The Thomson Reuters Legal Executive Institute

presents

The 22nd Annual Law Firm Marketing Partner Forum:

Building Collaborative Strategies Across the Firm and with Clients

January 21-23, 2015
Terranea Resort
Rancho Palos Verdes, CA

Co-Chairs
Silvia L. Coulter, Principal Consultant, LawVision Group
Kimberly Leach Johnson, Partner and Firm Chair, Quarles & Brady LLP
James D. Pagliaro, Lead Partner, Firm Marketing & Business Development, Morgan, Lewis & Bockius LLP
Matthew Peters, Partner & National Leader, Markets, McCarthy Tétrault LLP

PROGRAM (all times local)

Day One
Wednesday, January 21, 2015

Pre-Conference Workshops
1:00pm–2:30pm and 2:45pm–4:15pm

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 Perfect Pitch: Building Effective Strategies for Winning or Retaining Clients
Attend this workshop and hone your business development skills by delivering the perfect pitch for an imaginary legal engagement. Our distinguished panel will offer cogent feedback on how to craft the most compelling presentation possible and build a strong overall relationship with current or prospective clients.

Moderator:
Jan Anne Dubin, Principal, Jan Anne Dubin Consulting

Panelists:
Christopher Lenhart, Senior Vice President & Deputy General Counsel, US Bank
Amy Scowen Walsh, Director, Business Development, Marketing & Communications, Davies Ward Phillips & Vineberg LLP
Gerald C. Wells, General Counsel, Dessange Group – North America
2. **Essential Technologies for Law Firm Business Development**

Legal marketing and business development professionals have access to amazing new tools to find and win business. These technologies are the byproducts of the "social web," "big data" and "mobile" revolutions that are affecting nearly every business. At the same time, there are several market drivers (flat demand for legal services; generational shifts that determine how firms target and engage clients; dwindling budgets) forcing firms to develop business by more sophisticated methods. Legal business developers and marketers now need a high level of technical literacy to stay relevant.

This presentation will:
- Explain the key technologies that are impacting business development
- Provide a framework for how law firms should evaluate technologies
- Provide hands-on experience with several technologies

**Facilitators:**
- **Victoria Spang**, Chief Marketing Officer, Sheppard, Mullin, Richter & Hampton LLP
- **Adam Stock**, Chief Marketing and Client Services Officer, Allen Matkins Leck Gamble Mallory & Natsis LLP

**Commentators:**
- **Janet Bennett**, National Manager, Monitor Suite, Thomson Reuters
- **Peter Ozolin**, Co-Founder, Chief Executive Officer & Chairman, Manzama
- **Joseph Przybyla**, Regional Sales Manager, Elite, Thomson Reuters

3. **Investing in Law Firm Research & Development (R&D) Initiatives**

Ever mindful of the challenges facing similarly large, less agile legal service providers, today’s most forward-thinking firms seek to stay ahead of their peers by investing in research and development. Whether through in-house divisions that analyze data, or a dedicated effort to predict future business development opportunities across the firm, investing in R&D is a key technique essential for long-term success. Join this conversation and discuss how R&D strategy can help promote productivity and innovation at your firm.

**Presenters:**
- **Dr. Evan Parker**, Director, Analytics, Lawyer Metrics
- **Rob Saccone**, Co-Founder, Nexlaw Partners LLC

**Champagne Roundtables**

4:30pm – 5:30pm

Join us for a glass of champagne and lively discussion as we examine five key trends facing the legal industry and marketing professionals in 2015.

1. **Lateral Hiring Strategies Across the Firm**

Amidst the backdrop of client demands and modest economic growth, law firm hiring practices continue to show preference for laterals at both the partner and associate level. This roundtable invites attendees to consider recent data findings and ongoing challenges related to recent lateral hires at major firms. Come hear subject matter experts discuss the effectiveness and value of lateral hiring in the past decade and the various collaborative strategies at one’s disposal intended to promote greater ROI.

