

# THE PDI Connection

January 2017

Ogletree Deakins

### New Year, New Look

by Michelle Wimes, PDI Director



Welcome to the first edition of our new electronic quarterly newsletter, the PDI Connection! I am excited that after five years, we have decided to change direction and be a little more

environmentally sound while at the same time bringing you news about our accomplishments in the professional development and diversity and inclusion arenas more frequently. The PDI Connection will be distributed quarterly rather than twice a year.

There is much to be celebrated at this fiveyear mark. Five years ago, the Professional Development and Inclusion (PDI) department was in its infancy, consisting of little more than myself, one manager, and a half-time administrative assistant. Fast forward, and the firm has invested tremendous resources in these two areas: we are now a department of seven with a director, two managers, two coordinators, a diversity analyst, and an administrative assistant.

Five years ago, there was no formal women's initiative and no business

resource groups. Today we have ODWIN, the Ogletree Deakins Women's Initiative—a strong, committed group of women focused on retaining and advancing women to leadership positions—as well as four other resource groups dedicated to the success of our Latino, African-American, Asian-American, and LGBT attorneys. Each group is led by shareholders who share PDI's vision of growing a talented diverse pool of lawyers who provide exceptional client service in communities around the world.

Moreover, five years ago we did not participate in vital national diversity and inclusion benchmarking efforts such as the Human Rights Campaign Foundation's Corporate Equality Index where we now have earned a perfect score of 100. Additionally, we have celebrated receiving first-time awards (e.g., recognition as a top 50 law firm for women by *Working Mother* as well as Gold Standard Certification from the Women in Law Empowerment Forum) that before now were simply out of reach.

Our strides in the professional development arena have been just as remarkable. In fact, our professional development efforts have been the bedrock of our diversity initiatives, thereby distinguishing us from our competitors.

We have developed comprehensive benchmarks for three practice groups: Labor and Employment, Immigration, and ERISA Litigation. These benchmarks outline the developmental milestones we expect our associates to achieve while giving them greater ownership of their careers. Additionally, a new initiative, Success the ODWay, provides our attorneys with a learning guide detailing the firm's cultural norms, potential derailers, and concrete behaviors necessary to achieve success. Our innovative and impactful leadership development and business development programming for topperforming shareholders and associates is supplemented by a plethora of ondemand, bite-sized webinars designed to enhance our attorneys' professional skills. What's next on the agenda? A comprehensive professional development curriculum that can be deployed in any of the 49 offices we maintain across the world.

These are simply exciting times for Ogletree Deakins' PDI efforts! I hope you enjoy reading about the efforts of our myriad business resource groups as well as how we have supported diversifying the legal profession in the many communities where Ogletree maintains an office.

### **Professional Development**

### Trial Tactics Training with NITA

Sixteen top-performing Ogletree Deakins associates were selected to participate in this learn-bydoing program led by faculty from the National Institute for Trial Advocacy (NITA), including Ogletree Deakins' own Maria Greco Danaher (Shareholder, Pittsburgh), at the 2016 Attorney Retreat in Houston, Texas.

The rigorous program covered the key steps in the trial process. Associates participated in mock impeachment drills, pre-trial motions, direct and cross-examination, and opening and closing statements.





#### Success the ODWay

Success the ODWay (SODW) is a project led by the PDI department to identify and articulate the traits and behaviors of successful Ogletree Deakins attorneys as well as derailment patterns and personal brand-killers.

The PDI department hired an external consultant who interviewed a crosssection of over 50 shareholders and key administrative personnel. A broad sample of associates' perceptions was gathered through group work done at the Associate Meeting in 2014, and during the Client Development program in 2015. The findings were presented to more than 100 shareholders at the 2016 Annual Shareholder Meeting. Those shareholders further refined the document, which was then finalized by the Professional Development Steering Committee. The final SODW Learning Guide was presented to associates and of counsel at the 2016 Attorney Retreat.

SODW Learning Guide details specific, observable behaviors that lead to success within the firm's cultural norms. Paired with ODPro, the firm's labor and employment benchmarks, the SODW Learning Guide allows attorneys (especially associates) the opportunity to take greater ownership of their careers and proactively chart the course of their advancement at Ogletree Deakins.



