



CLE Pending

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# LEADERSHIP INSTITUTE

FEBRUARY 20-22, 2018  
& APRIL 10-12, 2018

SMU COX SCHOOL OF BUSINESS  
DALLAS, TEXAS



JONES  
DAY

GT GreenbergTraurig

Weil

# LEADERSHIP INSTITUTE 2018 COURSE SCHEDULE

FEBRUARY 20, 2018	FEBRUARY 21, 2018	FEBRUARY 22, 2018
9:30 a.m. - 10:00 a.m. <b>NETWORKING BREAKFAST</b>	8:00 a.m. - 8:30 a.m. <b>NETWORKING BREAKFAST</b>	7:00 a.m. - 7:30 a.m. <b>NETWORKING BREAKFAST</b>
10:00 a.m. - 12:00p.m. <b>MAKING IDEAS STICK</b>	8:30 a.m. - 12:30 p.m. <b>INTRODUCTION TO FINANCIAL REPORTING &amp; FINANCIAL STATEMENT ANALYSIS</b>	7:30 a.m. - 11:30 a.m. <b>MANAGE FOR SUCCESS OR SET-UP TO FAIL</b>
12:00 p.m. - 1:00 p.m. <b>LUNCH</b>	12:30 p.m. - 1:30 p.m. <b>LUNCH</b>	11:30 a.m. - 12:30 p.m. <b>LUNCH</b>
1:00 p.m. - 5:00 p.m. <b>CREATIVITY, INNOVATION &amp; RISK</b>	1:30 p.m. - 5:30 p.m. <b>VALUE-BASED MANAGEMENT</b>	12:30 p.m. - 3:00 p.m. <b>APPLIED INNOVATION: HUMAN-CENTERED DESIGN</b>
5:30 p.m. <b>EVENING NETWORKING RECEPTION</b>	6:00 p.m. <b>NETWORKING DINNER</b>	

APRIL 10, 2018	APRIL 11, 2018	APRIL 12, 2018
9:30 a.m. - 10:00 a.m. <b>NETWORKING BREAKFAST</b>	8:00 a.m. - 8:30 a.m. <b>NETWORKING BREAKFAST</b>	7:00 a.m. - 7:30 a.m. <b>NETWORKING BREAKFAST</b>
10:00 a.m. - 12:00 p.m. <b>CORPORATE GOVERNANCE &amp; ETHICS</b>	8:30 a.m. - 12:30 p.m. <b>MANAGING THROUGH INFLUENCE</b>	7:30 a.m. - 11:30 a.m. <b>VALUES-BASED DECISION MAKING</b>
12:00 p.m. - 1:00 p.m. <b>LUNCH</b>	12:30 p.m. - 1:30 p.m. <b>LUNCH</b>	11:30 a.m. - 12:30 p.m. <b>LUNCH</b>
1:00 p.m. - 5:00 p.m. <b>PERFORMANCE EVALUATION</b>	1:30 p.m. - 5:30 p.m. <b>MANAGING FOR PERFORMANCE</b>	12:30 p.m. - 3:00 p.m. <b>LEADING IN A VUCA WORLD</b>
5:30 p.m. <b>EVENING NETWORKING RECEPTION</b>	6:00 p.m. <b>NETWORKING DINNER</b>	

Taught by SMU Cox Business Faculty



# Texas General Counsel Forum

## LEADERSHIP INSTITUTE

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Texas General Counsel Forum Leadership Institute, formerly the Forum Institute for Leadership in the Law (FILL), returns to the SMU Cox School of Business this spring with a six-day program occurring on February 20-22 and April 10-12, 2018.

The program was designed by general counsel for general counsel, and provides a unique management program presented in association with the SMU Cox School of Business. Each three-day symposium provides an intensive study of leadership, management and corporate finance, in a classroom with 25-30 general counsel, managing counsel and rising counsel from major companies and organizations.

