



THOMSON REUTERS™

LEGAL EXECUTIVE INSTITUTE

The Thomson Reuters Legal Executive Institute

proudly presents

The 25th Annual Law Firm Marketing Partner Forum
Driving Revenue through Business Intelligence

January 24-26, 2018

Terranea Resort
Rancho Palos Verdes, CA

Co-Chairs

Silvia L. Coulter, *Principal*, LawVision Group, LLC
Beth Cuzzone, *Chief Business Growth Officer*, Goulston & Storrs PC
Samir A. Gandhi, *Partner & Co-Chair, Marketing and Practice Development*, Sidley Austin LLP
Mark Usellis, *Chief Strategy Officer*, Davis Wright Tremaine LLP

PROGRAM (all times local)

Day One

Wednesday, January 24, 2018

12:00pm – 1:00pm Registration & Welcome Luncheon

Wednesday 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. Aligning the Stars: Collaborative Management Strategies in Lawyer Compensation**
Lawyer compensation systems remain a delicate issue for many law firm executives. Despite acknowledging the new realities of a transformed legal market, the internal culture within many firms remains grounded in an eat-what-you-kill mentality brought about by years of professional solipsism. Convinced that a more collaborative managerial approach is required to better align and recalibrate compensation systems, this workshop asks participants to address a number of critical questions:
 - How are firmwide compensation systems designed and aligned with greater cultural and strategic goals?
 - To what extent is compensation tethered to a healthy business development culture?
 - What role does “teamwork” play in your firm’s compensation system? How is it assessed and evaluated?
 - How does your compensation system balance firm success with individual performance?

- How do you align your associate compensation with partner compensation? Does your associate compensation approach help facilitate the path to partnership?

Moderator:

Bruce MacEwen, *President*, Adam Smith, Esq.

Facilitators:

Jason P. Grunfeld, *Partner & Head of Business Development*, Kleinberg, Kaplan, Wolff & Cohen, P.C.

J. Stephen Poor, *Partner & Chair Emeritus*, Seyfarth Shaw LLP

2. **Metrics that Matter: A Law Firm Management Workshop**

In a rapidly segmenting legal market, data analytics and business intelligence have never been more paramount. Tasked with defining and executing overall business strategy, law firm officers must make challenging decisions requiring actionable insight and visibility through data. This interactive workshop examines key metrical levers for evaluating law firm performance. Led by some of the industry's shrewdest minds, participants will gain comprehensive knowledge of which metrics truly matter from a business development & marketing standpoint. Other topical discussions include:

- How to deploy financial analysis to fashion the most competitive service model;
- How to measure real "profit" and identify key drivers of change;
- How to establish an enterprise culture that embraces data analytics;
- How to broaden the concept of "leverage" to include technology and other 21st century resources.

Facilitators:

Dr. Evan Parker, *Managing Director, Analytics & Research*, LawyerMetrix

Steven R. Petrie, *Chief Strategy Officer*, Faegre Baker Daniels LLP

Jill Weber, *Chief Marketing & Business Development Officer*, Stinson Leonard Street LLP

3. **Mind the Gap: Mastering Partner Succession Planning & Practice Group Transitions**

For law firm executives and legal clients, transitioning practice group heads or relationship partners can cause significant headaches. Challenges arise around preserving client interests, educating colleagues, managing communications, or seamlessly re-distributing large books of business. Elaborating upon takeaways from last year's Forum, this workshop offers essential advice on:

- How to start the dialogue with a senior, obstinate, or underperforming partner;
- How to assess and vet competencies in a potential successor;
- How to design and executive effective strategies for reinforcing client relationships and business development throughout transition;
- How to transform fractious firm culture into a cohesive enterprise

Moderator:

Janet Stanton, *Partner*, Adam Smith, Esq.

Facilitators:

Elizabeth Sharrer, *Partner & Firm Chair*, Holland & Hart LLP

Lisa Simon, *Chief Marketing & Business Development Officer*, Lewis Roca Rothgerber Christie LLP

Mark Usellis, *Chief Strategy Officer*, Davis Wright Tremaine LLP

4:15 pm – 4:45pm

Break

Champagne Breakouts
4:45pm – 5:45pm

Join us for a glass of champagne and three lively discussions on various strategic developments impacting the legal industry.