#### Interviewing the ODWay



The PDI department, the Recruiting department, and the Diversity & Inclusion Steering Committee collaborated to create Interviewing the ODWay (IODW), a recruiting playbook for local offices. IODW offers tips and a list of suggested interview questions based on the findings of Success the ODWay. The goal is to increase the probability of a good fit for both the candidates and the firm.

## Client Development Program

Twenty-three associates attended this program led by Brianna Leung of the Akina Group. Associates met via phone and/or video conference for two sessions during the summer



Brianna Leung

and then came together at the 2016 Attorney Retreat to discuss how to use storytelling as a business development tool.

## Client Development Plus Program

The CDP+ program was put together for 12 graduates of the 2015 CDP class. They met on three separate occasions via phone and/or video conference to hone their business development skills. The group came together for their final session at the 2016 Attorney Retreat where they participated in an interactive crossselling workshop, also led by Brianna Leung of the Akina Group.

#### **Business Growth Program**

This program is designed for 10 senior non-equity shareholders. This year's group was 40 percent women and 20 percent racial or ethnic minority. The program, which began in 2012, has the goal of giving selected non-equity shareholders the opportunity to maximize business development leads and grow their books of business.

Consultants Allan Colman and Frank Mims (The Closers Group) lead the program, which has been very successful in meeting its goal. One participant said, "The group

gained so much by coming together and discussing various ideas and issues and client matters....Having a scheduled call provided that sometimes needed incentive to devote time to marketing efforts instead of focusing only on the existing work and putting the marketing off for a later date."



# Foundations of Inclusion and Cultural Competence

The Human Resources, Learning and Employee Development, Recruiting and Retention, and PDI departments together with the General Counsel's office, launched an e-learning diversity and inclusion program: Foundations of Inclusion and Cultural Competence, created by Ritu Bhasin, of bhasin consulting inc. This four-part series provides foundational training on diversity and inclusion principles and explores key concepts, including the importance of inclusion in the workplace; the difference between diversity and inclusion; how to develop cultural competence; and key strategies to become more inclusive.

Every member of the Ogletree
Deakins family was given access
to the training to complete in
the month of October.

#### LOCAL INITIATIVES

### San Francisco Offers LawLifeHacks to Associates

The Professional Development ambassador for the San Francisco office sends a monthly email including trainings, seminars, book recommendations, podcasts, and other resources to help attorneys survive and thrive.



### Indianapolis Provides Training on New Firm Policy

In August, firm librarian Deb DeFouw and paralegal Denise Simpson led a session explaining the firm's new policy on conducting background checks for Ogletree Deakins personnel.





Addressing a fundamental need with a touch of humor, the Los Angeles office continues its Little Red School

House program. This interactive, practical program for associates covers topics ranging from "The Litigation Countdown" and "E-Discovery Basics" to "Mediation Ethics" and "Class Action Declaration Projects."

### **Diversity and Inclusion**

### What's New: Business Resource Groups

The firm hosted a session, "Lean In: Empowering Women in the Workplace," at the firm's annual attorney retreat in 2013. Attended by over 180 of the firm's women lawyers, the forum was designed to discuss challenges facing women lawyers in today's workforce.

The Lean In session created a launching pad for a new formal women's initiative – **the Ogletree Deakins Women's Initiative**. The main focus of this initiative is to empower women with the skills they need to advance within the firm. It is led by Ashley Prickett Cuttino (Shareholder, Greenville) and Kerri S. Reisdorff (Shareholder, Kansas City).

After conducting a firm-wide survey of all women shareholders in the firm, ODWIN leadership designated **four key focus areas** chaired jointly by women shareholders: **Talent Development** (Danielle Vanderzanden, Shareholder, Boston and Katessa Charles Davis, Shareholder, Los Angeles); **Alumnae Relations** (Maria Greco Danaher, Shareholder, Pittsburgh and J. Carin Burford, Shareholder, Birmingham); **Flexibility/Awareness** (Leslie E. Wallis, Shareholder, Los Angeles and Kelly S. Hughes, Shareholder, Charlotte); and **Business Development/Client Relations** (Danielle Ochs, Shareholder, San Francisco and Margaret H. Campbell, Shareholder, Atlanta).

Also in 2013, the firm created its first business resource groups for **Arican-American attorneys(ODBar)** and **LGBT attorneys(ODAlliance)**Business Resource Group. Attorneys across the firm who identify with

and/or support initiatives that aid in the professional development and engagement of said diverse attorneys participate. Both groups also serve as informal networking and business development hubs for the firm.

