20th ANNUAL MARKETING PARTNER FORUM
Growing Your Business in a Flat & Changing Market
January 16-18, 2013
Los Angeles, CA

WEDNESDAY, JANUARY 16, 2013
1:00-4:00 PM Pre-Conference Workshops

WORKSHOP 1: 360° View of Key Client Programs and Cross-Selling

Many firms are several years into their Key Client Programs while others are just beginning. This interactive workshop will take a 360° view of the opportunities and challenges of Key Client Programs and Cross-Selling. Hear how a “Key Client” receives the overtures and offers from various firms; hear from a “Partner” who acts as a Team Leader and Team Member; and hear from business development professionals who lead the initiatives within their firms. This workshop will discuss: Strategizing to build an effective client team; engaging your colleague lawyers to participate; approaching your clients in the right way; utilizing firm’s value added tools to strengthen your relationship; incenting team communication, behavior and follow up and involving marketing & business development Professional in the process.

Moderator: Adam Severson, Chief Marketing & Business Development Officer, Baker, Donelson, Bearman, Caldwell & Berkowitz, PC

Speakers: Christopher T. Lenhart, Sr. Vice President & Associate General Counsel, U.S. Bank
Jeanne Hammerstrom, Chief Marketing & Recruiting Officer, Benesch, Friedlander, Coplan, & Arnoff, LLP

WORKSHOP 2: Competitive Market Industry Intelligence

Truly knowing the environment and market you operate in is necessary to support your firm’s leaders in making strategic decisions. Gathering facts and figures, early identification of opportunities and risks and converting and analyzing this data into usable information is key to gaining an edge over your competition. But how do you set this up in your firm to be effective and efficient? This workshop will discuss: What is effective? How do you put intelligence together that is meaningful and succinct? What’s information is out there that firms are using? How do you build an intelligence platform in your firm?

Speakers: Greg Lambert, Director of Library & Research Services, Jackson Walker L.L.P.
Jeffrey Ramsey, Marketing Manager, Lathrop & Gage LLP
WORKSHOP 3: The Changing Role of the Managing Partner/Marketing Partner

The evolving and mature legal industry continue to challenge managing and marketing partners who must lead versus manage and must dare to try strategies that will differentiate their firms and place them in a leading market position. This workshop will address the evolving role of marketing partner and different approaches towards making the position effective and fulfilling. Using a roundtable format, the session will focus on trends and best practices, the future role of managing partners and marketing partners overseeing the BD process, leadership and messaging.

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

Speakers: Debora de Hoyos, Partner, Mayer Brown LLP
James J. McDonald Jr., Marketing Partner, Fisher & Phillips LLP
Douglas J. Sorocco, Director & Shareholder, Dunlap Codding P.C.
Steve Smith, Managing Partner, Greenberg Glusker

4:30–6:00 PM CMO/CSO, Marketing Partner and Managing Partner Roundtables

These intimate, peer-to-peer roundtables offer marketing leaders a prime networking opportunity. Exchange ideas and business cards, discuss common problems, and work together to develop solutions.

- Roundtable 1 – Practice and Industry Group Planning: Revamping Your Go-to-Market Strategy
  - Facilitator: Mark Beese, President, Leadership for Lawyers llc
- Roundtable 2 – Integrating Marketing and Business Development for the Mid-size Firm: The New Organization
  - Facilitator: David Bruns, Director of Client Service, Farella Braun + Martel LLP
- Roundtable 3 - Change to Corporate Social Responsibility
  - Facilitator: Theresa Harrison, Pro Bono Project Manager – Marketing, Strategy, Business Development
- Roundtable 4 – Building Your Sales Team
  - Facilitator: Mike Krenn, Chief Marketing Officer, Procopio, Cory, Hargreaves & Savitch LLP
- Roundtable 5 – Client Experience: Competing on Service
  - Co-Facilitator: Jan Anne Dubin, Principal, Jan Anne Dubin Consulting

6:00-7:30 PM Opening Reception

THURSDAY AGENDA, JANUARY 17, 2013
GENERAL SESSION & BREAK-OUTS

8:00–8:45 AM Continental Breakfast

8:45–8:55 AM Welcome & Opening Remarks
2013 MPF CO-CHAIRS

Silvia L. Coulter, Principal Consultant, Client Development Practice, LawVision Group
Karim Klaus Emara, Global Director of Business Development and Marketing, Clifford Chance LLP
Debora de Hoyos, Partner, Mayer Brown LLP
William B. Sailer, Senior Vice President, Legal Counsel, QUALCOMM, Inc.

