



The Thomson Reuters Legal Executive Institute & Intapp

*Proudly present*

## The 22<sup>nd</sup> Annual Law Firm Leaders Forum

October 12-13, 2016

The Harvard Club of New York City  
35 W 44<sup>th</sup> Street  
New York, NY 10036

### Co-Chairs

**Ralph Baxter**, *Advisor to the Legal Profession; Chairman of the Advisory Board,*  
Thomson Reuters Legal Executive Institute

**Betty O. Temple**, *Chair & Chief Executive Officer, Womble Carlyle Sandridge & Rice, LLP*

**Lucy Endel Bassli**, *Assistant General Counsel, Legal Operations & Contracting, Microsoft Corporation*

Program (all times local)

Thursday, October 12

**8:00am – 8:55am**      **Registration & Breakfast**

**8:55am – 9:00am**      **Opening Remarks**

**9:00am – 9:45am**      **Annual Report on the Developments in the Business & Profession of Law**

Each year we begin the Forum with an examination of the most significant developments of the last twelve months. Aric Press, longtime editor in chief of the American Lawyer magazine, and now advisor to law firms in their client relationships, will open the session with his informed and provocative observations, followed by a panel consisting of Dean Andrew Perlman, Chair of the ABA's Center for Innovation, and the program co-chairs.

Moderator:

**Ralph Baxter**, *Advisor to the Legal Profession; Chairman of the Advisory Board,*  
Thomson Reuters Legal Executive Institute

Panelists:

**Aric Press**, *Partner, Bernero & Press LLC*

**Andrew M. Perlman**, *Dean and Professor of Law, Suffolk University Law School;*  
*Chair, ABA Center for Innovation*

**Betty O. Temple**, *Chair & Chief Executive Officer, Womble Carlyle Sandridge & Rice,*  
LLP

**Lucy Endel Bassli**, *Assistant General Counsel, Legal Operations & Contracting,*  
Microsoft Corporation

**9:45am – 10:30am**

**A New Look at Law Firm Financial Performance**

In this session, Bruce MacEwen, publisher of the Adam Smith, Esq. blog and prolific author, will present a provocative new look at law firm financial performance, penetrating beneath the traditional metrics of averages and “profits” per equity partner, to examine what is really happening to law firms as a consequence of the changing demands of the marketplace. Bruce will be joined by an exceptional panel of experts in law firm financial data.

Moderator:

**Ralph Baxter**, *Advisor to the Legal Profession; Chairman of the Advisory Board*, Thomson Reuters Legal Executive Institute

Panelists:

**David Barnard**, *Founding Partner*, Blaqwell, Inc.

**Dan DiPietro**, *Managing Director & Chairman*, Citi Private Bank Law Firm Group

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

**Aric Press**, *Partner*, Bernero & Press LLC

**10:30am – 10:45am**

**Morning Beak**

**10:45am – 12:00pm**

**CLOC: The Potential Game Changer in the Evolution of the Legal Service**

The formation of a new organization of corporate counsel promises to be one of the most significant developments in legal service in many years. Known as “CLOC,” the Corporate Legal Operations Consortium has quickly assumed a leadership role in the legal services marketplace, with the potential to be a genuine game changer. Consisting of more than 400 of America’s largest companies, CLOC is stimulating open communication among all of the participants in the legal service ecosystem, with an objective of establishing meaningful progress for the benefit of all. Its first Institute in 2016 attracted an audience of more than 500 attendees. This year’s Institute attracted more than 1,000 participants. In this session, CLOC founders will share the organization’s mission and describe how it plans to work with its members, law firms, legal technology companies, legal process outsourcers, and law schools to improve the way legal service is delivered.

Moderator:

**Lucy Endel Bassli**, *Assistant General Counsel, Legal Operations & Contracting*, Microsoft Corporation

Panelists:

**Connie Brenton**, *Chief of Staff & Director of Legal Operations*, NetApp Inc.

**Christine Coats**, *Vice President of Legal Operations*, Oracle Corporation

**Mary O’Carroll**, *Head of Legal Operations*, Google

**Jeff Franke**, *Chief of Staff to the General Counsel & Senior Director of Global Legal Operations*, Yahoo, Inc.

**12:00pm – 1:15pm**

**Keynote Luncheon**

Much has changed in US politics under the new presidential administration. From alleged Russian collusion to US healthcare reform, the state of American politics has never been more volatile. This October, in an ongoing commitment to delivering cogent and timely insights from some of the nation’s most prominent voices, the Thomson Reuters Legal Executive Institute is pleased to welcome Mark Halperin and John Heilemann, creators, executive producers and co-hosts of Showtime’s *The Circus*, for a moderated discussion on the unfolding spectacle of US politics in 2017.

Moderator:

**Andy Sullivan**, *US Domestic Policy Correspondent*, Reuters News

Presenters:

**Mark Halperin**, Creator, Executive Producer & Co-Host, *The Circus*; *Senior Political Analyst*, NBC News and MSNBC; *Co-author*, *Game Change & Double Down: Game Change 2012*

**John Heilemann**, Creator, Executive Producer & Co-Host, *The Circus*; *National Affairs Analyst*, NBC News and MSNBC; *Co-author*, *Game Change & Double Down: Game Change 2012*

**1:15pm – 2:30pm**

### **Adapting to the New Service Model**

As law firms work to meet the changing demands of the marketplace, they must re-examine their business models across the board. Delivering service that is better, faster, and cheaper requires changes not only to processes and technology, but talent and financial models as well. This session will explore the specifics of these changes and how law firms can best adopt strategic and change management methods to lead them successfully.

