The Duty of Technology Competence in eDiscovery: eDiscovery 101 (Active CLE accreditation in OR, WA & CA. CA 1.0 ethics credits)

**Training provider:** OpenText (Firm speaker optional)

**Course duration:** 60 minutes

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#### Course outline:

Technology has yielded great efficiency and advancements for both business and the practice of law. While technologies offer many benefits to increase efficiency and reduce risk by minimizing mistakes, there are also associated risks and pitfalls. Recognizing the benefits (and risks) that technology can play in eDiscovery and investigations, the ABA modified its Model Rules in 2012 to make clear that a lawyer's duty of competence now also includes competent use of technology.

This CLE session will cover key eDiscovery concepts as well as providing the latest need-to-know information including ethical obligations and new and emerging eDiscovery technology.

#### What You Will Learn:

- What is the Electronic Discovery Reference Model (EDRM)
- How to manage ethical and professional obligations related to eDiscovery including the duty of technology competence
- Understanding and applying the rule of proportionality
- The next frontier of search—visualization, analytics and AI including technology-assisted review
- Putting theory into practice with a mock investigation using real Freedom of Information Act data

#### Who Should Attend:

- Partners, Associates, Counsel & members of litigation/disputes and regulatory practices groups seeking an introduction to eDiscovery
- eDiscovery/Litigation Support Professionals

### 3. Course: OTLT03

**Course title:** A Practical Guide to Using Technology-Assisted Review in Litigation: An Overview of the Use of TAR in Litigation (CLE accreditation pending)

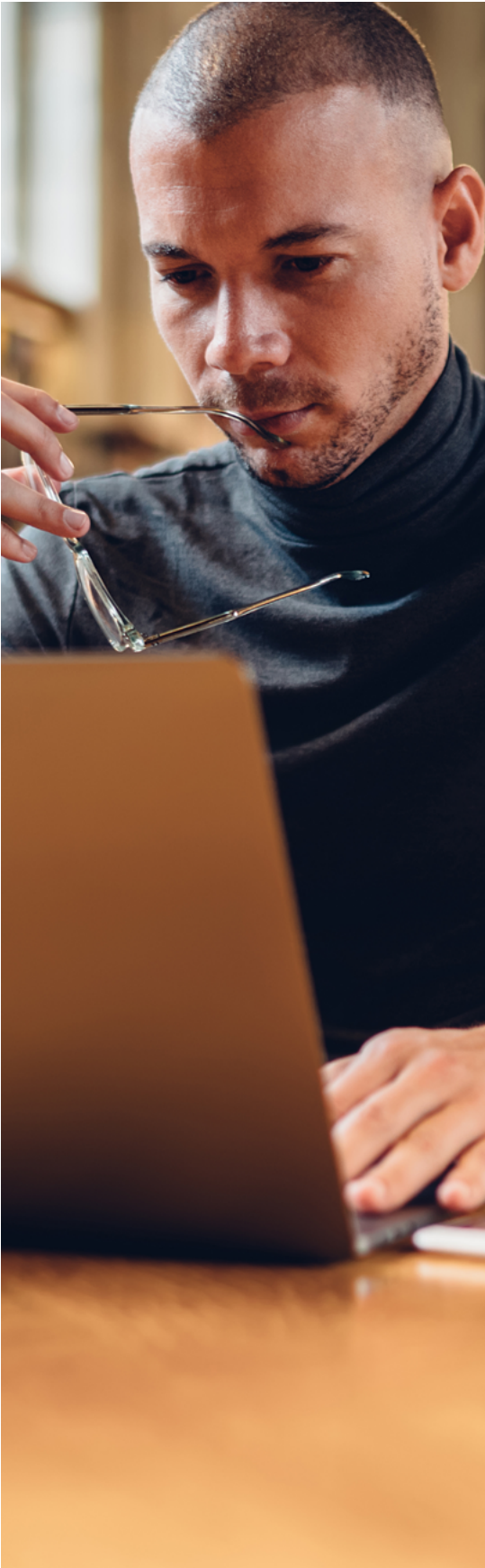
**Training provider:** OpenText

**Course duration:** 60 minutes

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#### Course outline:

Rapid developments in legal technology, and a continued focus on process excellence are fuelling innovation in law firms and corporate legal departments. Join legal technology specialists as they identify the key forces driving change in litigation, including ongoing developments in technology-assisted review (TAR).



