



# Approaches to Legal Project Management: Strategies for Achieving Success

September 18, 2015 | 4.5 General CLE and 1.0 Ethics Credits

## Agenda

8:30 a.m.

### Welcome; Program Introduction

*Kerry Robinson, Professional Development Attorney, CLE Program Chair*

8:45 a.m.

### Session 1: [Perspective of an Employment Litigator](#)

- The Team
- The Timeline
- The Case Story

*Michael Reiss, Partner, Davis Wright Tremaine LLP*

9:15 a.m.

### Session 2: [Perspective of a Business Law Associate](#)

- Serving Clients Well - External and Intra-Firm Clients
- Organization; Time Management Tips

*Michael Zhao, Associate, Foster Pepper PLLC*

9:45 a.m.

### Session 3: [Perspective of a Senior Defense Litigator](#)

- Early Stage Case Development
- Long-Term Planning and Strategizing

*Beth Strosky, Attorney, Keller Rohrback LLP*

10:15 a.m.

### Break

10:30 a.m.

### Session 4: [Perspective of a Judicial Law Clerk](#)

- Project Management Fundamentals
- Serving the Bench - Delivering Quality Work

*Yurij Rudensky, State/Federal Judicial Clerk*

11:00 a.m.

### Session 5: [Perspective of a Litigator and Associate Mentor](#)

- Reducing Unnecessary Stress
- Maximizing Associate Development

- Enhancing Work Product and Job Satisfaction

*Kerry Robinson, Professional Development Attorney*

11:45 a.m. **Lunch Break**

1 p.m. Session 6: [Perspective of an Attorney Certified Legal Project Manager](#)

- Project Management for Lawyers - A Client Service Model
- What it Was - and Has Become
- Why it Works
- What is Needed

*Judith Droz Keyes, Partner, Davis Wright Tremaine LLP*

1:45 p.m. Session 7: [Perspective of an In-House Counsel](#)

- Project Management on the Receiving End
- Suggestions for Delivering Quality Product

*James Pruitt, Corporate Counsel, Costco Wholesale*

2:15 p.m. Session 8: [Perspective of a Pro Bono Counsel](#)

- Case Management in the Pro Bono World
- What LPM Means;
  - For Lawyers Doing Pro Bono
  - For Firms Supporting Pro Bono

*Joanna Plichta Boisen, Pro Bono Partner, Foster Pepper PLLC*

2:45 p.m. **Break**

3:00 p.m. Session 9: [Perspective of an Ethics Counsel](#)

- RPCs Drive Successful Projects
- Agile Project Management
- Competence, Diligence, Communication

*Sean Monahan, Conflicts Counsel, Foster Pepper PLLC*

4:00 p.m. **Conclusion**  
*Kerry Robinson*

4:05 p.m. **Evaluations and Adjourn**

## Faculty Biographies

### Chairperson

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#### **Kerry Robinson, Professional Development Attorney**

Kerry Robinson is a seasoned litigator with 25 years of attorney mentoring experience. Formerly a partner with Davis Wright Tremaine, a compliance attorney at Microsoft, and the Professional Development Counsel at Foster Pepper, Kerry now works independently with firms and lawyers on Legal Project Management strategies, professional development initiatives, mentoring/coaching, associate training, and legal career/life balance goals. She is a long-term homelessness-prevention advocate with the Housing Justice Project, and has served as pro bono counsel for the Seattle Opera Association, the Bellevue Philharmonic and other arts organizations. Kerry has chaired and presented numerous WSBA CLEs, receiving the "Best of the Best Presenter" distinction.

### Speakers

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#### **Joanna Plichta Boisen, Foster Pepper PLLC**

Joanna Plichta Boisen is co-chair of Foster Pepper's Tax-Exempt Organizations group and focuses her practice on the unique issues facing these organizations, including qualification for tax exemption, maintaining tax-exempt status and compliance issues. Her clients include family and corporate private foundations, community foundations, and social service and arts organizations. Joanna also directs the firm's nationally recognized and award-winning Pro Bono Practice, which she founded in 2005. She manages Foster Pepper's wide-ranging pro bono cases and projects and is responsible for the firm's corporate social responsibility initiatives.