### LOCATION

SMU Cox School of Business  
Collins Executive Center  
3150 Binkley Ave, Dallas, TX 75275

### PRICING (per person)

Member Companies • Early Bird Price	\$3,000
• After January 17, 2018	\$3,300
Non-members	\$3,500

Includes all instructional materials, breakfasts, lunches, evening events and parking

### SIGN UP ONLINE

[www.tgcf.org/leadership-institute-registration](http://www.tgcf.org/leadership-institute-registration)

# LEADERSHIP INSTITUTE 2018 COURSE OVERVIEW

Day 1

**TUESDAY, FEBRUARY 20**

**9:30 a.m. - 10:00 a.m.  
NETWORKING BREAKFAST**

**10:00 a.m. - 12:00 p.m.  
MAKING IDEAS STICK**

Participants will learn how to better communicate ideas in a way that is memorable and influential. Using six key principles, we will work on ways to improve your communication using language that is simple and concrete, as well as how to use elements of emotion, surprise and story to make sure that the audience remembers and can act on your ideas. The session will utilize video clips, interaction and an application exercise to reinforce the ideas and how they can be used.



**Jay Carson Ph.D.**  
Assistant Professor

**12:00 p.m. - 1:00 p.m.  
LUNCH**

**1:00 p.m. – 5:00 p.m.  
CREATIVITY, INNOVATION & RISK**

In order for organizations to succeed, they must strike a balance between managing complexity with structures and procedures while also managing creativity and innovation, which involves some level of risk taking. The session will use an experiential exercise to demonstrate these tensions and to allow participants to discover key factors that can contribute to organizational creativity and innovation. Emphasis will be on evidence-based modeling for managing innovation in organizations and will help participants develop areas for growing both individual creativity skills and organizational practices that support risk-taking and innovation.

**5:30 p.m. - 7:30 p.m.  
NETWORKING RECEPTION**

Join our host and your classmates for a networking reception with cocktails and heavy hor d'oeuvres.

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# LEADERSHIP INSTITUTE 2018 COURSE OVERVIEW

Day 2

**WEDNESDAY, FEBRUARY 21**

**8:00 a.m. - 8:30 a.m.  
NETWORKING BREAKFAST**



**Hemang Desai, Ph.D.**

Robert B. Cullum Professor  
of Accounting

**8:30 a.m. - 12:30 p.m.  
INTRODUCTION TO FINANCIAL REPORTING &  
FINANCIAL STATEMENT ANALYSIS**

Move past being glazed over when financial information is discussed. The initial financial module reviews income, balance sheet and cash flow statements and their interrelation. This module provides detailed examination of the information conveyed by financial statements. It enhances your understanding of the difference between earnings and cash flows and implications of the difference. Financial analysis, particularly the range of financial ratios and the insights each affords, is introduced.

**12:30 p.m. - 1:30 p.m.  
LUNCH**



**Jim Linck, Ph.D.**

Chair, Department of Finance  
Distinguished Chair in Finance

**1:30 p.m. - 5:30 p.m.  
VALUE-BASED MANAGEMENT**

All decisions impact “value” in one way or another (even non-profits), and to properly evaluate them requires an understanding of what value is, why it is of paramount importance, and how to incorporate value implications in decision-making. The key takeaway for this session is to better understand the source of value. We will examine the interplay between the firm and the financial markets (and the implications thereof), broadly recognize the differences between earnings, cash flow and value, and understand the key drivers of value. We will also introduce a few related core concepts, and illustrate with examples.

**6:00 p.m. - 8:00 p.m.  
NETWORKING DINNER**

Join our host and your classmates for a networking dinner with cocktails and heavy hor d'oeuvres.

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# LEADERSHIP INSTITUTE 2018 COURSE OVERVIEW

Day 3

**THURSDAY, FEBRUARY 22**

**7:00 a.m. - 7:30 a.m.  
NETWORKING BREAKFAST**



**Don Vandewalle, Ph.D.**  
Altshuler Distinguished  
Professor of Management  
and Organizations

**7:30 a.m. - 11:30 a.m.  
MANAGE FOR SUCCESS OR SET-UP TO FAIL**

Why do seemingly strong hires go sour? Why does feedback backfire? Does micro-management deserve such a bad rap? Evidence-base management models, case studies and role-playing are utilized to develop significant insights into the psychological processes underlying leader-employee relationship. These insights provide powerful guidance to initiate and grow productive relationship. The session also integrates the topics to better understand the characteristics of admired, high performance organizations.