Breakout #1:

Strange Bedfellows: Examining Law Firm Business Development Strategy Around Alternative Legal Service Providers

With alternative legal service providers (ALSPs) accounting for over \$1 billion in market share on a global scale, it is safe to say that the legal industry's newest entrants are more than a passing fad. Offering a wide array of low-cost legal services to both corporate and law firm clientele, ALSPs herald an exciting opportunity around which to build a novel business development strategy. Beginning with a glimpse at some of the most innovative partnerships in the market, this roundtable asks participants to debate how best to view ALSPs in the quest for profitability.

Facilitators:

William Josten, *Manager, Thought Leadership Platforms, Leadership*, Thomson Reuters Legal Executive Institute

John Sterling, *Chief Marketing Officer*, Sterne, Kessler, Goldstein & Fox PLLC

Breakout #2:

Globalization or Glocalization? Cross-Border Marketing in Uncertain Times

Over the past decade, globalization's impact on legal services has forced law firms and their clients to view legal matters through a diffuse, complex, and largely transnational lens—a condition brought about, so claims Harvard Law Professor David B. Wilkins, by the confluence of more interconnected economic activity and the mass proliferation of knowledge *vis-à-vis* brilliant or exponential technologies. Ours is now a liminal vista wherein BigLaw's supposed "demise" and newly-empowered legal clients tango in delicate tension, thus drawing law firm differentiation to the fore. In these uncertain times, a key question for firms is whether or not cross-border marketing should occur as a more global or "glocal" endeavor? Put differently, is it more prudent for law firms to invest in localizing their services or operate as a single, centralized entity?

Facilitators:

Terri Gavulic, *Executive Director*, TerraLex

Paul S. Grabowski, *Chief Marketing Officer*, Bracewell LLP

Alex Oh, *Partner, Technology & Intellectual Property Group*, Stoel Rives LLP

Breakout #3:

The New Responsibilities of the Relationship Partner: A Law Firm Partner Roundtable

In a fiercely competitive legal services market, the prowess of a law firm relationship partner has never been more paramount. Indeed, with law firms clients having greater options to choose from when soliciting outside counsel, the ability of the relationship partner to establish, maintain, or augment client engagement is crucial to winning new business. This roundtable invites participants to discuss best practices and frequent challenges involving the relationship partner at both large and small law firms.

Moderator:

Samir A. Gandhi, *Partner & Co-Chair, Marketing and Practice Development*, Sidley Austin LLP

Facilitators:

Joshua M. Davis, *Director & Business Development Co-Chair*, Goulston & Storrs PC

5:45pm – 7:00pm Opening Night Reception

Day Two

Thursday, January 25, 2018

8:30am – 9:20am Networking Breakfast

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

9:30am – 10:30am The 2018 Annual Marketing Partner Forum Survey: A Data-Driven Dive on Legal Marketing and Business Development Across the Industry
This presentation will share findings from the annual Marketing Partner Forum attendee survey and offer cogent analysis of the current state of the legal industry.

Presenters:

Steven R. Petrie, *Chief Strategy Officer*, Faegre Baker Daniels LLP
Silvia L. Coulter, *Principal*, LawVision Group, LLC

10:30am – 10:45am Morning Break

10:45am – 12:00pm A Law Firm Performance Report Card: Client-Driven Metrics & KPI in the Modern Corporate Legal Department
Today's legal clients are growing ever more sophisticated in their data analytics capabilities. Indeed, with so much pressure on corporate legal departments to manage costs and keep work in-house, the embrace and mass appeal of third party platforms capable of measuring outside legal spend is significantly impacting law firm business development and profitability. This session examines the latest data and technologies deployed by clients in such areas as e-billing, matter level management, and beyond. Our panel will offer insight into what clients look for when evaluating outside counsel, as well as the various ways leading law firms have responded to such assessments at both a relationship and strategic level.