**What You Will Learn:**

- When, why and how to use TAR in litigation—best practices
- Differences amongst TAR protocols and choosing the right tool for the job
- Judicial acceptance of TAR
- Continuous active learning measurement and validation

**Who Should Attend:**

- Partners, Associates, Counsel & members of litigation/disputes and regulatory practices groups
- eDiscovery/Litigation Support Professionals

**4. Course: OTLT04**

**Course title:** Tech Matters—Managing Legal and Ethical Issues at the Cutting Edge of eDiscovery  
(CLE accreditation pending)

**Training provider:** OpenText

**Course duration:** 60 minutes

**Course outline:**

In just 10 years, case law around eDiscovery AI & Analytics has exploded. Over 100 published opinions specifically address technology-assisted review (TAR) and predictive coding—evaluating complex and nuanced issues such as defensibility, workflow design, protocol negotiation, and transparency obligations. In the meantime, dozens of state bar associations have imposed ethical obligations for lawyers to maintain technical competency, including within eDiscovery. Join OpenText professionals who will help you learn what you need to know about the intersection of ethics and AI in eDiscovery.

**What You Will Learn:**

- Key legal issues around eDiscovery and technology
- Latest developments in the jurisprudence around technological competency obligations
- Key case law governing the application of machine learning to eDiscovery
- Understanding the potential ethical issues around technology

**Who Should Attend:**

- Partners, Associates, Counsel & members of litigation/disputes and regulatory practices groups seeking a deeper dive into TAR
- eDiscovery/Litigation Support Professionals

## Investigations:

### 5. Course: OTLT05

**Course title:** Managing the True Challenges in a Compliance Investigation  
(CLE accreditation pending)

**Training provider:** OpenText (Firm speaker optional)

**Course duration:** 60 minutes

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#### Course outline:

Compliance investigations are fraught with challenges from start to finish—from the pre-planning stage through the presentation of the final report detailing the factual findings. Recognizing, anticipating, and addressing these challenges in advance will benefit every aspect of the ultimate investigation. In turn, consistently implementing protocols in a considered manner will ensure an efficient, effective, thorough and successful compliance investigation. Join this session with OpenText investigation experts for tips and tricks for the best possible results on your next compliance investigation.

#### What You Will Learn:

- How to develop, implement and enforce policies and procedures that will facilitate downstream investigation
- How to manage personnel, privacy, privilege and cross-border implications and concerns
- How to appropriately scope the investigation and control data proliferation
- How to ensure an effective, thorough and complete assessment

#### Who Should Attend:

- Partners, Associates, Counsel & Members of legal, regulatory and compliance practice groups
- eDiscovery/Litigation Support Professionals

### 6. Course: OTLT06

**Course title:** Bending the EDRM Continuum  
(CLE accreditation pending)

**Training provider:** OpenText (Firm speaker optional)

**Course duration:** 60 minutes

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#### Course outline:

In any investigation, accessing the facts quickly is critical to effective and timely resolution. All too often, however, the facts are not well developed or are unknown. Without an understanding of what they are looking for, many teams resort to production style relevance review of large volumes of data. This approach can be inefficient and costly. In this course members of the Recon investigations team will talk about how to bend the EDRM continuum and uncover the truth earlier, more efficiently, and at a lower cost.



**What You Will Learn:**

- Secrets of using advanced visual and textual analytics to conduct targeted investigations
- How technology-assisted review based on continuous active learning can help investigation teams uncover critical facts fast
- How predictive search can accelerate your investigation
- How sentiment analysis can help uncover subtle clues
- What it means to prove a negative in an investigation

**Who Should Attend:**

- Partners, Associates, Counsel & members of litigation/disputes and regulatory practices groups
- eDiscovery/Litigation Support Professionals

**Document Review:**

**7. Course: OTLT07**

**Course title:** The Anatomy of an Efficient Document Review: How to Control Document Review Costs and Improve Results (CLE accreditation pending)

