



Thomson Reuters Legal Executive Institute

*presents*

**The 19<sup>th</sup> Annual Law Firm Leaders Forum**  
**The Changing Model:**  
**How the Radical Changes in Legal Service Are Reshaping Law Firm Organization**  
**& Practices**

November 6-7, 2014

The Westin New York at Times Square  
270 West 43<sup>rd</sup> Street  
New York, NY 10036

Co-Chairs

**Ralph Baxter**, *Chairman Emeritus*, Orrick, Herrington & Sutcliffe LLP  
**Bradford W. Hildebrandt**, *Chairman*, Hildebrandt Consulting LLC

Program (all times local)

**Thursday, November 6**

**8:00am - 8:45am**      **Registration and Breakfast**

**8:45am - 9:00am**      **Welcome and Opening Remarks**

*Co-Chairs:*

**Ralph Baxter**, *Chairman Emeritus*, Orrick, Herrington & Sutcliffe LLP  
**Bradford W. Hildebrandt**, *Chairman*, Hildebrandt Consulting LLC

**9:00am - 10:30am**

**The Present and Future Health of the Large Law Firm Model**

The changes underway in the legal marketplace, accelerated by the Great Recession, have already had an impact on the economic performance of large law firms. Are the best days of large law firms behind them? Or are large law firms resilient and agile enough to adapt and continue to flourish? This panel will examine the current state of large law firms, discuss how the dynamics of change are playing out, and consider what lies ahead.

Moderator:

**Bradford W. Hildebrandt**, *Chairman*, Hildebrandt Consulting LLC

Panelists:

**Gregory B. Jordan**, *General Counsel & Head of Regulatory and Government Affairs*, PNC Financial Services Group, Inc.

**Aric Press**, *Senior Vice President & Editor in Chief*, ALM Media Properties, LLC

**Maurice A. Watson**, *Chairman*, Husch Blackwell LLP

**10:30am - 11:00am**

**Break**

**11:00am - 12:30pm**

**The Changing Nature of the Legal Process**

The dynamics of the 21<sup>st</sup> century legal marketplace require and enable legal service to be delivered by different methods and personnel, reducing cost, improving quality, and producing greater job satisfaction among the professionals. This panel, consisting of leaders and entrepreneurs who are driving change both within and from outside the traditional law firm model, will discuss what has happened thus far and what lies ahead in the evolution of legal process design and execution.

Moderator:

**Ralph Baxter**, *Chairman Emeritus*, Orrick, Herrington & Sutcliffe LLP

Panelists:

**Nicholas Bagiatis**, *Chief of Business & Regulatory Department Operations*, Reed Smith LLP

**Raymond E. Bayley**, *Chief Executive Officer*, Novus Law, LLC

**Daniel Lewis**, *Chief Executive Officer and Co-Founder*, Ravel Law

**J. Stephen Poor**, *Chairman*, Seyfarth Shaw LLP

**Thomas G. Trujillo**, *Associate General Counsel, Senior Vice President, Director of Operations*, Bank of America Corporation

**12:30pm - 2:00pm**

**Keynote Luncheon**

**A Conversation about the Impact of the US Midterm Elections**

The US midterm elections on November 4 put into play all 435 seats in the United States House of Representatives and 33 of the 100 seats in the United State Senate. In addition, 38 state and territorial governorships and 46 state legislatures were also on the docket, causing many political observers to view this year's election as a referendum on the actions—or lack thereof—of incumbent Democrats and Republicans. Regardless of outcome, the impact of this election will be a critical factor in President Obama's final two years in office. Join us as our illustrious keynote ponders the repercussions of the midterm elections for Capitol Hill and beyond.

Moderator:

**Andy Sullivan**, *Correspondent & Lead Reporter, Money & Politics Team*, Reuters

Presenter:

**John Dickerson**, *Political Director, CBS News & Chief Political Correspondent*, Slate Magazine

**2:00pm - 3:30pm**

**The Emerging Role of Technology in the Law Firm Model**

Technology will drive many of the most important advances in the delivery of legal service. We are at a relatively early stage of this development, both because the technology is just ramping up for the legal service market, and because lawyers and firms have been relatively slow to adopt new practices. This panel will explore the effects technology has already had on law practice and, more importantly, its potential for enabling further change in the future.