Moderator:

Samir A. Bhavsar, *Partner & Deputy Department Chair, Intellectual Property*, Baker Botts LLP

Panelists:

F. Samuel Eberts III, *Chief Legal Officer, Corporate Secretary & Senior Vice President of Corporate Affairs*, Laboratory Corporate of America Holdings
Joseph H. Otterstetter, *Managing Counsel & Associate General Counsel*, 3M
Neil Rosolinsky, *Executive Vice President & Deputy General Counsel, Litigation & Employment*, Citizens Financial Group, Inc.

12:00pm – 1:15pm Networking Luncheon

1:15pm – 2:30pm

Breakout Discussions

Join us for three simultaneous discussions on timely topics for the 2018 calendar year.

Breakout #1:

Lost in Translation: Coaching & Strategic Planning Around the New Legal Buyer

The changing face and business models of legal clients continues to put pressure on the way law firms approach and solicit new business. Thanks to myriad technological breakthroughs and marked shifts in how corporate clients are approaching legal service, many law firm partners—despite years of success—continue to express doubts about how best to approach the new legal buyer. This session introduces participants to a diverse panel of in-house talent and solicits best practices and collaborative strategies on coaching and bolstering the law firm-client relationship.

Moderator:

Kristin Calve, *Publisher*, Metropolitan Corporate Counsel; *Co-Founder*, Law Business Media

Panelists:

Clifford G. Barr, *Associate General Counsel – Legal Operations*, Andeavor
Linda T. Gibson, *Executive Vice President & Head of Global Distribution*, Old Mutual Asset Management (OMAM)

Breakout #2:

The Market Settling: Assessing Strategic & Profitability Measures in Practice Specialization & Segmentation

In the ten years since the Great Recession, practice segmentation and specialization have garnered significant interest within the profession. Decisions by firms to maintain or adopt a “best in breed” model have yielded uneven results, with several enjoying robust profits, often at the expense of others. Leveraging the expertise of a panel of accomplished industry veterans, this session examines profitability and ROI behind business strategy within professional services firms. How has practice specialization affected value from a client and firm perspective? What lessons can law firms deploy from their professional services peers in order to be competitive for the long haul?

Moderator:

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

Panelists:

Nathan A. Darling, *Chief Business Development & Marketing Officer*, Beveridge & Diamond, P.C.

Mark Klender, *Principal, Strategy & Operations and Service Delivery Transformation*, Deloitte Consulting

Tim Mohan, *Chief Executive Partner*, Chapman and Cutler LLP

Breakout #3:

Advancing Collaboration: Integrating Legal Project Management in Firmwide Business Development

The incorporation of legal project management (LPM) into business

development and marketing programs is part of the evolution of more client centric efforts in legal services. Some of the nation's most progressive firms have succeeded in fully leveraging LPM resources in ways few may have previously imagined. In this discussion, participants will hear practical case studies on how marketing and business development (BD) teams are working together with LPM professionals. Interactive exercises will be utilized to illustrate the application of LPM to BD roles and more broadly. In the process, you will find exciting opportunities to improve the tangible ROI in another facet of the legal client journey.

Moderator:

Susan Raridon Lambreth, *Principal*, LawVision Group LLC

Facilitators:

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

Katherine D'Urso, *Chief Client Development Officer*, Wilmer Cutler Pickering Hale and Dorr LLP

David McClune, *Chief Marketing Officer*, Shearman & Sterling LLP

2:30pm – 2:45pm

Afternoon Break

2:45pm – 4:00pm

Signs Taken for Wonders: Evolving Law Firm Data-Driven Strategies in Profitability, Performance and Practice

In 2018, the existence of data analytics professionals and lawyer-scientists at some of the nation's most progressive firms reflects the paradigm shift currently roiling much of the AmLaw 200. Thanks to a dramatic influx of technology and talent, leading firms are exploring once-fantastic possibilities around predictive analytics, practice management and improved service delivery—a reality far too often confused with visions of robot lawyers. This panel welcomes some of North America's most imaginative firms for a comprehensive take on the state of data analytics capabilities today. Our panel will offer concrete examples of how their firms are marrying business intelligence with key initiatives such as client service, business development, talent management and more.