8:55-9:45 AM  Legal Industry Trends: What Firms Are Doing Now
2012 Hildebrandt Institute Marketing and Business Development Survey

With the impact of the economic downturn entering its fourth year, most law firm leaders are confronting a radically changed environment in today’s legal market. For those firms looking to deepen or enhance their market positions, the challenges are more daunting than ever before. Yet for firms that are prepared to think creatively, that remain open to innovation, and that are willing to take some risks, the present market environment offers great potential opportunity. 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, Client Development Practice, LawVision Group
Mark Medice, Senior Director, Hildebrandt Institute

9:45-10:30 AM  Keynote Presentation

The Smarter Legal Model: Replacing the Traditional Zero-Sum Game Client Relationship with a Profitable Partnership

Trevor Faure, Global Leader & Partner, Legal Services, Ernst & Young Global

The Smarter Legal Model applies world-class business and behavioral principles such as six sigma, Pareto optimal and neuro-linguistic programming to the practice of law for the first time with tangible results. These methodologies have been applied on a multi-million dollar scale and proven to improve both compliance and client satisfaction and to increase legal output without increasing cost or headcount.

A key element of the Model is the reversal of law firm-client tension, now heightened by economic globalization and the increasing commoditization of legal work. Faure identifies inherent dysfunctionalities in the law firm-client relationship and demonstrates how the parties can structure a modern, mutually-profitable relationship, both behaviorally and financially.

10:30 – 11:15  Response Panel

Following Trevor Faure’s keynote address, our panel of partners, marketing and in-house voices lead by Aric Press, Editor-in-Chief of ALM will discuss candid responses to the lessons shared. Will law firms heed those lessons? Why? And why not?

Moderator:  Aric Press, Editor-in-Chief, ALM
Speakers:  

Karim Klaus Emara, Global Director of Business Development and Marketing, Clifford Chance LLP  
Debora de Hoyos, Partner, Mayer Brown LLP  
William B. Sailer, Senior Vice President, Legal Counsel, QUALCOMM, Inc.

11:15-11:30  Networking Break

11:30 AM-12:30 PM  The Asia-Pacific Market Update: A Look Ahead to the Challenges and Opportunities in 2013 and Beyond

While many firms are looking at the Asia-Pacific market as an area of growth and expansion, this panel will discuss what practicing law and running a law firm in the region looks like in today’s economic environment, challenges you are likely to face and keys factors for business development success in the region. The panel will address current market conditions in the PRC and Hong Kong, Korea, Singapore, Japan and other countries in the region and how the changing landscape needs to affect your overall strategy; how to identify markets, practices and focus your spend; how to adapt to regulatory, economic, political and cultural conditions; and the importance of being nimble.

Moderators:  
Randy J. Aliment, Partner, Williams Kastner LLP

Speakers:  
Michael Chu, Shareholder, Brinks Hofer Gilson & Lione  
Sandra Ravich McCandless, Partner, SNR Denton US LLP  
William E. Wegner, Partner, Gibson, Dunn & Crutcher LLP  
Changchun Yuan, Partner, Broad & Bright

12:30 PM – 1:45PM  Lunch

1:45 - 3:15 PM  Fair Exchange of Value – Are Law Firms Charging Too Much or Delivering Too Little?

Demonstrating the value of legal spend continues to be at the top of General Counsels’ agenda. In turn, leading law firms will need to demonstrate the value they create during and after each matter. Typically, although all seen as expensive, top tier firms are perceived as worth paying a premium for by clients not prepared to compromise when risks and opportunities are at stake. But, how long will this continue? In this session, the panel will jointly address:

- The increasing pressures on General Counsel and law firm to find and demonstrate value  
- Alternative pricing arrangements and how they are actually used  
- The power of procurement  
- The reality behind off-shoring, Legal Process Outsourcing (LPO), or any other alternatives to the current associate-partner model.

