



Thomson Reuters Legal Executive Institute

presents

**The 21st Annual Law Firm Marketing Partner Forum:
Redefining Client Value in a Competitive & Changing Industry**

**January 22-24, 2014
The Waldorf Astoria
Naples, FL**

Co-Chairs

Eric Chen, *Senior VP, Finance and Special Counsel*, AECOM Technology Corporation
Silvia L. Coulter, *Principal Consultant*, LawVision Group
Dionysia L. Johnson-Massie, *Shareholder*, Littler Mendelson P.C.
Lon Povich, *Executive Vice President, Secretary & General Counsel*, BJ's Wholesale Club
Adam Severson, *Chief Marketing & Business Development Officer*, Baker Donelson

PROGRAM

Day One

Wednesday, January 22, 2014

Pre-Conference Workshops

1:00–2:30PM and 2:45PM–4:15 PM

Come prepared with questions and challenges you face, along with your ideas and input about best practices! These workshops will be offered twice in order to give attendees an option to participate in multiple sessions.

1. The New World of Fee Arrangements

Over the past decade, alternative fee arrangements have grown increasingly popular. Successful firms are those who embrace such changes and work with their clients to achieve cost containment goals. Incorporating AFAs, as well as implementing a cohesive blueprint for best practices, can have its challenges. This session, led by a group of accomplished pricing experts, will discuss various fee arrangement methodologies, tried-and-true process improvement techniques, and invaluable advice on building versatile templates to meet your clients' needs.

Moderator:

John M. Westcott, Jr., *Principal Consultant*, Westcott Legal Consulting, LLC

Presenters:

Nicole M. Beck, *Senior Client Value Pricing Lead*, Reed Smith LLP
Vincent J. Cordo, Jr., *Global Director of Client Value*, Reed Smith LLP
Patrick Johansen, CLM, CPP, *Director of Business Development*, Brinks Gilson & Lione

2. **Achieving Competitive Advantage with Data**

In this era of Big Data, law firms can find themselves drowning in unwieldy amounts of client, market, competitive and industry intelligence. For many firms, learning how to coherently analyze, process, and present this content can provide a strong foundation on which to build effective go-to-market strategies. This session is about providing clarity around the tools you need and the data you gather in order to enhance revenue-generating efforts. Attendees will learn effective ways of disseminating in-house data across numerous platforms, including firm Intranet and the Cloud.

Presenters:

Greg Lambert, *Director of Library & Research Services*, Jackson Walker LLP
Brian Knudsen, *Vice President, Core Large Law Firms*, Thomson Reuters
Jeffrey Ramsey, *Marketing Manager*, Lathrop & Gage LLP

3. **From Sherpa to Guide--Driving Revenue through Sales Coaching**

Law firm business development professionals and marketing partners are increasingly asked to help support senior associate, junior and equity partners' efforts at driving revenue and meeting client needs. This workshop will focus on how to be most effective at in-house coaching and mentorship, and how to sharpen your existing skills as a coach. Key topics include: working with firm financial data and incentives; coaching lawyers to build solid business development habits; creating and using pipeline tools; uncovering obstacles to lawyers' success; communicating your results; and more.

Presenters:

Steven M. Bell, *Chief Client Development Officer*, Womble Carlyle LLP
Craig Brown, *Principal Consultant*, LawVision Group
Silvia L. Coulter, *Principal Consultant*, LawVision Group

Champagne Roundtables
4:30PM – 5:30 PM

1. **Structuring Your Department to Reflect Your Firm's Unique Culture**

There is no "one size fits all" solution for today's law firm marketing and business development departments. In this session, panelists will discuss the choices they've made to build their organization, and what they have learned along the way. Key questions to address include: What does efficiency look like when a department is running at its top level of production? What are the must-haves for a department to produce high-quality work? What can be outsourced and why? What are the reasons various org charts (all reporting to one chief; two distinct groups working collaboratively) work?

Host:

Jennifer Johnson Scalzi, *President*, J. Johnson Executive Search, Inc.

Facilitators:

David Bruns, *Director of Client Services*, Farella Braun & Martel LLP

Louise Muldoon, *North American Business Development Director*, Baker & McKenzie LLC

2. **The Partnership Between Marketing and Technology – Growing an Integrated Strategy**

Outside of partners, technology will continue to play a more significant role than just about any other area of the firm. Whether through corporate websites, CRM, project management and billing software, digital databases, or Pipeline Reports, business development professionals have relied on technology to compete for and retain clients. But for all the attention on technology's *sell-side* value and impact, few if any firms have considered technology's impact from the client—or *buy-side*—perspective. This session focuses on how firms can use digital technology to create a rewarding and endearing client experience. Our expert presenters will explain how websites, blogs, and other social media can be utilized for effective business development. Attendees will discover how to use social media to analyze client behavior, identify trends, and understand ROI.

