

Leadership Council on Legal Diversity

2015 Pathfinder First Meeting

**April 17-18, 2015
Katten Muchin Rosenman LLP
Chicago, Illinois**

Agenda

April 17, 2015

12:00 - 1:00 PM

Registration & Lunch

1:00 - 1:30 PM

Welcome & Orientation

Gregory B. Jordan, LCLD Member; Executive Vice President and General Counsel, PNC Financial Services Group, Inc.

Lori L. Lorenzo, Program Director, LCLD

1:30 - 2:30 PM

Opening Plenary: The Leader Within

Ritu Bhasin, Founder and Principal, bhasin consulting inc.

The path to leadership is not always clear, and each successful leader could describe a different journey, but along the way some elements—both good and bad—are the same. Among diverse lawyers, imposter syndrome often threatens to derail career success. Learn what it is and how to navigate its implication in this opening session.

3:00 - 5:30 PM

Plenary: Make an Impact! Capture, Communicate, and Build Your Brand for Meaningful Relationships

Ritu Bhasin, Founder and Principal, bhasin consulting inc.

The old saying, “It’s not what you know, but who you know,” still rings true, but for more reasons than you may think. Having a deep network of high-quality professional relationships is not only essential to career success but plays a key role in longevity and career satisfaction. Your brand within your firm dictates how much work you get and from whom. It is this work that paves the road to partnership and key leadership roles within the firm.

5:30 - 6:30 PM

Study Group

Assigned study groups will meet to review the day’s materials and prepare their case studies for the next day.

7:00 PM

JW Marriott Chicago,
Jackson Room

Welcome Reception

Pathfinders will join local LCLD Members and Fellows for this reception.

8:45 PM

Off-site

Dine-Arounds

Join your fellow Pathfinders for dinner at a local restaurant. Please note that dine-arounds are at the Pathfinders’ expense.

Please see the next page for the April 18 meeting agenda.

April 18, 2015

8:00 - 8:30 AM

Breakfast

8:30 - 10:00 AM

Joint Training Workshop: Know Thyself

Hassan Kamel, Lead Associate, Otto Kroeger Associates

Every successful leader must have one key skill—the desire and ability to engage in self-assessment. This session will help you understand your Myers-Briggs type and your emotional intelligence to help you better understand yourself and how best to navigate your workplace.

10:00 AM - 12:15 PM

Breakout Sessions:

Law Firm: Sponsorship

Carrie J. Fletcher, Executive Director, Harvard Law School Executive Education

Vincent A.F. Sergi, LCLD Member; Chairman, Katten Muchin Rosenman LLP

In-House: A Strategic Business Partner

John Mitchell, “The Purple Coach” and Owner, KM Advisors, LLC

12:30 - 1:30 PM

Lunch

1:30 - 3:30 PM

Breakout Sessions:

Law Firm: Know Yourself—The Emotional Intelligence Analysis

Joanna Kirke, Associate, bhasin consulting inc.

Understand the critical need for Emotional Intelligence (EQ) in the workplace for leadership effectiveness and organizational sustainability; increase awareness of the neuroscience behind emotional hijacking and how to regain rational thinking in times of stress; how to develop heightened EQ; and, how to create strategies for improved emotional responses in situations where you are under stress.

In-House: Leading Cross-Functional Teams

Erica D. Brown, 2014 LCLD Fellow; Senior Counsel, McDonald’s Corporation

Jandá M. Carter, 2014 LCLD Fellow; Corporate Counsel, Caterpillar Inc.

Waqas A. Durrani, 2011 LCLD Fellow; Associate General Counsel,

Esurance Insurance Services, Inc.

Gerard Gregoire, 2012 LCLD Fellow; Director of Litigation Services,

Eastern Region, Allstate Insurance Company

The in-house legal department cannot be known as the land of “no.” Every in-house lawyer must understand how to be a strategic partner to business to “make money the right way.”