#### **Judith Droz Keyes, Partner, Davis Wright Tremaine LLP**

Judy Keyes is a labor and employment lawyer who partners with employer-clients to navigate the complex system of laws and regulations that govern the California workplace. Judy counsels clients on how to: conduct investigations in fulfillment of legal requirements; avoid and respond to claims of discrimination, harassment and retaliation; comply with wage and hour laws (e.g., exempt vs. nonexempt, independent contractors, rest and meal periods); grant and limit periods of time off (e.g. leaves of absence, disability accommodation, vacation, sick leave, "kin care"); and reduce and reorganize staff to meet business goals. She is recognized for her "out-of-the-box" thinking and ability to solve complex human resources and labor relations problems in effective and efficient ways. Judy mediates employment disputes as a mediator and as an advocate, and she litigates employment cases in both federal and state court.

Judy is a Fellow in the College of Labor and Employment Lawyers and is listed in Chambers USA, "Super Lawyers," and "Best Lawyers." In 2015, Judy was selected by Best Lawyers as the San Francisco Lawyer of the Year for Labor & Employment Litigation.

In 2014, Judy achieved certification as a Legal Project Manager. She uses that skill in managing her own legal projects as well as those of her colleagues.

#### **Sean Monahan, Conflicts Counsel, Foster Pepper PLLC**

Sean is Conflicts Counsel and advises the firm on legal ethics and related compliance matters. Additionally, he manages the Conflicts Department, including intake, client engagements, ethical screens, and file closing. He is a 2003 graduate of University of Washington, and holds a JD from the University of Southern California Law School.

#### **James Pruitt, Corporate Counsel, Costco Wholesale**

Jim is Corporate Counsel for Costco Wholesale Corp. where he manages litigation and provides risk-focused guidance to the business teams. He is also the company's Anti-Money Laundering Compliance Officer. Prior to joining Costco in 2009, he spent twelve years with Washington Mutual Bank and JP Morgan Chase. He is formerly a partner at Davis Wright Tremaine.

**Michael Reiss, Partner, Davis Wright Tremaine LLP**

Mike Reiss is a nationally known trial lawyer, particularly in employment cases. Mike has successfully tried more than a dozen discrimination and wage and hour cases, including three class action trials. His successful defense of Boeing in a racial discrimination class action jury trial (*Williams v. The Boeing Company*) was recognized by *The National Law Journal* as a top 10 defense win of the year. He also frequently serves as a mediator and has served as a court-appointed special master in employment class actions.

Mike currently serves on the Board of Directors for the American Employment Law Council, an invitation-only organization limited to the nation's top labor and employment attorneys and in-house counsel. He has written and presented extensively on employment law and litigation topics for the American Bar Association, the American Employment Law Council, the National Employment Law Institute and other similar organizations.

For the past ten years, Chambers USA has recognized Mike as a leading employment trial attorney. He also is named among "The 100 Most Powerful Employment Attorneys" by Human Resource Executive magazine in a list published by Lawdragon.

**Yurij Rudensky, State/Federal Judicial Clerk**

Yurij Rudensky recently served as a clerk for Judge Salvador Mendoza, Jr. in the Eastern District of Washington. Before that, he served as a clerk for Justice Steve Gonzalez on the Washington Supreme Court.

Yurij is a graduate of Yale University and the University of Washington School of Law, where he received the William H. Gates Public Service Law Scholarship. His primary legal interests are in civil rights, consumer protection, and appellate law. He has worked on numerous voting rights law suits, co-founded the Northwest Chapter of the Iraqi Refugee Assistance Project, and served as program manager for King County Bar Association's Housing Justice Project.

**Beth Strosky, Attorney, Keller Rohrback LLP**

Beth Strosky practices in Keller Rohrback's commercial litigation department. Beth began her legal career in 2000 as a law clerk for the Honorable Sidney R. Thomas of the U.S. Court of Appeals for the Ninth Circuit. She then moved to Seattle where she has focused her career on commercial litigation and product liability defense. Beth's experience includes insurance and indemnity disputes; consultation on product liability prevention, including design and warning issues; complex mass disasters and multidistrict litigation; defense of product liability claims involving aircraft, automobiles, commercial and recreational equipment, medical devices, drugs, and chemicals; and general liability claims against commercial businesses and non-profit organizations. Before joining Keller Rohrback, Beth litigated product liability matters at Perkins Coie LLP and represented low-income tenants in eviction matters for the King County Bar Association's Housing Justice Project.

**Michael Zhao, Associate, Foster Pepper PLLC**

Michael Zhao is a rising second-year associate practicing in Foster Pepper's Investment Management Group. His primary concentration is reviewing investments and assisting in advising public pension clients in alternative investment transactions. Michael earned his JD from the University of Virginia School of Law, and a BS from University of Southern California, summa cum laude. Michael is fluent in Mandarin and Spanish.