In September 2015, the firm hosted diversity retreats for attorneys who identify as LGBT, veterans, disabled, and attorneys of color.

This retreat offered a safe place to explore the unique challenges diverse attorneys face in majority environments. As a result, two additional diverse business resource groups were formed. Read on to learn more about these groups. ◆



This year's reception kicked off the Attorney Retreat with a panel discussion.

### Ogletree Deakins Women's Initiative (ODWIN)

Co-Chairs: Ashley Prickett Cuttino (Shareholder, Greenville) and Kerri S. Reisdorff (Shareholder, Kansas City).

Mission: ODWIN serves as a resource to enhance the firm's commitment to its women attorneys by creating and fostering an environment of inclusiveness through active involvement in the firm's business development, recruitment, retention, and educational awareness efforts as they relate to women attorneys at the firm. ODWIN focuses on four key areas:

- Power: Leadership that matters to include positions of authority inside and outside of the firm.
- Access: Opportunities to network, crosssell, train, mentor, and sponsor junior attorneys.
- Equity: Credits and compensation that adequately reflect experience, ability, and investment of time.
- Balance: Formal policies and the use of industry best practices that foster greater work-life balance.

#### **Events & Sponsorships:**

- Women In-house Counsel Workshops and Receptions
- National Association of Women Lawyers Annual Conference
- American Bar Association Commission on Women in the Profession – Margaret Brent Women Lawyer of Achievement Awards Ceremony
- Working Mother Flex-Time Lawyers Gala Awards Ceremony
- Corporate Counsel Women of Color
- Women, Influence & Power in Law Conference

### Ogletree Deakins Black Attorney Resource Group (ODBar)

**Co-Chairs:** Dawn T. Collins (Shareholder, Los Angeles) and Danielle Ochs (Shareholder, San Francisco).

Mission: ODBar serves as a resource to enhance the firm's commitment to diversity by creating and fostering an environment of inclusiveness for black attorneys through active involvement in the firm's business development, recruitment, retention, and educational awareness efforts. ODBar provides a platform for black attorneys to cultivate professional development, hone relationship building skills, and seek the support necessary to effectively navigate and succeed within the profession.

#### **Objectives:**

- Leverage legal expertise for business development purposes.
- Evaluate metrics relevant to ODBar.
- Provide mentoring opportunities.
- Recruit new and lateral black attorneys to the firm.
- Increase visibility of black attorneys within the firm.
- Serve as a firm-wide public relations resource on matters and opportunities in the black community.

#### **Events & Sponsorships:**

- Charting Your Own Course
- National Bar Association Corporate Counsel Conference
- National Employment Law Council
- Annual ODBar BBQ
- National Bar Association Annual Convention
- Minority Corporate Counsel Association Diversity Gala
- Corporate Counsel Women of Color Conference
- Association of Corporate Counsel Foundation Event
- National Bar Association Labor and Employment Section Annual Conference

### Ogletree Deakins Asian American Attorney Resource Group (ODA<sup>3</sup>)

Co-chairs: Gregory C. Cheng (Shareholder,

San Francisco), Sarah J.
Hawk (Shareholder, Raleigh/Atlanta), and Gillian P.
Yee (Shareholder, Detroit (Metro).

Mission: ODA<sup>3</sup> serves as a firm-wide resource that aids in the recruitment, retention, and

advancement of Asian American attorneys. ODA<sup>3</sup> provides increased visibility and leadership opportunities for its members and serves as a platform for members to cultivate professional development, leverage relationships, and access the support necessary to succeed at the firm.

#### **Objectives:**

- Develop and implement business development strategies.
- Provide mentoring relationships to ODA<sup>3</sup> attorneys.
- Evaluate metrics relevant to the professional and business development of ODA<sup>3</sup>
- Recruit and retain lateral Asian American attorneys to the firm.
- Increase visibility of Asian American attorneys within the firm.

#### **Events & Sponsorships:**

- South Asian Bar Association of North America Annual Convention
- National Asian Pacific American Bar Association Annual Convention

#### Ogletree Deakins Lesbian, Gay, Bi-Sexual, Transgender (LGBT) Attorney Resource Group (ODAlliance)





Co-chairs: Dawn T. Collins (Shareholder, Los Angeles) and Keith A. Watts (Shareholder, Orange County).