April 18, 2015 (continued)

3:45 - 4:45 PM

Closing Plenary: Leadership Essentials, Build Your Ability to Deliver and Receive Feedback

Chris De Santis, Specialist in Management and Organization Development

Both giving and receiving tough feedback is difficult, but feedback is an essential part of learning and growth. Learn to master two skills in this session: first, build the trust required to elicit difficult but career-building feedback from colleagues and, second, develop the courage necessary to give honest feedback to others.

4:45 - 5:00 PM

Closing Session

Lori L. Lorenzo

Speakers



Ritu Bhasin, LL.B., M.B.A., is Founder and Principal at bhasin consulting inc., a firm that provides people management and leadership strategies to international organizations with an emphasis on diversity and the advancement of women. Bhasin is also Co-Founder of Mivoko Inc., an application that puts a voice to everyone's name in order to address the many issues surrounding name mispronunciation. Along with her sister, Bhasin is Founder of Insayva, a platform for self-empowerment for those seeking personal and professional growth, which includes leadership retreats for professional women.

Bhasin has extensive experience in delivering leadership/training programming and providing coaching services across a range of people management areas, with a focus on diversity and the advancement of women. She has been certified to administer intercultural competence assessment tools for teams and individuals, including the Intercultural Development Inventory and the Intercultural Conflict Style Inventory. She is also trained in neuroscience coaching strategies for leadership growth. Bhasin has now coached hundreds of professionals, focusing on empowering them to leverage their strengths in their development.

Previously, Bhasin spent 10 years in the legal profession, first practicing civil litigation and public law, and then serving for seven years on the senior management team of a preeminent Canadian law firm as their director of legal talent management. An inspiring and engaging speaker, Bhasin is a regular contributor in the media. Lastly, Bhasin is a trained instructor in a few yoga disciplines and, when she is not working, you will find her in a "downward dog."



Erica D. Brown is Senior Counsel in McDonald's Global Legal Department. Brown advises in all areas of labor and employment law, including federal and state anti-discrimination statutes, union organizing, wage and hour, covenants not to compete, performance management, severance agreements, employment agreements, employee investigations, employment policies and procedures, Sarbanes-Oxley Act, immigration, National Labor Relations Act, WARN Act, Older Workers' Benefits Protection Act, Fair Labor Standards Act, Equal Pay Act, Americans with Disabilities Act, Family and Medical Leave Act, and Fair Credit Reporting Act. She trains managers regarding lawful union avoidance strategies, effective discipline and documentation practices, harassment prevention, and other Human Resources best practices. Brown develops strategies for compliance and responding to administrative claims before government agencies and onsite investigations. She also leads cross-functional teams that are dedicated to enhancing McDonald's system and employment processes.

Prior to entering private practice, Brown served as a senior law clerk to the Honorable Joseph W. Hatchett, former Chief Judge for the U.S. Court of Appeals for the Eleventh Circuit, in Tallahassee, Florida. She also served as law clerk to the Honorable U.W. Clemon, former Chief Judge for the U.S. District Court for the Northern District of Alabama, in Birmingham, Alabama.

Brown is admitted to practice law in the District of Columbia, North Carolina, and Illinois. She received her Bachelor of Arts degree from the University of North Carolina at Chapel Hill, and her Juris Doctor from Duke University School of Law. Brown lives in Oak Park, Illinois and is the proud parent of Marcus Alexander, her 14-year-old son.



Jandá Monique Carter graduated high school as valedictorian, and attended Purdue University where she received her Bachelor of Science degree in interdisciplinary engineering (mechanical engineering and pre-medicine). Later, she pursued a master's degree in food process engineering from the University of Illinois.

Carter worked as a project development engineer for General Motors and as a process engineer for Quaker Oats before attending the University of Dayton School of Law, focusing on intellectual property. While in law school, Carter worked for GE Aircraft Engines and interned at the U.S. Patent and Trademark Office in Washington, D.C.

After graduation she moved to Cincinnati, Ohio and practiced as a patent attorney with Frost Brown Todd for five years, focusing on patent drafting and prosecution, providing advice and counsel, and handling FDA and food labeling law related matters.