Host:

John Simpson, *Chief Executive Officer*, One North Interactive

Facilitator:

Clinton P. Gary, *Director of Marketing*, Arnall Golden Gregory LLP

3. **Building Your Sales Team or Building Your Sales Team through New Business Development Solutions**

The law firm sales functions has evolved as more firms are turning to “true” sales and client service professionals to help generate leads, drive revenue and differentiate the firm from its competitors. Join a highly interactive roundtable discussion and learn what other law firms are doing to staff sales teams and create pipelines for sustained growth.

Host:

Jan Anne Dubin, *Principal*, Jan Anne Dubin Consulting

4. **Client Experience: Competing on Service or Using Metrics to Enhance the Client Experience**

It may be all about the client, but what are we doing to enhance the client experience? Are we really on the pathway to creating client experiences or just paying lip service to the concept? Come participate in a discussion on ways firms are focusing on creating, managing and measuring client experiences.

Host:

Catherine McGregor, *Chief of Strategic Development & Partner*, Lawdragon Inc.

Facilitators:

Deborah Farone, *Director of Business Development and Communications*, Cravath, Swaine & Moore LLP

Lesley Wan, *Corporate Real Estate Counsel*, Lloyds Banking Group

5. Managing Partner Roundtable

Managing and Marketing Partners are invited to discuss the challenges they face in today's tumultuous global industry. The dynamics of demanding clients; competitors' grabs for clients and market share, and a changing and mature industry keeps today's managing and marketing partners on their toes. Come prepared with your thoughts, questions and ideas and share insights with your peers and colleagues. This session is for managing and marketing partners only.

Facilitators:

James D. Pagliaro, *Managing Partner, Client Relations*, Morgan, Lewis & Bockius LLP

Paul Steven Singerman, *Co-Chair*, Berger Singerman LLP

Matthew Peters, *Partner & National Leader, Markets*, McCarthy Tétrault LLP

5:30 – 7:00 PM Opening Reception

Day Two

Thursday, January 23, 2014

8:00am – 8:45am Continental Breakfast

8:45am – 8:55am Welcome & Opening Remarks

Brian Knudsen, *Vice President, Core Large Law Firms*, Thomson Reuters

2014 MPF Co-Chairs

Eric Chen, *Senior Vice President, Finance and Special Counsel*, AECOM Technology Corporation

Dionysia L. Johnson-Massie, *Shareholder*, Littler Mendelson P.C.

Lon Povich, *Executive Vice President, Secretary & General Counsel*, BJ's Wholesale Club

Adam Severson, *Chief Marketing & Business Development Officer*, Baker Donelson

**8:55am – 9:45am Legal Industry Trends: What Firms Are Doing Now
2013 Hildebrandt Institute Marketing and Business Development Survey**

This presentation will review the current state of the legal industry and how law firm marketing and business development departments are evolving to confront the ongoing challenges.

Presenters:

Silvia L. Coulter, *Principal Consultant*, LawVision Group

Mark Medice, *Senior Director*, Peer Monitor

9:45am – 10:30am Keynote Presentation: The Experience Economy

Joseph Pine, *Co-Founder*, Strategic Horizons LLP; Best-selling Author of *The Experience Economy* and *Authenticity: What Consumers Really Want*

10:30am – 11:15am Response Panel

Moderator:

Aric Press, *Editor-in-Chief*, ALM

Speakers:

Eric Chen, *Senior VP, Finance and Special Counsel*, AECOM Technology Corporation

Dionysia L. Johnson-Massie, *Shareholder*, Littler Mendelson P.C.

Lon Povich, *Executive Vice President, Secretary & General Counsel*, BJ's Wholesale Club

Adam Severson, *Chief Marketing & Business Development Officer*, Baker Donelson

11:15am – 11:30am Break

11:30am – 12:30pm Driving Value – What Clients Are Doing In-House, and What They Expect from Their Outside Counsel

Not the same old In House panel! Come with your questions and ideas about how inside and outside counsel can better collaborate and make adjustments on both sides to build value-based relationships. Key discussion topics include:

- Reducing cost, improving predictability and achieving better legal outcomes through value initiatives
- Decision-making about who does the work - in-sourcing, off/on-shoring, law firm selection/convergence; on-going work allocation
- Leveraging technology and data analysis, implementing project management and managing workflows
- Challenging the old and bringing in new models: change management - in-house, and in the firms

Moderator:

Catherine Moynihan, *Director of Legal Management Services*, Association of Corporate Counsel

Panelists:

Elisa D. Garcia, *Executive Vice President, General Counsel & Corporate Secretary*, Office Depot, Inc.