**11:30 a.m. - 12:30 p.m.  
LUNCH**



**Kate Canales**  
Research Professor and  
Director of Design and  
Innovation Programs

**12:30p.m. – 3:00p.m.  
APPLIED INNOVATION: HUMAN-CENTERED DESIGN**

Complex and ingrained problems require a means through which to discover the way to a solution. We will review a process which provides a way to move forward even when the solutions might not appear obvious. Design decisions fit into a larger context which includes history, politics, sustainability, ethics, relationships and aesthetics. Courses work to ground students in a world bigger than their own through an understanding of design impact.

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**GT GreenbergTraurig**

# LEADERSHIP INSTITUTE 2018 COURSE OVERVIEW

Day 4

**TUESDAY, APRIL 10**

**9:30 a.m. - 10:00 a.m.  
NETWORKING BREAKFAST**



**Hemang Desai, Ph.D.**  
Robert B. Cullum Professor  
of Accounting

**10:00 a.m. – 12:00p.m.  
CORPORATE GOVERNANCE & ETHICS**

This session will address multiple important themes. Managerial Responsibility over Financial Reporting, Corporate Ethics and Governance and control failures and their implications. The discussion will center around two real case situations. We will examine the above issues with a critical lens discussing the roles (or failure, if you will) of the Management, the Board, Auditors as well as Analysts and Institutional Investors.

**12:00 p.m. - 1:00 p.m.  
LUNCH**



**Gauri Bhat, Ph.D.**  
Assistant Professor

**1:00 p.m. – 5:00 p.m.  
PERFORMANCE EVALUATION**

Performance evaluation explores the techniques to provide feedback and benchmark budgetary control and reporting for your organization. You will discuss expectations and goal congruence for your own budget and how it feeds the larger organizational profile. This will aid in coordinating budgets and metrics across the organization.

**5:30 p.m. - 7:30 p.m.  
NETWORKING RECEPTION**

Join our host and your classmates for a networking reception with cocktails and heavy hor d'oeuvres. Leadership Institute alumni will be invited to attend.

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# LEADERSHIP INSTITUTE 2018 COURSE OVERVIEW

Day 5

**WEDNESDAY, APRIL 11**

**8:00 a.m. - 8:30 a.m.  
NETWORKING BREAKFAST**

**8:30 a.m. – 12:30 p.m.  
MANAGING THROUGH INFLUENCE**

As work becomes more complex and collaborative, the ability to build trusting relationships distinguishes those who flourish from those who falter. We are often required to achieve results with groups and individuals well beyond where our formal authority lies. Learn to leverage influence to create more productive and even more enjoyable relationships with your boss, peers and employees.



**Jerry Magar**

**12:30 p.m. - 1:30 p.m.  
LUNCH**

**1:30 p.m. -5:30 p.m.  
MANAGING FOR PERFORMANCE**

The session explores various strategies to evaluate and develop employee, introducing skills in coaching, counseling and methods for motivating non-performers. The session will cover both managing the problem performer and developing the high performer.

**6:00 p.m. - 8:00 p.m.  
NETWORKING DINNER**

Join our host and your classmates for a networking dinner with cocktails and heavy hor d'oeuvres.

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Hosted by

**GT GreenbergTraurig**

# LEADERSHIP INSTITUTE 2018 COURSE OVERVIEW

Day 6

**THURSDAY, APRIL 12**

**7:00 a.m. - 7:30 a.m.  
NETWORKING BREAKFAST**



**Lee Taft**

**7:30 a.m. - 11:30 a.m.  
VALUES-BASED DECISION MAKING**

When things go wrong, you have a choice in how you will respond. As kids, we learned to tell the truth, say we were sorry, and do our best to make things right. As adults, we may have people tell us to defend and deny – advice that often costs us our reputation, our customers, and, worst of all, our integrity. When things go wrong leaders need courage – and a plan. This program offers a step-by-step method that reduces costs, avoids litigation, and preserves relationships.