Moderator:

Jennifer Roberts, *Data Scientist*, Intapp, Inc.

Panelists:

Bennett B. Borden, *Partner & Chief Data Scientist*, Drinker Biddle & Reath LLP

Dr. Andrew Duchon, *Data Scientist*, Manzama

Dr. Zev J. Eigen, *Global Director of Data Analytics*, Littler Mendelson P.C.

Kimberly Leach Johnson, *Partner & Firm Chair*, Quarles & Brady LLP

Timothy Murphy, *Partner & Co-Chair, Aboriginal, Government Relations, Project Finance, Infrastructure & Energy*, McMillan LLP

4:00pm – 4:15pm

Break

4:15pm – 5:15pm

Special Interest Roundtables

Please join us for four simultaneous roundtables designed for senior law firm business development personnel.

Roundtable 1:

Perchance to Dream: Lawyering & the Wellness Imperative

A recent study of white collar professionals concluded that lawyers, in addition to scoring lower than ever other profession in terms of health and overall wellbeing, have the highest rate of alcohol and substance abuse on a global scale. Given the high stress environment facing most lawyers, such findings seem par for the course. But perhaps a more intriguing question is how much productivity—and, by extension, *profitability*—is lost when lawyers fail to account for their health? This roundtable examines the growing imperative of wellness initiatives at law firms around the world. Participants are asked to discuss how integrating health and wellbeing programs can be an effective (and measurable) business development strategy.

Moderator:

Nicole DuPont Latimer, *Chief Executive Officer*, StayWell

Facilitators:

Laura Shumiloff, *Global Director of Marketing & Communications*, Norton Rose Fulbright

Lisa Smith, *Deputy Executive Director & Director of Client Relations*, Patterson Belknap Webb & Tyler LLP

Roundtable 2:

Closing the Gap: Leveraging the Multi-Generational Law Firm Workforce

Three generations in the workforce create a host of challenges and opportunities for legal professions and firms. From client development and service to leadership and recruiting, this roundtable will offer practical solutions on maximizing the talent of today's diverse workforce to improve firm profitability and performance.

Moderator:

Jonathan Fitzgarrald, *Managing Partner*, Equinox Strategy Partners

Panelists:

Daniella Isaacson, *Senior Legal Analyst*, ALM Intelligence

Bhavik R. Patel, *Managing Partner & Chairman of the Executive Committee*, Sandberg Phoenix & von Gontard P.C.

Amanda L. Schneider, *Chief Marketing Officer*, Epstein Becker Green, P.C.

Roundtable 3:

Engineering Growth: A Practical Guide to Building Experience Management Systems in the Firm

Knowing a firm's experience, as embodied in its people and the work it has done for clients, is mission critical for winning new business, cross-selling to existing clients, submitting league tables, pitches, RFP responses, and more. On the technology front, some firms build home-grown systems to capture this information, while others implement a commercial product. But, as many firms have learned, technology is only a small piece of the puzzle. Successful firms integrate people and processes to create sustainable ecosystems. This session will provide practical advice on how to capture data at the appropriate stage of the matter life cycle, how to deliver it effectively, and how to build cross-departmental relationships to make this magic happen on a routine basis.

Moderator:

Sally Gonzalez, *Senior Consultant*, Fireman & Company

Facilitators:

Katherine Miletich, *Director of Marketing*, Vedder Price

Jeff Rovner, *Managing Director for Information*, O'Melveny & Myers LLP

Breakout #4:

In Brand We Trust: Analytics-Driven Strategies with “New” Social Media

Are law firm websites and attendant social media platforms poised for a makeover? Historically deployed as marketing apparatuses for outlining value and other distinguishing characteristics, law firm social media platforms are now re-imagined as communal hubs for robust—and perpetual—client engagement. In an era of ardent 24/7 client hyperconnectivity, what would a newly recalibrated social media presence entail? What forms of business intelligence help inform and define this new approach?