Edward P. O’Keefe, *Legal Chief Operating Officer & Deputy General Counsel, Technology, Bank of America Corporation*

Thomas J. Sabatino, Jr., *Executive Vice President - General Counsel, Corporate Secretary, Walgreen Co.*

12:30pm – 1:45pm Luncheon

1:45pm – 2:45pm Discerning Value in Market & Practice Segmentation

What is the value impact of practice segmentation from both a client and firm perspective? Are law firms about to feel the financial effects of over-specialization? Join us as a distinguished panel interrogates the ROI of practice segmentation and specialized pricing and its residual impact on current (and future) firm-client relationships.

Moderator:

Holly Montalvo, *Director, Legal Analytics – Law Firm Segment, TyMetrix*

Speakers:

Robert Burger, *Chief Operating Officer, Sterne, Kessler, Goldstein & Fox P.L.L.C.*

Eric Chen, *Senior Vice President, Finance and Special Counsel, AECOM Technology Corporation*

Paul S. Grabowski, Esq., *Chief Marketing Officer, Bracewell & Giuliani LLP*

Dionysia L. Johnson-Massie, *Shareholder, Littler Mendelson P.C.*

2:45pm – 3:15pm Break

3:15pm – 4:15pm Breakout Sessions

Breakout 1:

Brand Regression - Myth or Reality? How to Succeed in the Current Climate

Branding budgets have been reduced amidst the recession, as business development efforts are now king. But what’s the true cost? For starters, differentiation, core awareness and communication quality responsibilities have been sacrificed. Pioneering branding efforts among law firms have given way to safer, less expensive efforts that suffer from sameness and are easy to ignore.

This show and tell presentation—and interactive CMO discussion—will examine whether firms used to be better at branding; if current efforts seem to be regressing; and how to move from bland to brand.

- Has the recession and other forces led to the wrongful death of law firm advertising?

- What are the leadership challenges of brand parenting in any economy?
- Why are smaller firms delivering more distinct brands?

Moderator/Presenter:

Joe Walsh, *Principal*, Greenfield/Belser Ltd.

Panelists:

Burkey Belser, *President*, Greenfield/Belser Ltd.

Stephanie Goldstein, *Chief Marketing Officer*, Wilmer Cutler Pickering Hale and Dorr LLP

Mark P. Messing, *Chief Marketing Officer*, Duane Morris LLP

Breakout 2:

Building on the Strength of a Sound Lateral Strategy

The trend to hire experienced lawyers will continue to be a strong implementation tactic given most firms' strategies to grow in new markets, new practice areas or both. Based on past failures, firms are sharpening their lateral strategies and have strong hiring and integration initiatives in place to facilitate success. How will firms combat or embrace the "free agent" partner culture and which tactics will insure success for both sides?

Moderator:

Robert A. Shimberg, *Shareholder*, Hill Ward Henderson

Speakers:

Beth Cuzzone, *Director of Client Services & Business Development*, Goultsen & Storrs PC

John H. Banks, *Chief Operating Officer/Chief Financial Officer*, Benesch Friedlander Coplan & Aronoff LLP

Michael E. Hollingsworth II, *Partner*, Nelson Mullins Riley & Scarborough LLP

Breakout 3:

Globalization

Whether your firm is large or small, globalization will have an impact. Clients are global—either through their product distribution, acquisition or organic expansion. How does your firm keep up with the global trend? What are the top considerations when identifying regional opportunities to make informed decisions? How do law departments staff outside the US? And what are firms doing to align in local jurisdictions around the globe?

Moderator:

Carl Anduri, *President*, LexMundi Ltd.

Panelists:

Jaime Carey, *Managing Partner*, Carey

Michael P. Chu, *Shareholder*, Brinks Gilson & Lione

José Eduardo Carneiro Queiroz, *Partner*, Mattos Filho

Andrew Tavi, *Vice President, Legal & Government Affairs, General Counsel*, Nissan North America, Inc.

Breakout 4:

Legal Meets Social Networking: Developing Strategies to Build Brand and Win Clients

A strong reputation is the bread and butter of law firms and their attorneys. In the real world, attorneys know how to demonstrate expertise, make a great impression, and win new business. But marketing online -- especially on LinkedIn -- is frequently a different story: firms lack strong business development strategies, networks aren't robust, profiles are incomplete, and branding is inconsistent. This session will examine how to achieve parity between real-world and online personas.

- Develop strategies to win new business and create a consistent brand presence on social networks like LinkedIn.
- Avoid the unseen online pitfalls that can hurt your reputation and your practice.
- Discover the importance of sharing content, and how to make it fast and easy to do.