**Facilitators:**
- **Howard I. Flack**, Managing Partner of Lateral Hiring & Integration, Hogan Lovells
David R. Maurer, Managing Director – Partner Practice Group, Major, Lindsey & Africa
Christopher Zorn, Liberal Arts Research Professor of Political Science and Sociology, The Pennsylvania State University; Principal, Quantitative Analysis, Lawyer Metrics

2. Forging a Career Across the C-Suite
This roundtable offers a practical discussion about career progression for the law firm CMO. Led by a panel of distinguished leaders who transitioned from the CMO role, this roundtable will offer cogent insight into essential skills and strategic measures for taking the next step in one’s career.

Facilitators:
Amanda K. Brady, Global Practice Leader – Law Firm Management, Major, Lindsey & Africa
Steven R. Petrie, Chief Strategy Officer, Faegre Baker Daniels LLP
Mark Usellis, Chief Strategy Officer, Davis Wright Tremaine LLP

3. Winner Takes All: Building the Ultimate Law Firm Marketing Machine
High performance companies excel in their ability to leverage client insight and deliver a rich, relevant business experience. They demonstrate superior cross-functional collaboration, strategic focus and organizational agility. Yet in many law firms the marketing function is stuck in the past. The tools and strategies that were cutting edge just a few years prior are fast becoming irrelevant, thanks to new ideas evolving every day. Against this fast-moving, high-impact backdrop, what should law firms be doing? How should they be using data to identify client needs, help firms define their next acquisition/merger, set pricing according to industry and market standards and what actions should be taken to convert insight into business development success?

Facilitators:
David Brady, Chief Executive Officer, Vuture
Jeannie Muzinic, Chief Marketing Officer, McDermott Will & Emery
Matthew Parfitt, President, Vulture

4. Marketing & Managing Partner Roundtable
Marketing Partners, Managing Partners, and practice group heads 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.

Host:
Silvia L. Coulter, Principal Consultant, LawVision Group

Facilitators:
Kimberly Leach Johnson, Partner and Firm Chair, Quarles & Brady LLP
David L. Osias, Managing Partner, Allen Matkins Leck Gamble Mallory & Natsis LLP
James D. Pagliaro, Lead Partner, Firm Marketing & Business Development, Morgan, Lewis & Bockius LLP

5:30pm – 7:00pm Opening Night Reception
Day Two  
Thursday, January 22, 2015

8:30am – 9:20am  Continental Breakfast

9:20am – 9:30am  Welcome & Opening Remarks

Mike Abbott, Vice President, Client Management and Thought Leadership, Thomson Reuters

9:30am – 10:45am  Legal Industry Trends: A Data-Driven Dive on Legal Marketing and Business Development Across the Industry
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.

Presenter:
Silvia L. Coulter, Principal Consultant, LawVision Group

10:45am – 11:00am  Break

11:00am – 12:00pm  Keynote Presentation
Predictive Analytics for Marketing: Learning from Data to Predict
Prediction is the holy grail of marketing. Foreseeing each customer purchase, click, and cancellation is the ultimate means to drive more effective, per-customer decisions. And today’s enterprise has a wealth of marketing experience (i.e. data) from which to learn to predict. This learning process is called predictive analytics. In this keynote session, Predictive Analytics author and Predictive Analytics World founder Eric Siegel describes how this technology leverages big data, learning from it in order to drive more effective marketing.

Presenter:
Eric Siegel, Ph.D., Founder, Predictive Analytics World

12:00pm – 1:30pm  Luncheon

1:30pm – 2:45pm  From Origination to Collaboration: Establishing the Right Business Development Culture in Your Firm
An ongoing challenge for managing partners and practice group heads is facilitating stronger bonds between client origination and practice group collaboration—a key step in engaging and retaining clients. This peer-to-peer workshop asks participants to share their challenges and strategic successes in fostering a collegial culture within their practice group or firm.