**Training provider:** OpenText (Firm speaker optional)

**Course duration:** 60 minutes

**Course outline:**

The legal industry is experiencing a shift in business-as-usual dispute and investigations activity. Controlling outside counsel costs remains top priority for law department leaders, while maintaining a competitive advantage is a top goal of law firms. Document review comprises 70% of litigation costs and is therefore a key area of focus to maximize efficiency and lower overall costs. But controlling document review costs and risk has never been more challenging with continued exponential growth of data volumes and complexity, and a transition to a largely remote workforce resulting in additional collection, cybersecurity and data privacy risks. This session will outline key considerations for maximizing efficiency and minimizing risks and costs associated with document review.

**What You Will Learn:**

- How to maximize review efficiency and control using technology-assisted review (TAR 2.0)
- Choosing the right TAR for the job
- Benchmarks for measuring TAR efficiency and completeness—precision and recall
- Leveraging technology (TAR) and process best practices for efficient and effective QC
- Tips for working securely while remote



**Who Should Attend:**

- Partners, Associates, Counsel & members of litigation/disputes and regulatory practices groups
- eDiscovery/Litigation Support Professionals

**Data Breach Response:**

**8. Course: OTLT08**

**Course title:** Help! We've Been Hacked: Best Practices for Meeting Legal, Regulatory and Ethical Obligations After a Data Breach  
(CLE accreditation pending)

**Training provider:** OpenText (Firm speaker optional)

**Course duration:** 60 minutes

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**Course outline:**

Data breaches are on the rise, and increasingly involve the inadvertent disclosure or theft of PII, PCI, PHI and/or commercially sensitive data. No matter how prepared your organization or your client may be, prompt response is critical. Lawyers are obligated to safeguard their and their clients' confidential and sensitive information and respond promptly by advising on and acting on all legal issues and matters arising from the breach. This course will focus on best practices approaches, including use of advanced technology to comply with ethical and regulatory obligations effectively and efficiently.

**What You Will Learn:**

- The regulatory framework, ethical obligations and timelines that govern data breach response
- Considerations in preparing an effective data breach response plan
- Processes to consider for meeting deadlines and fulfilling data breach notification requirements with regulators and affected individuals
- A look at how eDiscovery review workflows can be efficiently and effectively applied to identify PII, PCI, PHI and/or commercially sensitive data

**Who Should Attend:**

- Partners, Associates, Counsel & members of litigation/disputes and regulatory practices groups
- eDiscovery/Litigation Support Professionals



## Enterprise Legal Document and Knowledge Management:

### 9. Course: OTLT09

**Course title:** How to Fast-Track Business Development and Win More Business with Enterprise Data Insights (CLE accreditation pending)

**Training provider:** OpenText

**Course duration:** 60 minutes

#### Course outline:

To win new client pitches and be invited to the next stage in request for proposal (RFP) bids it is critical that legal teams expediently find, analyze, and organize specific, strategic knowledge from their experts, legal practitioners and business partners. Yet, with millions of documents stored across disparate on premise and cloud systems, lawyers are increasingly challenged to quickly access relevant information and gain strategic insights to meet both client and internal business demands.

In this course, speakers will discuss best practices for leveraging a modern AI-powered KM solution to gain information insights beyond text-based search, increasing the strategic advantage while spending less time on non-billable work.

#### What You Will Learn:

- How to search billions of records—across multiple data systems—to gain more comprehensive case, project, and client knowledge in moments
- How to quickly and automatically build search models that teams can reuse and share to find and stay on top of the most relevant information available—all without knowing precise keywords
- How visualizations provide the big picture case strategy that clients need to see

#### Who Should Attend:

- Partners, Associates, Counsel & members legal groups
- Knowledge Management Professionals

### 10. Course: OTLT10

**Course title:** Document Management Strategies for Optimized Legal Teams (CLE accreditation pending)

**Training provider:** OpenText

**Course duration:** 60 minutes

#### Course outline:

Law firms and legal departments today are looking to optimize their time as demands on their services increase and budgets decrease. With the right legal content management tools, innovative legal departments can eliminate information silos and time-consuming administrative tasks, while focusing on higher-level activities that will surpass client demands, reduce costs and deliver a competitive advantage. Join this session with OpenText experts and discover how implementing a purpose-built, legal document management (DM) solution that stores all documents and work product in a single place, can take your legal team to the next level of efficiency.