Speakers:

Adrian Lürssen, *Co-Founder*, JD Supra

Patrick Baynes, *Co-Founder and VP*, Strategic Partnerships, PeopleLinx

6:00pm – 8:00pm **Networking Reception**

Day Three

Friday, January 24, 2014

8:00am – 8:45am **Continental Breakfast**

8:45am – 9:00am **Opening Remarks**

9:00am – 10:15am **Strategies for Taking Business Development to the Next Level**
This session highlights the strategic initiatives used by firms to help improve the impact of business development campaigns. Concerned with how firms can effectively target new or existing clients, our panel will address how to balance the competing interests of partners, marketing

personnel, and law firm clients in a manner that underscores efficiency, quality, and value.

Moderator:

Elisabet Hardy, *Vice President*, Thomson Reuters Elite

Panelists:

David J. Adams, *Deputy General Counsel, Vice President Regulatory Affairs*, Kaplan, Inc.

Peter Columbus, *Global Director of Business Development and Marketing*, Mayer Brown LLP

Kimberly Johnson, *Chair and Managing Partner*, Quarles & Brady LLP

Paul McCurdy, *Chairman*, Kelley Drye & Warren LLP

Lori Rabinowitz, *Director of Marketing and Recruitment*, Berger Singerman LLP

10:15am – 10:30am Networking Break

10:30am – 11:30am Breakout Sessions

Breakout #1: Best Practices for Communicating Strategies and Initiatives within Your Firm

In an environment where a law firm's communications strategy is inextricably linked to its reputation, effectively managing the message development and delivery channels has never been more complex or important. Hear from a panel of communication experts on how they manage the long term and day-to-day challenges and needs in this complex and evolving area of law firm communications. This session will include a discussion on internal and external communications including message development, targeting constituent audiences, channels options, use of social media, media relations and staffing.

Moderator:

Mark Beese, *President*, Leadership for Lawyers LLC

Panelists:

Jonathan R. Fitzgarrald, *Chief Marketing Officer*, Greenberg Glusker Fields Claman & Machtinger LLP

M. Ashraf Lakhani, *Director of Business Development & Marketing*, Porter Hedges LLP

Pressly ("Press") M. Millen, *Chair, Client Development Committee*, Womble Carlyle Sandridge & Rice, LLP

Breakout #2: Key Client Accounts: Successfully Aligning Clients and Partners

Truly understanding your clients' strategy is an essential step in establishing key client success. Whether through improved client communication or properly aligned partner-client engagement, our select

panel of speakers will address the challenges and demands of retaining key clients and improving overall firm productivity and revenue.

Moderator:

Allen Chichester, *Chief Marketing Officer*, Barnes & Thornburg LLP

Panelists:

J. David Harvey, *Director of Business Development for Litigation and Intellectual Property*, Morrison & Foerster LLP

Timothy M. Lupinacci, *Shareholder*, Baker, Donelson, Bearman, Caldwell & Berkowitz, PC

James D. Pagliaro, *Managing Partner, Client Relations*, Morgan, Lewis & Bockus LLP

Samantha Whitney, *Managing Partner & Co-Founder*, Athena Research Consulting

Breakout #3: Strategic Planning

Is your strategy aligned with your clients' goals? What are the new ingredients for a strategic plan in this mature and ever-changing industry? Come listen as a panel of strategic planning experts discuss the necessary components of a strategic plan: the partners, the clients, the competitors, the business professionals, and the target industry experts.

Moderator:

Marie Lefton, *Principal*, Hoffman Alvary & Company LLC

Panelists:

John Byrne, *Chief Marketing Officer*, Drinker Biddle & Reath LLP

Murray Coffey, *Chief Marketing Officer*, Haynes & Boone

Meredith Mendes, *Executive Director & Chief Operating Officer*, Jenner & Block LLP

11:30am – 11:45am **Networking Break**

11:45am – 1:00pm **The Value of Understanding Your Client's Customers**
Do you understand and build sales strategies around your clients' customers and clients?

Moderators:

Lloyd Johnson, *Publisher and Community Leader*, Inside Counsel

Jan Anne Dubin, *Principal*, Jan Anne Dubin Consulting

Speakers:

David J. Adams, *Deputy General Counsel, Vice President Regulatory Affairs*, Kaplan, Inc.

Dawn Haghghi, *General Counsel*, PCV Murcor Realty Services, Inc.

Lon Povich, *Executive Vice President, Secretary & General Counsel*, BJ's

Wholesale Club

1:00pm

Closing Remarks

Brian Knudsen, *Vice President, Core Large Law Firms*, Thomson Reuters