Moderator:

**Betty O. Temple**, *Chair & Chief Executive Officer*, Womble Carlyle Sandridge & Rice, LLP

Panelists:

**Peter J. Devlin**, *Chair, President & Chief Executive Officer*, Fish & Richardson, P.C.

**John Hall**, *Chief Executive Officer*, Intapp, Inc.

**Laura King**, *Partner, Global Head of People and Talent*, Clifford Chance LLP

**Thomas W. Turner, Jr.**, *Managing Partner*, Procopio, Cory, Hargreaves & Savitch LLP

**2:30pm – 2:45pm**

### **Break**

**2:45pm – 4:00pm**

### **The Newest Generation**

By the year 2022, millennials will constitute the majority of lawyers in the AmLaw 200. Managing and leading them will represent different challenges and require different skills and tactics than were required to preside over the traditional set of lawyers. For example, statistics show that millennials change jobs far faster (an average of 1.8 years) than previous generations, with obvious implications for the return on the investment firms make to train and integrate lawyers into the firm. Dr. Larry Richard, the leading expert of the psychology of lawyers, will lead this session, identifying four psychological needs of millennials which are critical to a strategy to build committed relationships. He will be joined by a panel of law firm leaders to discuss the practical implications of leading the newest generation of lawyers.

Moderator:

**Lucy Endel Bassli**, *Assistant General Counsel, Legal Operations & Contracting*, Microsoft Corporation

Panelists:

**Claudia Grillo**, *Managing Director of Recruitment Marketing*, Vault.com

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

**Dr. Larry Richard**, *Founder & Principal Consultant*, LawyerBrain

**Faiza J. Saeed**, *Presiding Partner*, Cravath, Swaine & Moore LLP

**4:00pm – 5:00pm**      **Thursday Night Reception**

Friday, October 13

**8:00am – 9:00am**      **Networking Breakfast**

**9:00am – 10:00am**

**Why Are Women Not In More Law Firm Leadership Roles?**

Notwithstanding years of sincere efforts to improve diversity and inclusion, the participation of women in law firm leadership continues to trail their representation in the profession. The statistics are stark: while half of law school graduates are female, only 18% percent of equity partners in the US are female. What is going on here? A panel of experienced law firm and law department leaders will engage in a candid and pragmatic discussion of this issue and potential solutions.

Moderator:

**Betty O. Temple**, *Chair & Chief Executive Officer*, Womble Carlyle Sandridge & Rice, LLP

Panelists:

**Kim Koopersmith**, *Partner & Chairperson*, Akin Gump Strauss Hauer & Feld LLP

**Jami Wintz McKeon**, *Firm Chair*, Morgan, Lewis & Bockius LLP

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

**James E. Torgerson**, *Managing Partner*, Stoel Rives LLP

**Mitchell Zuklie**, *Global Chairman & Chief Executive Officer*, Orrick, Herrington & Sutcliffe LLP

**10:00am – 10:15am**

**Break**

**10:15am – 11:15am**

**Law Firms' Responsibility to Contribute to Society and the Rule of Law**

Lawyers have a fundamental responsibility to contribute to society and the rule of law. This responsibility goes to the heart of what it means to be a professional. In today's ever more competitive and commercial environment, these responsibilities are often overshadowed and effectively diminished by pressure to generate business and achieve financial goals. This panel of leaders in the profession will examine the current state of professional responsibility and what law firms can do to ensure that their lawyers are doing their part.

Moderator:

**Lucy Endel Bassli**, *Assistant General Counsel, Legal Operations & Contracting*, Microsoft Corporation

Panelists:

**Jeh Charles Johnson**, *Partner*, Paul, Weiss, Rifkind, Wharton & Garrison LLP; *Former United States Secretary of Homeland Security*

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

**Andrew M. Perlman**, *Dean and Professor of Law*, Suffolk University Law School; *Chair*, ABA Center for Innovation

**James J. Sandman**, *President*, Legal Services Corporation

**11:15am – 11:30am**

**Break**

**11:30am – 12:30pm**

**Practicing Law in an Uncertain and Unpredictable Washington, D.C.**

Federal public policy and regulation in the Trump administration are more uncertain than at any time in American history. How do lawyers advise clients in such an environment? To examine this question we have assembled a panel of leading client advisors with distinguished experience at the highest ranks of federal government.

Moderator:

**Ralph Baxter**, *Advisor to the Legal Profession; Chairman of the Advisory Board, Thomson Reuters Legal Executive Institute*

Panelists:

**Marc-André Blanchard**, *Ambassador and Permanent Representative of Canada to the United Nations*

**James M. Cole**, *Global Co-Lead, White Collar: Government Litigation & Investigations Practice, Sidley Austin LLP; Former Deputy Attorney General of the United States*

**Mark A. Patterson**, *Firmwide Co-Chair, Public & Strategic Affairs Group, Perkins Coie LLP; Former Chief of Staff, US Department of the Treasury*

**Kevin J. Wolf**, *Partner, Akin Gump Strauss Hauer & Feld LLP; Former Assistant Secretary of Commerce for Export Administration in the Bureau of Industry and Security (BIS), US Department of Commerce*

**12:30pm**

**Conclusion**