Currently, she is Corporate Counsel for Caterpillar Inc. where she supervises a team of patent attorneys for the Energy and Power Group. Previous to her current leadership role, Carter worked in the IP Risk Management Group negotiating IP licensing agreements, master development agreements, and M&A deals. Prior to that, she was a patent attorney responsible for diverse patent portfolios including Global Mining, Transmissions, Production Systems, and Advanced Powertrain Research.

Carter recently completed her LCLD 2014 Fellowship and she serves on the Licensing Subcommittee for IPO. She is a member of AIPLA, the National Bar Association, AKA, and is licensed to practice before the USPTO. Carter is on the Board of Directors for both METEC and South Side Office of Concern, and on the Board of Trustees for the University of Dayton.

In her spare time, Carter loves to read, scrapbook, and is active with Heritage Ensemble Choir where she sings First Soprano. She has been a member of the choir for almost nine years and is a featured soloist. She is also a teacher with the Street Law program, and is involved at her church. In 2014, she was elected by the Mayor and City Council to serve as a Peoria Fire and Police Commissioner for three years.



Chris De Santis is an independent consultant specializing in the design and delivery of management and organization development interventions. He assists individuals or groups in identifying obstacles to effectiveness and subsequently works with them to create user-friendly solutions aligned with the company's strategic initiatives. He brings with him 30 years of experience in training and development; graduate degrees in organization development and marketing; and work

experience in manufacturing, service, and not-for-profit environments. He has an undergraduate degree in business from the University of Notre Dame, an M.B.A. from the University of Denver, and an M.A. in organization development from Loyola University.

De Santis has done training and instructional design work with service organizations such as Accenture, Abbott Labs, and Ernst & Young. He has been the director of training and development for the American Medical Association, and he was part of the Human Resource Development group for Brunswick Corporation, a leader in the manufacture of leisure products. He has worked as an independent practitioner for the past 18 years. He has done management and executive development course design, implementation, and facilitation, as well as the delivery and evaluation of training training initiatives. He has numerous vendor certifications and he has performed both needs

assessments and the subsequent course deliveries to address those needs.



Waqas A. Durrani is Associate General Counsel at Esurance, an affiliate of Allstate Insurance Company. In this role, Durrani reports to the vice president and general counsel of Esurance and directly manages a team of nine lawyers and three paralegals. He advises business partners on a broad range of matters, including commercial transactions, intellectual property, federal and state regulatory compliance, marketing and advertising, product development, litigation, and employment matters.

Prior to assuming his current role, Durrani served as New York regional counsel for Allstate. In that role, Durrani was a registered New York State lobbyist and proactively advocated Allstate's interests in state legislative and regulatory venues and served as Allstate's primary liaison with the New York Department of Financial Services and the New York State Legislature. Durrani worked to build and maintain relationships with industry and community organizations and advocated Allstate's public policy positions with legislators, regulators, and consumers. Additionally, he served as a member of Allstate's New York Management Operating Committee, which was responsible for the strategic management of a business with revenues in excess of \$2.5 billion.

Durrani began his career at Allstate in its headquarters in Northbrook, Illinois in 2001 where he was responsible for mergers & acquisitions, commercial transactions, regulatory, and antitrust matters until he assumed the role in New York in 2009.

Prior to joining Allstate, Durrani was corporate counsel at U.S. Office Products Company, a start-up company based in Washington, D.C. where he primarily handled mergers and acquisitions, commercial transactions, and general corporate matters.

Durrani earned a Juris Doctor from the University of Illinois College of Law. He also holds a Master of Science in journalism from the University of Illinois at Urbana-Champaign and a Bachelor of Arts, *cum laude*, from Loyola University of Chicago. Durrani currently resides in San Francisco, California.



Carrie J. Fletcher is the Executive Director of Executive Education at Harvard Law School (HLS), where she works with faculty and an administrative team to develop leadership programs that serve law firm managing partners, emerging law firm leaders, and general counsel from across the globe.