**11:30 a.m. - 12:30 p.m.  
LUNCH**



**Mickey Quiñones**  
Department Chair &  
O. Paul Corley Distinguished  
Chair in Organizational Behavior

**12:30 p.m. – 3:00 p.m.  
LEADING IN A VUCA WORLD**

Leadership as usual is not enough in a VUCA (Volatile, Uncertain, Chaotic and Ambiguous) world. Leading in a VUCA world not only presents a challenging environment, but also opens the door to an array of new skills that are required to succeed. Leaders and their organizations need to develop the mental capabilities and desire to avoid being left behind.

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# 2018 LEADERSHIP INSTITUTE FACULTY & STAFF

**GAURI BHAT** is an Assistant Professor of Accounting in the Cox School of Business. She has taught financial statement analysis for banks, financial accounting, and management accounting courses at the MBA and undergraduate levels. Before entering academia, Bhat worked as an auditor with KPMG and held a management position in the Corporate Banking Risk Administration Group at Citibank.

**KATE CANALES** is Research Professor and Director of Design and Innovation Programs and serves as Director of the new Master of Arts in Design and Innovation (MADI) program. She oversees the popular Innovation Gymnasium, an engineering facility with a focus on hands-on learning and real-world experience. With a background in mechanical engineering, product design, and design research, Canales studies and teaches the ways we innovate based on human needs and behavior, and is responsible for integrating empathy and creativity into the technical engineering curriculum. She has also worked as a designer and design researcher at IDEO and as a Creative Director at frog design, both internationally recognized leaders in the field of design and innovation.

**JAY CARSON** is an Assistant Professor of Management and Organizations at SMU's Cox School of Business and a CPA. His areas of expertise are in leadership, teamwork, cross-cultural psychology, and organizational behavior. He has worked for and consulted with a variety of organizations, including PriceWaterhouseCoopers and Sonat Marketing and has worked with executive groups at Unilever, Torchmark, Baylor Health, Samson Resources and Pioneer Natural Resources. Carson is a member of the Academy of Management, the Society for Industrial & Organizational Psychology and the International Leadership Association.

**HEMANG DESAI** is the Robert B. Cullum Professor of Accounting and Chairman of the Accounting Department at SMU's Cox School of Business. His interdisciplinary research focuses on Capital Markets-based research in Accounting and Finance. He currently teaches a course on mergers and acquisitions in the MBA program. Desai's papers have been published in top academic journals in finance and accounting as well as top practitioner journals such as *Financial Analysts Journal*. He is the recipient of numerous teaching awards at SMU and has taught custom executive education programs to clients such as Texas Instruments, Lennox International and Weil, Gotshal and Manges. He has also served as a consultant to a variety of clients, including McKinsey and Co., Entergy Corp. and Baker McKenzie.

**JAMES "JIM" S. LINCK** is the Distinguished Chair in Finance at the Cox School of Business at SMU. His research interests include corporate finance, organizations, governance and corporate control. He is well-known for his use of innovative approaches to teaching across a variety of programs, and has received numerous teaching awards, including the Executive MBA Outstanding Professor, the Professional MBA Outstanding Instructor, the Hugh O. Nourse MBA Teacher of the Year and the Finance Professor of the Year, among others. Linck also holds the Chartered Financial Analyst (CFA) and Certified Public Accountant (CPA) certifications. Between his academic years, he held various corporate finance and accounting positions at Intel, NCR/AT&T, and Ernst & Whinney (now Ernst & Young).

# 2018 LEADERSHIP INSTITUTE FACULTY & STAFF

**JERRY MAGAR** serves as Academic Director and lead faculty for several leadership development programs with SMU Executive Education and is the founding director of Organizational Effectiveness with SMU. He is also a founding partner of People Systems Consulting Group, where he works with clients such as: Shell Oil, Dell Computer, JP Morgan Chase, Southwest Airlines, Lucent Technologies and many more. With over 20 years of experience in individual and organizational consulting that combines an educational background in Communication and Organization Development with hands-on business experience in marketing, public relations and business development, Jerry brings a sense of “real world” application to his work.