Moderator:
Cindy Larson, Publisher, Super Lawyers, Thomson Reuters

Panelists:
Jaime Carey, Managing Partner, Carey
Breakout 1: Collaborative Strategies in Cross-Border Marketing: Maximizing Value Through Region-Specific Campaigns

In recent years, the presence of large global law firms in key markets such as Australia and Asia has underscored the significance of cross-border marketing for business development. Indeed, with the legal market still hindered by flat or minimal growth, competing for international clients is a crucial strategy for success. Attend this workshop to hear from experts on how to engage and win local clients through an “authentic” client experience. What does it take to become a go to “local” advisor? What cultural differences are lost in translation?

Facilitators:
J. David Harvey, Director of Global Business Development, Morrison & Foerster LLP
John Hurley, Chief Business Development Officer, DLA Piper LLP
Luis Moreno, Administrative Partner, Mexico City Office, Haynes and Boone, SC
Laurie Robertson, Global Director of Business Development, Marketing & Communications, Baker & McKenzie LLP

Breakout 2: Coaching for Success: Collaboration between Marketing & Professional Development to Deliver Training that Drives Revenue

Few business disciplines have undergone as much change in recent memory as that of marketing and business development. Whereas once hierarchical structures dominated strategy when it came to building an “effective” client development team, nowadays many CMOs realize that functioning in a silo is far less valuable than collaborating across departments. This session will focus specifically on two seemingly disparate departments—professional development and marketing—as a way of demonstrating the impact that collaborative efforts can have on individual attorney business development efforts and overall business growth.

Facilitators:
Andrea Cale, Director, Business Development, Goodwin Procter LLP
Karen L. Febeo, Managing Director, Professional Development & Training, Goodwin Procter LLP
Grant P. Fondo, Partner, Goodwin Procter LLP
Breakout 3:
Advanced Collaboration Strategies Around Pricing
Collaborative strategies in fee arrangements and pricing are steadily gaining traction in leading firms. Many firms are asking their pricing specialists to work hand-in-hand with clients and ensure absolute transparency and open communication. This session highlights the efforts of true thought leaders who have mastered the art of collaborating with clients and quantifying true “value” in the client relationship. Attend this advanced level workshop and discover how to enhance current pricing strategies within your firm.

Facilitators:
Justin Ergler, Director, Alternative Fee Intelligence and Analytics, GlaxoSmithKline
John P. Ferko, Executive Vice President, Practice Management, Pricing & Operations, Miles & Stockbridge P.C.
Peter Lane Secor, Director of Strategic Pricing & Project Management, Pepper Hamilton LLP

Breakout 4:
Strategies in Corporate Communications: Fostering a Collaborative Culture in the Partnership Ranks
No question about it: culture is defined by the leadership of the firm. But if collaboration is a hallmark of the firm’s culture, communications can play a large role in energizing collaboration. This session offers three valuable strategies to help facilitate clear, effective communication and foster creativity between law firm partners. Our presenters will address:

• The Vampire Syndrome: Killing Off Deadly Communications Permanently
  A step-by-step program to remove impediments to collaboration that include dreadful practice descriptions, chilly biographies, pale internal updates and bloodless newsletters

• Beyond the Drum Circle
  Creative ideas that foster and sustain collaboration.

• What's Your Partner's Elevator Pitch?
  How to enable lawyers to “sell” one another through collaborative learning.

Facilitators:
Burkey Belser, President, Greenfield/Belser Ltd.
Robert D. Kubic, Chief Operating Officer, Honigman Miller Schwartz and Cohn LLP
Joe Walsh, Principal, Greenfield/Belser Ltd.

4:15pm – 5:15pm The Inaugural Marketing Partner Forum Mixer

5:15pm – 6:45pm Reception
Day Three  
Friday, January 23, 2015

8:00am – 8:45am  Continental Breakfast

8:45am – 9:00am  Opening Remarks

Mike Abbott, Vice President, Client Management and Thought Leadership, Thomson Reuters

9:00am – 10:15am  The New Competition
This panel will introduce Marketing Partner Forum attendees to the New Competition emerging within Silicon Valley. We will feature a select group of legal start-ups, entrepreneurs, and Stanford University School of Law visionaries as they consider where innovation is taking the legal industry in 2015.