Before joining HLS Executive Education, Fletcher was the executive director of law programs at the Fullbridge Program, where she designed curricula focused on professional and business skills development and managed ongoing and new client relationships. Prior to her time at Fullbridge, Fletcher spent 18 years in both practicing and business-side roles at large law firms. From 2007-2013, she was a member of the Professional Development & Training team at Goodwin Procter LLP, where she created and implemented programming for partners and associates that focused on leadership development, core professional skills instruction, and substantive legal skills training. Fletcher also practiced complex commercial and soft intellectual property litigation from 1996-2007, initially in Chicago, and then at Foley & Lardner's Boston office for the last nine years of that period.

Fletcher received her J.D. from the University of Michigan Law School (December 1995) and her B.A. (April 1993, with honors) from the University of Michigan.



Gerard Gregoire is a Director of Litigation Services, Eastern Region, for Allstate Insurance Company Staff Counsel. He has held several different positions over the past 15 years that he has been employed with Allstate. He received his undergraduate degree from the University of Houston where he graduated in three years with a degree in political science. He then received his Juris Doctorate from Thurgood Marshall School of Law at Texas Southern University.

Gregoire was recruited by the Dallas County District Attorney out of law school and was promoted to the Felony Division within one year. He was the chief misdemeanor prosecutor in six county criminal courts for Dallas County.

Currently as Director of Litigation Services for the Eastern Region, Gregoire's area of responsibility includes New York, Pennsylvania, New Jersey, Delaware, Georgia, Alabama, Tennessee, Florida, Maryland, Virginia, and the District of Columbia.

Gregoire is licensed in Illinois, Washington, and Texas. He is a member of the Texas Bar Association, Washington State Bar Association, Illinois Defense Counsel Association, TIPS, American Bar Association, and Washington Defense Trial Lawyers Association. He was a 2012 Fellow with the Leadership Counsel on Legal Diversity and is currently active within the organization. Gregoire is currently Chair with the American Bar Association's Staff Counsel Committee for TIPS. He is a former member of the Board of Directors for the Illinois Defense Counsel Association. He is also a former member of the Texas College of the State Bar, Chicago Bar Association, Dallas Bar Association, Houston Bar Association, and the Texas Young Lawyers Association. He currently enjoys coaching pee wee football in Chicago.



Gregory B. Jordan is Executive Vice President and General Counsel of The PNC Financial Services Group. He is responsible for overseeing all of the legal functions for the corporation. In addition, he leads PNC's relationship with the government, including its regulatory affairs, regulatory policy, and government affairs operations; and oversees PNC's corporate ethics office as well as The PNC Foundation.

Prior to joining PNC in October 2013, Jordan was the global managing partner of Reed Smith, and chairman of the senior management team and executive committee. During his 13-year tenure as managing partner, Reed Smith completed a series of combinations in Europe, California, New York, Chicago, the Middle East, and Asia, to become one of the largest firms in the world, with more than \$1 billion in revenue and 1,800 lawyers in 25 offices.

Jordan has been listed in *The Best Lawyers of America* since 1995 and has received recognition from *The American Lawyer*, *The Lawyer*, and *Law360*. He has been a frequent speaker on legal leadership and trends, and manages numerous civic responsibilities. He serves as a board member of Highmark, Inc., the Global Business Coalition on Education, U.S. Chamber of Commerce Center for Capital Markets Competitiveness, and the Extra Mile Education Foundation. He is also Chairman of the Board of Trustees of Bethany College.

Jordan obtained his bachelor's degree, *magna cum laude*, from Bethany College in 1981. He graduated in 1984, *cum laude*, from the University of Pittsburgh School of Law, where he was a member of the *University of Pittsburgh Law Review* and the Order of the Coif. In addition, he is admitted to the Pennsylvania and West Virginia Bars.



Hassan Kamel, M.S. (Lead Associate at Otto Kroeger Associates), is an expert trainer, project manager facilitator, and coach with a strong background in leadership development, experiential learning, and R.O.P.E.S. (Reality Oriented Personal Experiential Scenarios). His work includes teambuilding workshops, organizational assessments, and facilitation of multi-stakeholder workgroups. Frequent topics include communications, conflict management, leadership development, and other business areas. Kamel is equally adept at working with small and large groups, and has a particular expertise in devising experiential learning approaches for training involving personality type and emotional intelligence. He works with clients nationally and internationally.