**MIGUEL “MICKEY” QUIÑONES** is the Department Chair and O. Paul Corley Distinguished Chair in Organizational Behaviour at SMU’s Cox School of Business. He is an internationally recognized expert and well-published author in the areas of individual and organizational development as well as the strategic management of human capital. At Cox, he leads the SMU Cox CEO Sentiment Survey that tracks the state of the Dallas/Fort Worth Area business community through the perspective of local business leaders. He also serves as the academic director of the Latino Leadership Initiative, a partnership between SMU Cox and a number of Fortune 1000 companies whose goal is to identify and develop the next generation of Latino/a leaders. He has received numerous teaching awards and was named the Altshuler Distinguished Teaching Professor in 2014, the highest recognition given at SMU for teaching effectiveness.

**LEE TAFT** is a pioneer in the movement to transform traditional cultural responses to conflict. His scholarship examines the role of apology, forgiveness, and reconciliation in resolving conflict and restoring relationships. He worked as a trial lawyer for twenty years in Dallas and was board certified in both personal injury and civil trial law, but then left his practice to attend Harvard Divinity School, where he wrote a thesis on apology in mediated settings. In 2007, Taft helped the Stanford University hospitals design a program called PEARL, now considered a national model for how hospitals should respond to adverse events in the delivery of care. In addition to hospitals, his clients have included cities, universities and several privately held, values-based companies. In addition to his consulting practice, he guides leaders of values-driven companies in defining, communicating and measuring individual and corporate values. He is also a frequent lecturer and an adjunct professor at the Strauss Institute at Pepperdine University School of Law.

**DON VANDEWALLE** is an Altshuler Distinguished Teaching Professor at SMU, and the past chair of the Management and Organizations Department at the Cox School of Business (2006-2014). His research focuses on feedback, achievement motivation, leadership, and growth mindset theory. His research has been published in leading research journals, including the Journal of Applied Psychology, the Journal of Management, and Personnel Psychology. Four of his international conference papers have won Best Paper Awards from the Academy of Management and the Society for Industrial and Organizational Psychology. Since 2008, Don has taught the first semester organizational behavior course for the Cox EMBA Program, ranked #3 in Bloomberg Businessweek. He is the recipient of numerous teaching awards and was the second Cox professor in the span of a decade inducted into SMU’s Academy of Distinguished Teachers.

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## ABOUT THE TEXAS GENERAL COUNSEL FORUM

The Forum is a community and network of in-house leaders founded in 1998. The Forum strives to be the best at discovering, benchmarking and sharing legal best practices, and delivering them to members in a local, peer-to-peer community. To achieve its mission, the Forum hosts networking and educational events in its Chapter cities: Dallas/Ft. Worth, Houston and Austin/San Antonio.

Join now for 2018 to become a part of our community and network of general counsel and senior managing counsel.

### BENEFITS OF MEMBERSHIP INCLUDE:

#### Legal Best Practice Education & Exchange

- Quarterly Program Events (4 per Chapter)
- Opportunities for Forum members to get complimentary and reduced fee CLE throughout the year
- Complimentary registration for the Annual Conference on Friday, November 16, 2018 in Downtown Austin

#### Networking Opportunities –

- Network and social opportunities at Quarterly meetings, GC Roundtables, Forum Women & After-Hours events
- Invitations to sponsored special events throughout the year
- Eligibility to serve on Chapter committees or the Chapter Board of Directors
- Members-only Membership Directory

Annual membership dues are \$600 for Individual Corporate and \$300 for Individual Non-profit/Government agencies. Legal Department memberships offer the best deal and begin at \$1200 for the general counsel and up to 3 managing counsel. For more information, contact Noelia Saenz, Member Relations Coordinator at (214) 445-9881.

[www.tgcf.org/join-now/](http://www.tgcf.org/join-now/)

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