**What You Will Learn:**

- How the right DM solution can provide an information center that can be organized by legal, client or matter content
- How to enhance productivity by centralizing secure document collaboration whether from the web, Office applications, Microsoft Teams, or a mobile/tablet device
- How streamlined searches speed access to relevant information while uncovering strategic insights
- How automatically filing emails alongside your case content saves time by providing a single point of reference for all matter content
- How quickly linking to documents in email reduces document collaboration costs, lost edits and issues arising from sharing an incorrect final version
- How to protect content from a data breach at the document level and with activity monitoring

**Who Should Attend:**

- Partners, Associates, Counsel & members legal groups
- Knowledge Management Professionals

## Presenter Bios:



### **Adam Tondryk, Esq., PMP**

Director, Cloud Services Managed Review, OpenText

A former litigation associate, Adam Tondryk is an expert at helping review teams use OpenText's advanced technology to achieve greater efficiency and savings. He has over 10 years' experience managing a large variety of document reviews (including overseas) and developing best practices for quality assurance and review project management protocols. He regularly assists clients with designing document review workflows and is adept at forming rapid-response teams to staff any size and type of review.

Adam regularly speaks as a subject matter expert at industry trade shows, educational seminars and presentations to clients. He holds a dual B.A. in Economics and Behavioral Science and Law from the University of Wisconsin-Madison and a J.D. from the University of California, Hastings College of the Law. Bar status includes Illinois Bar, 2002; District Courts for the Northern and Central Districts of Illinois, 2003. He is also a certified Project Management Professional (PMP).



### **Tom Gricks III**

Lead Strategy Consultant, OpenText

Tom Gricks is a prominent eDiscovery lawyer and one of the nation's leading authorities on the use of TAR in litigation. Tom advises corporations and law firms on best practices for applying technology to reduce the time and cost of discovery. He has more than 30 years' experience as a trial lawyer and in-house counsel, most recently with the law firm Schnader Harrison Segal & Lewis, where he was a partner and chair of the eDiscovery Practice Group.

Tom is a member, Sedona Conference, Working Group 1, and is admitted in the United States Supreme Court, Third Circuit Court of Appeals, Eighth Circuit Court of Appeals, Tenth Circuit Court of Appeals, United States District Court for the District of Colorado, United States District Court for the Western District of Pennsylvania, United States District Court for the Middle District of Pennsylvania, Supreme Court for the Commonwealth of Pennsylvania. He holds B.S., Chemical Engineering, from Carnegie Mellon University and a J.D., cum laude, Duquesne University School of Law.





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**Tracy Drynan**

Principal Consultant, OpenText

Tracy Drynan joined OpenText in 2020 as Principal Consultant, where she leads the Recon Investigations team. Tracy brings deep experience assisting leading law firms and their clients in nearly all aspects of the eDiscovery lifecycle, and has over 12 years of experience providing investigative analysis to clients. Prior to joining OpenText, Tracy served as Senior Staff Attorney, Cleary Gottlieb Steen & Hamilton LLP, where she spearheaded team and strategy management, M&A data collection and interview guidance, vendor relationships and technology consulting to Cleary staff and project attorney teams.

Tracy is a renowned industry speaker and author on topics including predictive coding, forensic collections, and advanced analytics in investigations, is co-chair of the D.C. Bar eDiscovery Committee, a Coach for Georgetown eDiscovery Academy and former Director of the D.C. Chapter of Women in eDiscovery. She holds a B.A. in Political Science from the University of Nevada at Las Vegas and Masters in International Political Economy and J.D. from the University of Denver, with bar admissions in the District of Columbia and Colorado.