Moderator:

Nadia Rahman, *Associate Vice President & Senior Digital Analyst*, Finn Partners

Facilitators:

Michael J. Mellor, *Director of Marketing*, Pryor Cashman LLP

Jennifer Mir, *Practice Development Director*, Munger, Tolles & Olson LLP

5:15pm – 7:15pm

The Grand Reception

Please join us at the Pool for our 25th anniversary soirée. Spouses and significant others are welcome.

Day Three

Friday, January 26, 2018

8:30am – 9:30am

TED Talk Breakfast

Please join us for breakfast and three TED style presentations as we kick off our Friday program in style.

9:30am – 10:30am

Friday Morning Keynote:

Lessons on Leadership from Captain Phillips

Thomson Reuters is pleased to welcome Captain Richard Phillips, Captain of the Maersk Alabama, who was held hostage by Somali pirates in 2009 and rescued by US Naval SEALs in a riveting international drama played out on live television. Captain Phillips will share his harrowing tale and discuss the vital importance of leadership and teamwork, seen through the eyes of an unassuming hero who conquered an extraordinary challenge.

Presenter:

Captain Richard Phillips, Captain of the *Maersk Alabama*; Author, *A Captain's Duty: Somali Pirates, Navy SEALs, and Dangerous Days at Sea*

10:30am – 10:45am

Break & Announcement of Sponsor Bingo Winners

10:45am – 12:00pm

Breakout Discussions

Please join us for two concluding discussions for client development partners and senior marketing professionals.

Breakout #1:

Embracing Change: Taking the Lead in Conducting an Effective Marketing & Business Development Audit

Leading change within one's firm requires careful planning and comprehensive knowledge of talent, infrastructure and process—a project often easier said than done in an era of “more with less.” Thanks to perpetual competition and evidence of more legal work moving in-house, law firms are paying close attention to the role and ROI of marketing and business development initiatives. This session takes an earnest look at several key questions every business leader should ask:

- What do we need to support the firm strategy and take us to another level?
- Does our current organizational structure make sense in the current climate?
- Have we truly maximized our business development/marketing talent or are more changes needed?

Moderator:

Jennifer Scalzi, *Chief Executive Officer & Founder, Calibrate Legal*

Panelists:

Zeynep Ersin, *Director of Practice Development & Operations, Labor & Employment, Seyfarth Shaw LLP*

Anusia E. Gillespie, *Senior Manager of Program Development, Harvard Law School Executive Education*

Breakout #2:

The Culture Conundrum: Culture as Strategy in Legal Business Development

It's said that culture eats strategy for breakfast—or lunch, as the case may be. According to noted management gurus Curt Coffman and Kathie Sorensen, at many professional services firms, brand association creates merely “a desire to belong” in the client's eye, whereas culture “cements the relationship.” When soliciting new business, how often do law firms sell their *culture* as a distinguishing characteristic? When pursuing client feedback or recruiting talent, how much emphasis is placed on the role of firm values, talent, or philosophical ethos in the eyes of those outside the organization? This lively discussion solicits candid thoughts from in-house counsel and law firm management around how, when and why organizational culture continues to make or break client engagements.

Moderator:

Amanda K. Brady, *Partner & Global Practice Leader, Law Firm Management, Major, Lindsey & Africa*

Panelists:

F. Samuel Eberts III, *Chief Legal Officer, Corporate Secretary & Senior Vice President of Corporate Affairs, Laboratory Corporate of America Holdings*

Kevin Hogarth, *Global Director of People & Culture, Norton Rose Fulbright LLP*

Terry M. Isner, *Chief Executive Officer/Owner, Marketing & Branding*, Jaffe
Melissa R. Margulies, *Client Service & Professional Development Counsel*, Ballard
Spahr LLP
Joseph H. Otterstetter, *Managing Counsel & Associate General Counsel*, 3M

12:00pm

Bloody Mary Brunch

Please join us on the terrace for a convivial networking brunch as our Marketing Partner Forum concludes with brunch & cocktails along the California coast.