Moderator:  
Karim Klaus Emara, Global Director of Business Development and Marketing, Clifford Chance LLP
Speakers: *Janice L. Block*, General Counsel & EVP, Kaplan, Inc.  
*Thomas W. Baldwin*, Chief Knowledge Officer, Reed Smith LLP  
*William B. Sailer*, Senior Vice President, Legal Counsel, QUALCOMM, Inc.  
*Florie Perellis*, Chief Litigation Counsel, Allstate

3:15-3:45 PM  Networking Break

3:45-5:15 PM  Breakout Sessions

BREAKOUT 1: Metrics that Matter

Savvy business development and marketing leaders inherently understand that they need to measure their impact and be accountable for the overall expenditure. This often translates to measuring what can be measured – number of events, press mentions, website page views, email opens, pitches, RFPs and so on. Important as these metrics are, they don’t draw a connection to the hard business metrics of pipeline, revenue and profit. The focus on marketing activity versus results does little to help answer the question of "what do we expect to get as a return on the marketing and BD investment?" The ability to identify which parts of your marketing delivers financial results will mean you are better positioned to make the strategic decisions about which areas of your marketing mix to invest in and where to make hard strategic choices about funding to improve results over time. This session will discuss:

- Measuring the impact of your programs on incremental revenue and profit
- Defining the most important metrics
- Communicating business development results with your executive team and board to build credibility.

Moderator: *Jodie Collins*, Senior Director, Business Development & Marketing, Manatt, Phelps & Philip, LLP

Speakers: *Steven Petrie*, Chief Strategy Officer, Faegre Baker Daniels LLP  
*Craig Raeburn, Jr.*, Managing Director, Legal Analytics, TyMetrix

BREAKOUT 2: Laterals: Beyond Integration

Laterals come in all forms, from the long-term partner with the big book of business to the partner who is on his/her third or fourth firm. Many firms have been disappointed with their laterals and others have had great success. Making sure that these new hires fit into your firm culture and positively impact your bottom line is a key challenge that is faced by marketing and business development teams. This session will discuss:

- Lateral hire proliferation and impact across firm
- Focus not only on rainmakers, but teams and practices
- Building a strategy around institutionalizing clients
- Cross-Selling
Moderator: **Beth Cuzzone**, Director of Client Services & Business Development, Goulston Storrs

Speakers: **Carmine Zarlenga**, Partner, Mayer Brown LLP  
Daniel H. Weintraub, General Counsel and Managing Director, Audax Management Company LLC

BREAKOUT 3: Technology Applications That Can Make a Difference

Technology will continue to play a very critical role to help shape the maturing legal landscape. Technology plays a key role in shaping a firm’s competitive advantage. How well is your firm doing in this area and to what extent is marketing and business development aligning with the technology team to support firm strategy and meet client demands? This session will focus on the tools that are available to aid in marketing and business development, to engage partners to effectively use the resources and to support key service strategies and the resources in which firms must invest to stay current and competitive.

Moderator: **Jan Anne Dubin**

Speakers: **Suzanne Donnels**, Chief Marketing Officer, Jenner & Block LLP  
**Melissa Ertek**, Director of Client Service Programs, Pillsbury Winthrop Shaw Pittman LLP  
**Joe Przybyla**, Senior Manager of Business Development Operations, Thomson Reuters Elite  
**Richard Westle**, Managing Director, ANSOR Software and Kraft & Kennedy, Inc.