Moderator:

**Ralph Baxter**, *Chairman Emeritus*, Orrick, Herrington & Sutcliffe LLP

Panelists:

**Owen Byrd**, *Chief Evangelist and General Counsel*, Lex Machina

**Ron A. Dolin**, *Research Fellow*, Stanford Law School; *Co-Leader* of Program on Legal Innovation, an interdisciplinary program with the Stanford School of Design

**Scott Ferraiola**, *General Counsel*, IBM Watson

**Daniel Martin Katz**, *Associate Professor of Law*, Michigan State University

**3:30pm - 4:00pm**

**Break**

**4:00pm - 5:30pm**

**The Changing Model for Education, Training and Career Opportunities for Lawyers**

The changes underway in the practice of law have profound implications for the career paths of lawyers, commencing with the way they are educated, the way they are trained, the nature of their work, and the characteristics of their career expectations. Lawyers are expected to think and operate in a far more nuanced and comprehensive capacity than ever before, a fact which calls into question the traditional model of career development championed by academic and professional institutions. This panel examines the desirable and likely changes to lawyer training and professional growth as foretold by prominent law school deans and distinguished law firm chairs from across the country.

Moderator:

**Ralph Baxter**, *Chairman Emeritus*, Orrick, Herrington & Sutcliffe LLP

Panelists:

**Richard R. Hays**, *Chairman & Managing Partner*, Alston & Bird LLP

**Alan C. Michaels**, *Dean and Edwin M. Cooperman Professor of Law*, The Ohio State University Moritz College of Law

**Regina M. Pisa**, *Chairman Emeritus*, Goodwin Procter LLP

**William M. Treanor**, *Executive Vice President & Dean of the Law Center; Professor of Law*, Georgetown University Law Center

**5:30pm – 7:00pm**

**Cocktail Reception**

**Friday, November 7**

**8:00am**

**Breakfast**

**8:30am - 9:30am**

**Executive Breakfast Workshop**

**Critical Strategies for Developing International Opportunities**

Drawing on interviews with over 12,000 senior general counsel worldwide, this workshop will reveal where the greatest international opportunities lie for legal service providers. Attendees will receive practical advice on developing a successful strategy to capture one's share of lucrative international workflows *vis-à-vis* exclusive data and analysis from Sharplegal, Acritas' annual survey of the global legal market. Join this session and take a deep dive into how the needs of in-house counsel differ across markets, what clients mean by value in today's economy, and what they look for when selecting firms for international work. Participants will hear from a firm that has

successfully used an international strategy to drive revenues and profitability, and a leading GC who will share experiences of best and worst practice in delivering to global clients.

Moderator:

**Lisa Hart Shepherd**, *Chief Executive Officer*, Acritas

Panelists:

**Marc Brotman**, *Vice President & Assistant General Counsel; Chief Global Antitrust Counsel*, Pfizer, Inc.

**Roger Meltzer**, *Co-Chairman, Americas & Partner*, DLA Piper

**9:30am - 11:00am**

**Law Firm Dissolutions: Why They Occur and How They Can Be Prevented**

With all of the pressures law firms face in the 21<sup>st</sup> century, we will continue to see some number of firms fail. This session will be based on a case study prepared by the Harvard Law School on the dissolution of the Howrey firm, led by Professor David Wilkins, and will give participants an opportunity for a highly interactive examination of the causes of law firm failures and the steps that might be taken to achieve more positive outcomes.

Leader:

**David B. Wilkins**, *Lester Kissel Professor of Law; Director, Program on the Legal Profession; Vice Dean for Global Initiative on the Legal Profession*, Harvard Law School

**11:00am - 11:30am**

**Break**

**11:30am - 1:00pm**

**Law Firm Mergers: What Law Firm Leaders Should Know**

The challenges facing law firms foreseeably will cause many of them to consider merger as a tactic to develop resources they think necessary to be competitive. This panel, consisting of law firm leaders who have undertaken merger discussions, will explore the specific issues law firms consider in evaluating merger as an option, what factors contribute to successful and unsuccessful merger negotiations, and how firms should approach the prospect of merger as a tactic in their overall strategic plans.

Moderator:

**Bradford W. Hildebrandt**, *Chairman*, Hildebrandt Consulting LLC

Panelists:

**Jerry K. Clements**, *Chair*, Locke Lord LLP

**David Gaulin**, *Partner; Co-Chair of Law Firm Services practice*, PricewaterhouseCoopers LLP

**Andrew G. Humphrey**, *Managing Partner*, Faegre Baker Daniels LLP

**James J. Maiwurm**, *Chair & Global Chief Executive Officer*, Squire Patton Boggs LLP

**Roger Meltzer**, *Co-Chairman, Americas & Partner*, DLA Piper

**William J. Perlstein**, *Partner & Former Co-Managing Partner*, Wilmer Cutler Pickering Hale and Dorr LLP

**1:00pm**

**Closing Remarks**