Mission: ODAlliance serves as the firm's primary internal resource for LGBT attorneys and their allies. The group is the point of contact between Ogletree Deakins and the LGBT community at large, serving to raise awareness within the firm of areas of interest to the LGBT community and, particularly, social issues affecting LGBT attorneys.

ODAlliance also supports firm-wide diversity and inclusion by focusing on business development, recruitment, educational awareness, and retention initiatives that positively impact LGBT attorneys.

#### **Objectives:**

- Leverage legal expertise for business development purposes.
- Evaluate metrics relevant to ODAlliance.
- Provide mentoring and sponsorship opportunities.
- Recruit new and lateral LGBT attorneys to the firm.
- Increase visibility of LGBT attorneys.
- Serve as a firm-wide public relations resource on matters and opportunities in the LGBT community.

#### **Events & Sponsorships:**

- National LGBT Bar Association Lavender Law
- Out & Proud Corporate Counsel Award Reception

### Ogletree Deakins Hispanic/Latino Attorney Resource Group (Adelante)

Co-Chairs: Rodolfo R. Agraz (Shareholder, Dallas/Raleigh) and Patti C. Perez (Shareholder, San Diego).

Mission: Adelante serves as a resource to enhance the firm's commitment to diversity by creating and fostering an environment of inclusiveness for Hispanic/Latino attorneys through active involvement in the firm's business development, recruitment, retention, and educational awareness efforts. Adelante provides a platform for Hispanic/Latino attorneys to cultivate professional development, hone relationship building skills, and seek the support necessary to effectively navigate and succeed within the profession.

#### **Objectives:**

- Leverage legal expertise for business development purposes.
- Evaluate metrics relevant to Adelante members.
- Provide mentoring opportunities.
- Recruit new and lateral Hispanic/Latino attorneys to the firm.
- Increase visibility of Hispanic/Latino attorneys within the firm.

#### **Events & Sponsorships:**

- Hispanic National Bar Association Annual Convention
- Hispanic National Bar Association Corporate Counsel Conference
- La Raza Lawyers Association Annual Scholarship Dinner & Gala



#### LOCAL INITIATIVES

### Charlotte Office Proud Diamond Supporter of "Fighting for Women Fashion Event"

Each year, the Charlotte Women Attorneys and the Women Physicians Section of the Mecklenburg County Medical Society sponsor the Fighting for Womenwith Fashion Event, which benefits Safe Alliance, an organization whose mission is to provide hope and healing for people in crisis. This year's event raised over \$62,700 for current programs at the Clyde and Ethel Dickson Domestic Violence Shelter.

Representing the firm at this event were Margaret Santen Hanrahan (Shareholder), Benjamin R. Holland (Shareholder), Lia A. Lesner (Associate), Elizabeth R. Dangel (Associate), and Karla Turner Anderson (Associate).



Pictured left to right: Karla Turner Anderson (Associate), Constance Davis (Bank of America), Allison Purmort (Charlotte Hornets), Meredith Ginter (SCOR), and Elizabeth R. Dangel (Associate).



Pictured left to right: Danielle Ochs (Shareholder) and Harold R. Jones (Of Counsel).

#### San Francisco Office Hosts Bay Area Bar Association Leadership Gathering

In June, the San Francisco office sponsored a networking event for the Minority Bar Coalition (MBC). The MBC is a Bay Area network of over 25 diverse bar associations dedicated to working in a unified manner to advance the cause of diversity in the legal profession. MBC does this by sharing best practices and resources in bar association programming and advocacy, finding issues of common cause, and building shared platforms. Danielle Ochs (Shareholder) serves on the Board for the Bar Association of San Francisco, as well as a liaison to the MBC.

#### **Cleveland Office Summer Intern Program**

The Cleveland office hosted sixteen-year-old Loïc Djomani for the month of June. Loïc came to the Cleveland office as a student at St. Vincent-St. Mary High School and was exposed to various aspects of working in a law office. He attended depositions and court hearings, and assisted with administrative tasks. Loïc said, "My internship experience here at Ogletree Deakins was one I'll remember for the rest of my life. It confirmed my interest [in law] which will hopefully stick with me through the remainder of high school, college, and potentially law school."



