

2012 COO & CFO Forum
Maintaining Profitability in a Tough Economy:
Understanding the Risks and Finding New Strategies

October 25-26, 2012

Westin Times Square
 New York, NY

Agenda

Thursday, October 25th

8:00 AM – 9:00 AM **Registration and Continental Breakfast**

9:00 AM – 9:15 AM **Welcome and Opening Remarks**

Mike Abbott, Senior Vice President, Hildebrandt Institute

Co-Chairs: *LeeAnn Black*, Chief Operating Officer, Latham & Watkins LLP
Dan DiPietro, Chairman, Citi Private Bank Law Firm Group
James Jones, Senior Fellow, Center for the Study of the Legal Profession, Georgetown University Law Center

9:15 AM – 10:45 AM **State of the Legal Market -- Where We Are and Where We Are Headed**
 The legal market is now in its fourth year of a major economic downturn and, while it appears that the worst may be over, the road to recovery is likely to be long. In this opening session, some of the most experienced observers of the legal market will share their thoughts on where we are and where we're headed, including observations about how the market has changed in the past four years, how firms are dealing with these changes, and how the market is segmenting as some firms prove more successful with their strategies than others.

Moderator: *James Jones*, Senior Fellow, Center for the Study of the Legal Profession, Georgetown University Law Center

Panelists: *Karen Braun*, Co-Executive Director & Chief Marketing Officer, Sullivan & Cromwell LLP
Dan DiPietro, Chairman, Citi Private Bank Law Firm Group
Mark Medice, Senior Director, Peer Monitor
Meredith Mendes, Executive Director & Chief Operating Officer, Jenner & Block LLP

10:45 AM – 11:00 AM **Networking Break**

11:00 AM – 12:30 PM Strategic Risks: How Firms Go Off the Rails

One reality of the new buyer's market for legal services that has emerged in the past four years is the increased risk that law firms face in making key strategic decisions. Simply put, the current highly competitive market is much less forgiving of strategic missteps than the booming seller's market that prevailed prior to 2008. In the past few years, we have seen a number of firms stumble, including a few that have ended up in high profile dissolutions. This session will explore the lessons learned from recent dissolutions and other examples of firms in trouble, including the early warning signs of problems and steps that firms can take to address critical issues before they become serious problems.

Moderator: *LeeAnn Black, Chief Operating Officer, Latham & Watkins LLP*

Panelists: *Gary B. Fiebert, Partner, Smock Law Firm Consultants & Former Executive Director, Schulte Roth & Zabel LLP*
Michael Hersch, Executive Director, Simpson Thacher & Bartlett LLP
Milton C. Regan, Jr., Professor of Law, Georgetown University Law Center

12:30 PM – 1:30 PM Networking Lunch**1:30 PM – 3:00 PM Macroeconomic Risks: Why All Firms Should Care about the Euro and Other Global Financial Crises**

It is often assumed that global macroeconomic issues impact only large multinational law firms or firms with corporate finance or related practices. In this session, macroeconomic experts will describe the direct impact that changes in the world financial markets can have on firms of all sizes in all locations. The session will also include a discussion of steps that firms can take to better prepare for possible adverse impacts.

Moderator/Presenter: *William J. Schomberg, Editor, Americas Economics and Markets, Reuters News*

Panelists: *Bob Bratt, Chief Operating Officer and Executive Director, US Operations, DLA Piper LLP*
Dan DiPietro, Chairman, Citi Private Bank Law Firm Group
Arthur T. Gurwitz, Chief Operating Officer, Proskauer Rose LLP
Stanley Kolodziejczak, Co-Chair Law Firm Services, PricewaterhouseCoopers

3:00 PM – 3:30 PM Break**3:30 PM – 5:00 PM Keynote Presentation and Discussion****Finding New Strategies: Rediscovering the Meaning of Client Service**

In this session, attendees will participate in a case study of a professional service firm focused on rediscovering the meaning of client service as its driving organizational principle. The discussion will consider the strategies available to law firms to improve the quality and consistency of client service and to incentivize and encourage the behaviors necessary to accomplish this result.

Presenter: *Heidi K. Gardner, Assistant Professor of Business Administration, Organizational Behavior Unit, Harvard Business School*

5:00 PM – 6:00 PM Networking Reception

Friday, October 26th

8:00 AM – 9:00 AM Continental Breakfast

Sponsored Breakfast Workshop by Mattern & Associates

What's Hot and What's Not in Legal

In this session, Mattern & Associates presents guest speaker Monica Bay, editor-in-chief Law Technology News, to walk through what every lawyer needs to know and what every lawyer can no longer not know - discussing hot technologies, ethics, and risk management hazard stories straight from the headlines of LTN.

Rob Mattern, President of Mattern & Associates, will then provided a crash course on what every law firm needs to know and can no longer afford to not take action on: the current state of cost recovery. Rob will provide concrete strategies and successful alternative methodologies implemented by AmLaw 200 and 100 firms based upon hot-off-the-presses results of the 2012 Cost Recovery Survey.

Speakers: *Monica Bay, Editor-in-Chief, Law Technology News*
Rob Mattern, President, Mattern & Associates

9:00 AM – 10:30 AM Finding New Strategies: Improving Legal Work Processes

In response to growing client demands for increased efficiency and cost effectiveness in the legal work process, a number of firms have launched innovative initiatives to change the traditional work process through downsourcing, outsourcing, process improvement, project management, and other techniques. In this session, participants will hear what some of the most innovative firms have done and how they might think about work process improvements in their own organizations.

Moderator: *James Jones, Senior Fellow, Center for the Study of the Legal Profession, Georgetown University Law Center*

Panelists: *Stephanie A. "Tess" Blair, Partner, Morgan, Lewis & Bockius LLP*
Sean Whelan, Chief Financial Officer and Nashville Chief Administrative Officer, Pillsbury Winthrop Shaw Pittman LLP
James G. Perkins, PhD, Chief Operating Officer, Procopio, Cory, Hargreaves & Savitch LLP

10:30 AM – 11:00 AM Networking Break

11:00 AM – 12:30 PM Finding New Strategies: Leveraging the Firm's Human Capital

In today's highly competitive market, it is more important than ever that firms think strategically about their greatest asset -- their people. In this session, participants will hear from experts in other professional service businesses how they recruit, develop, and retain the talent they need to be successful. The session will include a discussion of how such techniques might be applied in law firm settings.

Moderator: ***Margaret Poster**, Chief Operating Officer, Willkie Farr & Gallagher LLP*

Panelists: ***Craig R. Gill**, Director, Development Center of Expertise, Deloitte Services LP*

***Scott Westfahl**, Director of Professional Development, Goodwin Procter LLP*

12:30 PM – 12:45 PM **Closing Remarks**