Kamel is a certified Master Practitioner and Master Trainer in using the Myers Briggs Type Indicator® (MBTI®), and EQ-i® 2.0 and EQ360® emotional intelligence assessments. He is also certified in the use of the Apter Motivational Style Profile (AMSP®), Strength Deployment Inventory® (SDI®), and other industry-leading tools.

For over a decade Kamel served as adjunct faculty at George Mason University, teaching classes in the theory and application of adult experiential education. He served as the associate director of Outward Bound Professional in the Mid-Atlantic region and as professional development program manager at George Mason University's Center for Experiential Education.

From 2005 to 2014, Kamel project-managed, taught, and coached for OKA's long-term professional and leadership development program with the U.S. Air Force's Basic Military Training at Lackland Air Force Base in San Antonio, Texas.

Kamel holds a B.S. and an M.S. in biology with focus in environmental science and public policy from George Mason University. He resides in northern Virginia.



Joanna Kirke, MBA, is a coach, facilitator, and consultant at bhasin consulting inc., a firm that provides people management and leadership strategies to a range of global organizations. Kirke has over 10 years of talent management experience in developing and delivering high-impact workshops and coaching across a spectrum of areas, including:

- Leadership: Emotional intelligence, team effectiveness, performance management, succession management, employee engagement, conflict management, delivering/receiving effective feedback
- Cultural Competence: Behavioural preferences, cross-cultural communication, adaptive leadership
- Diversity and Inclusion: Unconscious biases, effective diversity recruitment, team effectiveness
- Women's Advancement: Sponsorship, career management, decision-making, leadership presence

Kirke has now designed and conducted workshops and speaking engagements in her areas of expertise

across global organizations such as BMO Financial Group, Capital One, TD Bank, Goldcorp, Cameco, PMC-Sierra, the Board of Education in Japan, and Honda.

Throughout her career, Kirke has coached hundreds of leaders in global organizations in several areas of people leadership and across industries and cultures. Kirke is known for her ability to quickly gain trust and build rapport with her coaching clients in order to create greater accountability, behavioural change, and results. Kirke is qualified to administer several leadership assessment tools and leverages these tools in her coaching work: Intercultural Development Inventory (IDI) and the Intercultural Conflict Style Inventory (ICS), EQ-i 2.0 Assessment, Myers-Briggs Type Inventory, and Experience-Change Simulation.

Previously, Kirke spent 10 years in HR management and leadership consulting in the financial services, high-technology, telecommunications, and oil and gas industries. Kirke is committed to giving back to the community and has volunteered extensively in Canada and abroad. She has won several awards for her work in leadership, international work, and community involvement. In her spare time, Kirke loves to travel, watch live music, or adventure in nature.



Lori L. Lorenzo is the proud mom of four kids: Amanda, 13; Mark, 10; Kyle, 7; and Ethan, 5. In her role with the Leadership Council on Legal Diversity (LCLD), she is responsible for supporting LCLD's efforts to promote diversity and inclusion among Member organizations, developing and managing LCLD's strategic programs, and promoting understanding of legal diversity issues generally.

Lorenzo has published several articles and she is a frequent speaker on diversity with organizations including the American Bar Association, the National Association for Law Placement (NALP), and the Association for Legal Administrators, among others.

Lorenzo received her B.A. with honors from the University of Florida and her J.D. from Duke University School of Law. Before joining LCLD, her work experience included law practice in structured finance and securitization, small business ownerships (a martial arts company), and several years managing diversity initiatives for law schools.



John Mitchell is a lawyer and a leader. He is committed to helping lawyers discover their leadership potential so that they continuously develop themselves and their organizations in pursuit of changing the world. Mitchell specializes in working with lawyers in formal roles like general counsel, managing partner, practice group leaders and committee chairs, and those in informal leadership roles. He also supports in-house lawyers transitioning to business roles, junior associates, new partners, major rainmakers, and senior lawyers considering their "second season" in life.