### Get Connected with...

**Question:** How long have you been with Ogletree Deakins?

**Saunders:** Close to six years. I joined Ogletree in April 2011 as a shareholder. Prior to Ogletree, I was with a 30-lawyer labor and employment boutique in Boston.

Question: In your opinion, what's the best thing about your area of practice?

Saunders: Litigating cases. I really enjoy working on complicated legal issues, which I get to do with my class and collective action work. I also find that work allows me to be more creative in terms of...strategy than single plaintiff cases. I also enjoy trying cases in court and in arbitration.

**Question:** You were recently named one of the "Top Women of Law" in *Lawyers*Weekly in recognition of your leadership and commitment demonstrated in the community. How did that come about?

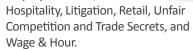
Saunders: One of my colleagues from the Senior Practice Committee of the Women's Bar Association of Massachusetts (WBA)—a committee I chair—nominated me for the award...my long service and leadership of the WBA as a committee chair, former board member of the WBA...my service to and leadership of other organizations...and within Ogletree itself as the co-chair of the Retail Practice Group, was considered worthy of recognition.

Question: You are a member of the firm's Professional Development Steering Committee. Why have you chosen to serve on this committee?

Saunders: When I was coming up as an associate, I didn't have a road map or other resource I could use to figure out what type of experience I needed to get in order to develop...I had to figure it out on my own and did so by taking on lots of cases, working very long hours, getting involved in local bar associations, and trying to glean from the cryptic comments of the partners and clients with whom I worked what I needed to do to improve...with [benchmarking] initiatives like ODPro and Success the ODWay, our associates shouldn't have to do all that since those documents are designed to operate as a road map for associates.

#### Diane Saunders

Title/Location:
Shareholder, Boston
Practice and Industry
Groups: Class Action,
Defense Contracting,
Employment Law,



**Question:** What professional development initiative has been most helpful for your region and/or office?

Saunders: It's still a work in progress, but the Boston office (both shareholders and associates together) has been working to implement ODPro and we hope to use it to create professional development plans for all the associates by year end.



#### Danielle Ochs

Title/Location:
Shareholder, San
Francisco
Practice and
Industry Groups:
Employment Law,

Higher Education, Hospitality, Litigation, Sports & Entertainment, and Unfair Competition and Trade Secrets.

**Question:** How long have you been with Ogletree Deakins?

Ochs: I've been with Ogletree for 8 years.

**Question:** What do you like most about your area of practice?

**Ochs:** I'm primarily an employment litigator, with an emphasis on trial work and trade secrets. In my view, effective litigation requires thoughtful strategic planning, preparation, and execution. I enjoy the strategy involved in this process.

Question: You are a member of the firm's Diversity and Inclusion Steering Committee. Why have you chosen to serve on this committee?

Ochs: For me, "diversity and inclusion" are not just trendy buzzwords. Not only do they reflect my personal worldview on equal opportunity diversity and inclusion also directly relate to how effective we are as lawyers. I believe that we enhance our understanding of issues when we are able to include, share, and rely on many perspectives and experiences. This allows us to have a deeper understanding and to be more dynamic and strategic in our approach to the issues. But, of course, we need diverse perspectives and experiences among our ranks for that to work; so I'm pleased to be able to participate in the firm's efforts to focus on this area.

Question: As co-chair of ODBar (Ogletree Deakins Black Attorney Resource Group), what diversity initiative has been most helpful for your group?

Ochs: True to its name, ODBar has been

an excellent "resource" for its members. ODBar serves as a virtual meeting place for members who work across the country to regularly get together, discuss, and collaborate on key issues and ideas impacting the group. We have tackled associate mentorship and professional development, recruitment and retention issues, and business development.

Question: You were recently a panelist for the Black Women Lawyers of Northern California. How did that opportunity come about, and what was discussed?