6:00-8:00 PM Networking Reception

FRIDAY AGENDA, JANUARY 18, 2013
GENERAL SESSION & BREAK-OUTS

8:00 AM Continental Breakfast Opens

8:45 AM Welcome Remarks

9:00-10:15 AM The Evolving Market and What it Means to Law Firms and Practice

Although many aspects of a corporate legal practice are eternal, individual areas of law do heat up and cool down. A practice’s popularity – and its potential to produce revenue for the firm – varies according to economic cycles, regulatory changes and legal innovation. This session explores how firms and their clients can anticipate and respond proactively to new and changing legal needs and practices and addresses:

- Hot new emerging practice areas and markets
- How corporations identify new and changing legal needs
- The power of being first-to-market in an emerging area of law
- Success stories about how firms find and develop new markets through marketing and BD initiatives
- Replicable and scalable market analysis and intelligence models and processes
Moderator: Ann Lee Gibson, Principal, Ann Lee Gibson Consulting

Speakers: Suzanne Donnels, Chief Marketing Officer, Jenner & Block LLP
Rita Tuzon, Executive Vice President and General Counsel, Fox Networks Group

10:15-10:30 AM Networking Break

10:30-11:30 am Breakout Sessions

BREAKOUT 1: Business Development Staffing and Structure to Meet the Changing Market

The rapid deployment of individuals with business development skills within law firms is unprecedented. Over the past four years, a challenging economy and an extremely competitive market has caused many firms to re-think their marketing and business development organizations. This panel of senior leaders will discuss organizational structures to support the firm as it meets the changing market dynamics.

Moderator: Jim Cranston, Principal Consultant, Client Development Practice, LawVision Group

Speakers: Andrew Murray Brown, Chief Business Development Officer, Ropes & Gray LLP
John R. Neidecker, Chief Client Development Officer, Edwards Wildman Palmer LLP
Melanie Zaletsky, Head of Business Development, Hogan Lovells US LLP

BREAKOUT 2: “The Only 5 Marketing Challenges You Have”

Your job comes at you so hard and fast, you may lose sight of why you’re a marketer. It’s certainly not to answer proposal requests! There are actually only five challenges a marketer really faces. They are to: enhance the firm wide brand; celebrate new arrivals; launch a service line or raise awareness of a service line; penetrate a new industry or drive growth in an industry; and launch a new office or draw attention to an office or region. Drive revenue? Of course; that’s the uber goal. But how abstract is that? Get off the treadmill, let go of the diddly stuff and get back to your passion. Come away with a strategic perspective, tactical checklists and inspiring examples of others who have succeeded.

Moderator: Burkey Belser, President and Creative Director, Greenfield/Belser Ltd.

Speakers: Jann Dudley, Marketing Director, Archer Norris PLC
Clare Grossman, Marketing Director, Jackson Lewis LLP
Clinton Gary, Director of Marketing, Arnall Golden Gregory LLP

BREAKOUT 3: Inside/Outside Counsel Perspectives on Making Fixed Fee Arrangements Work

With clients asking for deep discounts and flat rates, we all know that mixed fee arrangements are here to stay, but what does it really take to make these arrangements work? Hear from our panel of partners, marketing professionals and in-house counsel on what has worked and what has not.

Moderator: Cathleen Flahardy, Editor-in-Chief, InsideCounsel
General Counsel face continuing internal pressures to control cost while coping with growing demands for legal advice. In a panel organized by the Association of Corporate Counsel, you will hear how experienced law department leaders respond to this pressure and what it means both for their department operations and the law firms they retain. Topics of discussion will include:

- What "value" means to in-house counsel and how can firms add value to their relationships with in-house counsel
- Management practices to control spending, including use of value-based fees, project management, etc.
- A day in the life of a General Counsel: what is changing and what techniques are they finding effective to cope with those changes
- What makes up the bulk of in-house costs and what are General Counsel getting the most pushback on?
- What type of training opportunities are legal departments looking for for professional development?

Moderator: Veta Richardson, President & Chief Executive Officer, Association of Corporate Counsel

Speakers: Jonathan Block, Vice President and General Counsel, Hot Topic, inc.
Thomas Sabatino, Executive Vice President, General Counsel and Corporate Secretary, Walgreen Co.
Teigue Thomas, Vice President, General Counsel and Corporate Secretary, Acer/Gateway Computers

1:00-1:30 PM Closing Remarks