Helping leaders transition to new leadership positions is one area of Mitchell's expertise. He has extensive experience assisting women and attorneys of color in successfully applying their talents in new roles and new environments. Mitchell's unique background brings personal experience to these types of transitions and his educational experiences ground those firsthand experiences with sound theory and applied research.

Mitchell's 20 plus years of business experience ranges from working as a professional in a social service agency, to practicing law in a large international law firm, to leading a large urban affiliate of an internationally known not-for-profit housing development organization, to starting a successful company that helps leaders develop and hone their own unique leadership style.

When he is not working with clients, Mitchell can often be found running or cycling along Chicago's beautiful lakefront. He and his wife can be found at one of the city's many restaurants, cultural institutions, or music festivals. An annual pilgrimage to the New Orleans Jazz & Heritage Festival, visits with friends around the country, and bicycle trips anywhere the terrain is more varied than Chicago's keep Mitchell on the move. So, if you get his voicemail leave a message. More likely than not he is out someplace having fun. But do not worry—he will return your call!



Vincent A.F. Sergi is the Chairman of Katten Muchin Rosenman LLP. Based in Katten's Chicago office, Sergi drives the strategic direction and growth of the firm. He chairs the Board of Directors and Executive Committee and co-chairs the firm's Compensation Committee.

Sergi was elected as national Managing Partner in 1995 and has been integral in shaping Katten into the firm it is today. During his tenure, the firm has grown dramatically through a merger, lateral acquisitions, and foreign expansion. He has been instrumental in recruiting talented people to the firm, which has nearly doubled in size since he took the helm. Under his leadership, the firm has expanded geographically, including a considerable augmentation of the firm's presence in New York and the opening of multiple offices in Texas and California. Sergi also spearheaded the creation of Katten's international footprint with locations in London and Shanghai.

He is instrumental in championing the firm's diversity efforts, leading to many honors and accolades for Katten. The firm is one of only four law firms in the country recognized among the 100 Best Companies by *Working Mother* magazine and was named one of *MultiCultural Law* magazine's top firms for diversity. Katten also earned recognition as one of the "Best Places to Work for LGBT Equality" from the Human Rights Campaign.

A member of Katten's first associate class, Sergi joined the firm in 1974. He previously served as chair of the Commercial Finance group, focusing his practice on counseling lenders in all types of financing transactions.

Sergi is a member of the Chicago United CEO Council, Goodman Theatre Board of Trustees, and the Leadership Council on Legal Diversity. He has been honored by *Crain's Chicago Business*, *Lawdragon* as a 500 finalist (2010), and the Leading Lawyers Network, Top 250 Leading Business Lawyers in Illinois (2014).

Sergi earned a J.D. from Northwestern University School of Law and a B.A. from Beloit College. He is admitted to the Illinois Bar.



LEADERSHIP · ACTION · RESULTS

www.lclldnet.org

LCLD 2015 Pathfinder First Meeting

April 18, 2015 Session Supplement

**10:00 AM -
12:15 PM**

Breakout Session: In-House: A Strategic Business Partner

John Mitchell, "The Purple Coach" and Owner, KM Advisors, LLC

David G. Nadig, Senior Vice President & Deputy General Counsel, Allstate Insurance Company



David G. Nadig is the senior legal officer for Allstate's \$30 billion insurance operations and is part of the business unit's senior management team. He joined Allstate's Law Department in 1985 and progressed through the company with increasing levels of responsibility inside and outside the Law Department. He currently oversees a team of more than 60 lawyers and professionals who are accountable for all legal matters related to the property and casualty insurance operations and life insurance operations of the company and its subsidiaries. Nadig received his J.D. in 1985 from Loyola University of Chicago, where he earned a position on the National Moot Court Team and, in 1982, earned a Bachelor of Science degree with highest honors in journalism from the University of Illinois, Urbana.



LEADERSHIP
COUNCIL
ON LEGAL
DIVERSITY

LEADERSHIP · ACTION · RESULTS