Ochs: I am the former President of Black Women Lawyers of Northern California, so I'm occasionally called upon to help with various programs. The program at which I spoke related to how to "make it" in a law firm. I spoke about my law firm experiences (both big and small) over the last 20 years, and the strategies that have helped me develop and enjoy my career. ◆

### Awards & Accolades

#### **Working Mother**

For the first time, Ogletree Deakins was recognized by Working Mother magazine as one of the Best Law Firms for Women. The award honors firms whose programs, policies, and best practices foster significant change for women in the legal profession. Representing the firm at the awards ceremony held in September was ODWIN co-chair Ashley Prickett Cuttino (Shareholder, Greenville), Michelle Wimes (PDI Director), Sisi Hannibal (PDI Manager), Chicago associates Taylor N. Rollinson, Grace H. Ristuccia, Gray I. Mateo-Harris, Rebecca K. Bryant, Sarah J. Platt (Of Counsel, Milwaukee), and C. Matthew Keen (Managing Shareholder, Raleigh). Link to press release here.

### Ogletree Deakins Ranked No. 1 in 10 Best Law Firms for Black Attorneys

Ogletree Deakins was ranked first with the percentages of black attorneys at well above average in the United States. Ogletree Deakins came in at 5.1 percent for black shareholders compared to 1.9 percent overall, and 7.8 percent for non-shareholder level attorneys compared to 2.5% overall. Link to press release here.

# Ogletree Deakins Named in Top Four Firms as GC's Go to for Employment Litigation for Fifth Year in a Row

Once again, Ogletree Deakins was listed among the top four "employment powerhouses" for 2017. BTI Consulting Group conducted interviews with 336 legal decision makers at corporations, spanning over 15 industries. C. Matthew Keen (Managing Shareholder, Raleigh) attributes the recognition to the firm's Client Pledge, and continued commitment to client satisfaction. Access full article here.

# Eight Ogletree Attorneys Elected as Fellows of the College of Labor & Employment Lawyers, Class of 2016

The new Fellows were formally inducted on November 12 at the College's annual dinner during the ABA's 10th Annual Labor and Employment Law Conference in Chicago, IL. Full press release here.

### Ogletree Deakins Recommended in The Legal 500 Latin America 2016

Ogletree Deakins' Mexico City office and the office's managing shareholder have been recommended in the *The Legal 500 Latin America* 2016. This is an authoritative guide to Latin America's leading law firms and individuals who are selected solely on merit. Access press release here.

### Ogletree Deakins Welcomes New Attorneys

- Fauzia N. Amlani-Associate, Atlanta
- Harry M. Rowland, III-Associate, Atlanta
- Luke Donohue-Associate, Atlanta
- Federico R. Muñoz—Associate, Austin
- Corey E. Tanner-Associate, Austin
- Karla Turner Anderson—Associate, Charlotte
- Sara E. McCreary—Associate, Columbia
- John M. Dickman-Shareholder, Chicago
- Robyn M. Funk-Of Counsel, Dallas

- William P. Neubauer-Counsel, Dallas II
- S. Michael Nail-Associate, Greensville
- Courtney D. Beasley—Counsel, Indianapolis
- <u>Amy K. Bergstraesser</u>—Associate, Indianapolis
- <u>Lisa D. Hanchey</u>—Of Counsel, Lafayette/New Orleans
- <u>Debra N. Barsom</u>–Of Counsel, Los Angeles
- Marissa M. Franco Associate, Los Angeles
- Lacey Rainwater—Associate, Los Angeles
- M. Kimberly Hodges-Shareholder, Memphis
- <u>David B. Feldman</u>—Shareholder, New York City
- <u>Shabri Sharma</u>—Associate, New York City
- Nardo Juan Catahan—Associate, Orange County
- <u>Nikki Fermin</u>—Associate, Orange County
- <u>Jennifer Yanni</u>–Associate, Orange County
- Melina V. Villalobos Associate, Raleigh
- Kang He-Associate, Washington

Ogletree Deakins enjoys a long tradition of legal excellence based on high quality work and outstanding attorneys and staff. We are fully committed to the importance of diversity within the workplace and are proud of our record. We welcome high achievers who share our singular focus on providing the highest level of legal services to our clients.

Our Recruiting & Retention team is always open to receiving applications from internal referrals or anyone just interested in hearing more about what we do and openings we have available. All current opportunities are posted on the Careers Page on the OD website. We encourage candidates committed to client service to apply for our opportunities directly, or reach out to

### the firm's Senior Manager of Recruiting & Retention, Vanessa Russell.

Above and beyond the firm's career page, we focus on bar associations, law schools and diversity career boards for our job postings. You will meet our firm representatives seeking exceptional talent at career fairs around the world.