Moderator:  
Jeffrey Litvack, President, Legal Intelligence & Advisory & Chief Digital Officer, ALM

Panelists:  
Catherine Hammack, Founder & Chief Executive Officer, Jurispect  
Daniel Lewis, Co-Founder & Chief Executive Officer, Ravel Law  
Monica Zent, Founder & Chief Executive Officer, Foxwordy

10:15am – 10:30am  Break

10:30am – 11:30am  Breakout Sessions
Join us for three forward-looking sessions that ponder the impact of new competition in the legal marketplace.

Breakout #1:  
Rethinking Service Delivery & Process Engineering in Response to New Competition
With the new competition presenting significant challenges to the legal establishment, the onus falls now on proactive firms to fully research and understand their new competitors. This session offers a deep dive into the business model(s) of the legal New Wave and on response strategies for established firms to confront and secure new business. We will pay particular attention to how firms can rethink service delivery and operations management in order to directly compete with the new competitors’ value proposition and rethink the practice of law.

Facilitators:  
Mark Klender, Principal, Deloitte Consulting LLP  
John E. Murdock III, Partner, Bradley Arant Boult Cummings LLP  
Brad Newman, Attorney, Legal Process and Innovation, Emerging Companies Practice Group, Cooley LLP

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Breakout #2:
Enhancing Client Team Strategy and Culture
The presence of New Competitors belies two cruel truths about the legal market: a) that competition to deliver outstanding client service has never been more imperative and b) that the battle to retain one’s clients requires an unprecedented amount of creativity and collaboration that many firms are simply ill-prepared to handle. This workshop asks participants to examine the shortcomings of their current client team culture and to consider essential steps for taking their client service to the next level.

Facilitators:
James A. Cranston, Principal Consultant, LawVision Group
John Crouch, Director of Growth and Client Development, Bowman and Brooke LLP
Dean Whiteford, Director of Business Development, Inbound Clients, PricewaterhouseCoopers LLP

Breakout #3:
Stormy Weather: The Law Firm Rainmaker Redefined
With a forward-facing eye on market competitiveness and client needs, this breakout discussion features midsize law firm practice group heads and marketing partners to discuss the role of a trusted advisor and the new criteria expected of tomorrow’s top lawyers. Engage this panel to discover key takeaways on preparing firm partners for profound changes ahead.

Moderator:
Robert Alston, Sales Director, Business Development & Expert Services, Thomson Reuters

Facilitators:
Brian L. Davidoff, Partner & Chair, Bankruptcy and Financial Restructuring Group, Greenberg Glusker Fields Claman & Machtinger LLP
Jeffrey G. Frank, Chair, Executive Committee, Foster Pepper PLLC
Jason P. Grunfeld, Client Development Partner, Kleinberg, Kaplan, Wolff & Cohen, P.C.

11:30am – 11:45am  Break

11:45am – 1:00pm  Building a Collaborative Working Model: A Conversation with Corporate Procurement Officers & General Counsel
As corporate mandates on legal spend continue to impact law firm-client relationships, the role of the corporate procurement officer has never been more paramount. This earnest conversation addresses two main questions: How are corporate procurement officers sourcing and evaluating legal counsel? And what strategies or initiatives can both sides adopt in order to foster a mutually beneficial client/law firm “partnership”?

Moderator:
Bernadette Bulacan, Director, Market Development, Thomson Reuters

Panelists:
William Barthell, Senior Director, Legal, Symantec Corporation
Matthew Fawcett, Senior Vice President, General Counsel & Secretary, NetApp Inc.
Daniel H. Weintraub, General Counsel & Managing Director, Audax Group

1:00pm  Closing Remarks

Mike Abbott, Vice President, Client Management and Thought Leadership, Thomson Reuters