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**Adam Kuhn**

Principal Solutions Consultant, OpenText

Adam Kuhn is a Principal Solutions Consultant at OpenText Discovery and an eDiscovery lawyer based out of Tampa, Florida. Adam works with some of the world's largest enterprises, law firms, and regulators on their legal technology programs and workflows with an emphasis on predictive systems for investigations and document review. He holds an advanced certification for OpenText Axcelerate and received the Rossman award from the USPTO Society for his contributions to legal scholarship. Adam is an accredited CLE instructor in several states and has been featured on Legaltech News' list of 18 millennials changing the face of legal technology. Adam joined Recommind in 2014 prior to its acquisition by OpenText in 2016. Before that, Adam was an eDiscovery analyst at a Fortune 500 company and an associate consultant focused on complex trademark and patent disputes and damages. Adam received his JD and MBA from the University of San Francisco, his BA from New York University, and is an active member of the California bar.



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**Andy Pratt**

Senior Account Executive, OpenText

After spending nine years at Perkins Coie where he worked as a Senior Discovery Consultant overseeing teams of technologists, managing complex projects, and consulting with case teams and their clients, Andy Pratt joined OpenText in late 2018. In his new role, Andy is now applying his wealth of experience to assist a broader group of law firm and corporate clients with a range of complex problems, including traditional litigation-related discovery, as well responding to governmental and internal investigations, public records requests, data breaches, and compliance with data privacy laws such as GDRP and the California Consumer Privacy Act. Andy is an active member of the Washington State bar. He received his JD from Lewis and Clark Law School and practiced as a real estate and land use litigator for several years before focusing on eDiscovery.



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**Angela Green**

Lead Solutions Consultant, OpenText

Angela is a licensed attorney with more than 17 years of legal, litigation support, and management experience. She has a strong technical and training background as well as a hands-on demonstrated knowledge of eDiscovery software, workflows, and operations. Angela combines her litigation and eDiscovery experience to work with clients to develop and implement proactive, matter-specific, cost efficient, and defensible legal and technical strategies for discovery. She has experience managing the full spectrum of the EDRM (from information governance through trial), managing and development of processes and procedures using best practices, past performance, and innovative technology (analytics, TAR, complex workflows), as well as providing the client with an understandable, easy to follow, sound process for any unique situation. Angela is an active bar member, admitted to practice law in the Commonwealth of Pennsylvania. She received her JD from Widener University School of Law, and practiced as a real estate lawyer in Georgia, worked at an AmLaw 100 firm and, led high profile matters for Federal, State, Local and Military agencies.



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**John J. Pappas Jr., Esq.**

Midwest Director, OpenText

Lawyer and experienced eDiscovery consultant John Pappas is Midwest Director with OpenText. Before joining OpenText, John was a litigator and trial attorney, specializing in commercial litigation, products liability and warranty litigation, construction litigation, insurance casualty and coverage litigation, and all aspects of eDiscovery including data collection, processing, and advanced search and analytics.

After seventeen years in the practice of law, John advises clients on eDiscovery strategies, admissibility of electronic evidence, along with best-practices for understanding and reducing data volumes to ultimately lower discovery costs.

John is a member of the EDRM Global Advisory Council, a co-chair on the Seventh Circuit eDiscovery Pilot Program, a member of WG 1 of the Sedona Conference, and President of the ACEDS Chicago Chapter. He has presented at continuing legal education seminars across the Midwest on eDiscovery and technology-assisted review topics.

John received a J.D. from the John Marshall Law School and a B.A. from Michigan State University. He is admitted to practice in Illinois.





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**Kim Heyde**

Lead Solutions Consultant, eDOCS, OpenText

Attorney and experienced information management consultant, Kim Heyde, OpenText eDOCS Lead Solutions Consultant and former eDOCS Product Manager uses her love of technology, problem solving and unwillingness to take no for an answer, to provide meaningful information management solutions to help users solve complex business problems.

Prior to her technology career, Kim practiced law in Ohio for 10 years and is a member of the Ohio State Bar Association. She received her J.D. from Ohio University and has a B.A. from Bethany College in West Virginia and an M.A. from The Ohio State University.

Kim is a frequent speaker regarding Information Management on Industry panels, webinars and podcasts.

**About OpenText**

OpenText, The Information Company, enables organizations to gain insight through market leading information management solutions, on-premises or in the cloud. For more information about OpenText (NASDAQ: OTEX, TSX: OTEX) visit: [opentext.com](https://www.opentext.com).

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