



The Thomson Reuters Legal Executive Institute

proudly presents

The 28th Annual Law Firm Marketing Partner Forum
Open Range: New Frontiers, New Opportunities

August 18-20, 2021

The Ritz Carlton Laguna Niguel
One Ritz-Carlton Drive
Dana Point, CA 92629

Co-Chairs

Silvia L. Coulter, *Principal, Business Development Practice Leader, LawVision Group, LLC*
Beth Cuzzone, *Chief Business Growth Officer, Goulston & Storrs PC*
Justin Ergler, *Director, Alternative Fee Intelligence and Analytics, GlaxoSmithKline*

PROGRAM (all times local)

Day One

Wednesday, August 18, 2021

12:00pm

Registration & Welcome Luncheon

Please join us for lunch in the Monarch Bay Courtyard as we kick off our 2021 program.

Wednesday Workshops

1:00pm–2:30pm & 2:45pm–4:15pm

Attendees are invited to participate in three interactive workshops designed for law firm partners and senior business development executives. These workshops will occur twice (following a fifteen-minute break) in order to allow attendees two opportunities to participate.

Workshop #1:

O Pioneers!: New Frontiers in Law Firm Pricing Strategy

As global business continues to awaken from involuntary hibernation, law firms are reinventing their value proposition through new, highly creative, client-centric pricing plans emblematic of a market transformed. Clients need their law firms to be agile and more efficient than ever, especially when slashed legal budgets and leaner staff headcounts appear par for the course. This workshop offers an important (if indeed prescient) opportunity for law firm marketing and business development leaders to engage peers and clients in an interactive examination of emergent pricing methodologies and client feedback in the modern legal services landscape.

Workshop #2:

The Good, the Bad and the Ugly: Building & Maximizing Law Firm Sales Teams

Every business leader has a preferred approach to building a successful team. Whereas some envision a focused blend of talent grounded in industry expertise, others seek voices with broad,

pan-industry knowledge in order to best engage the customer. Philosophical inclinations notwithstanding, the ultimate goal remains the same. Yet, as is often the case with best laid plans, the devil is in the detail. This workshop offers solutions for maximizing the impact of truly dynamic enterprise squads. Participants are invited to share perspectives on what accelerates or impedes peak performance within their own organizational walls.

Facilitators:

Christian F. Berger, *Senior Advisor, Strategic Business Development*, McGuireWoods LLP
David Burkhardt, *Client Service Director*, Wyrick Robbins Yates & Ponton LLP
Mike Duffy, *Director of Growth & Client Services*, King & Spalding LLP
Stephanie Hinrichs, *Senior Director of Sales*, Womble Bond Dickinson (US) LLP

Workshop #3:

Pattern Recognition 2.0: Predicting Client Profitability through Data Analysis

Continuing a conversation begun at last year's Forum, this workshop offers a sophisticated examination of predictive analytics in law firms today. Anchored by a novel and comprehensive case study, our presenters will deliver advanced insights into how predictive modeling is transforming law firm business development efforts and creating a competitive advantage. Participants will work collaboratively and leverage basic data analysis, statistical techniques, and net promoter score (NPS) calculations to understand client lifecycle, rotation, attrition causation, and more. Please be advised, prior participation in last year's workshop is not required.

Facilitators:

Mark Medice, *Principal, Data Science Practice Leader*, LawVision Group LLC
Jennifer Roberts, *Senior Manager, Strategic Research – Egencia*, Expedia Group

4:15 pm – 4:45pm **Break**

Champagne Roundtables

4:45pm – 5:45pm

Please join us for a glass of champagne and three lively discussions on hot topics in the legal profession.

Roundtable #1:

Roughing It: Recalibrating Law Firm Business Development & Marketing Spend

It's difficult to imagine where legal marketing efforts would be today without the aid of technology over the past twelve months. Thanks to remote working arrangements and social distancing, marketing and business development strategy—not to mention in-person client engagement—has taken on a decidedly different hue. How have law firm marketing leaders adapted to the new business climate? What impact have recent events had on departmental budgets and spend? How effective has virtual client interaction been for business development and networking efforts? This roundtable invites audience participation as we assess the short- and long-term ramifications of an unprecedented, historical ordeal.

Moderator:

Jennifer Schaller, Esq., *Managing Director & Co-Founder*, The National Law Review

Roundtable #2

Smoke Signals: Managing Global Marketing Teams

Even before the onset of COVID-19, global firms reported robust business uptick across manifold markets and locales. Since then, short-term economic pain has given way to exciting and potentially lucrative opportunities upon which firms look to capitalize. This roundtable invites law firm leaders to discuss how their strategic vision has progressed with respect to international talent

management and global growth. Amidst shrinking cross-border footprints and tightening purse strings, how are executives enabling teams to adapt and ultimately thrive?

Facilitators:

Gillian W. Ward, *Global Chief Marketing Officer*, Bryan Cave Leighton Paisner LLP

Roundtable #3:

A Fistful of Dollars: Evaluating Investments in Professional Client Organizations

The global impact of prominent organizations like the Association of Corporate Counsel (ACC), Minority Corporate Counsel Association (MCCA), or the Corporate Legal Operations Consortium (CLOC) is well-documented and profound. In addition to transforming the law firm-client relationship, each organization's impressive membership roll underscores its formidable heft leading up to and during the matter-level negotiation process. Still, despite acknowledging the intrinsic value of such high-profile partnerships, firms may consider the ultimate return on investment to be subjective or, at best, underwhelming. How beneficial have professional partnerships been from a profitability or strategic standpoint? What metrics or criteria determine acceptable ROI? Can more be done to accommodate the interests of all parties involved?

Moderator:

Adam Crowson, *Chief Executive Officer*, Inspired Professionals LLC

Panelists:

Deborah Ruffins, *Chief Marketing Officer*, Perkins Coie LLP

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

Please join us for our cocktails and canapés as we reflect upon the day's discussions. Spouses and significant others are welcome.

Day Two

Thursday, August 19, 2021

8:30am – 9:20am Networking Breakfast

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

Mike Abbott, *Vice President, Market Insights & Thought Leadership*, Thomson Reuters

9:30am – 10:30am Ride the High Country: Recalibrating Strategic Direction in the COVID-19 Era

Please join us as we begin this year's program with a timely examination of evolving strategic priorities for chief legal officers and general counsel in the new calendar year. Leveraging global industry research from Acritas, this panel offers an important opportunity for law firm partners and marketing and business development executives to understand the new rules of engagement at a moment when headwinds of corporate responsibility and activism, social justice, and public health continue to redefine modern business.

Panelists:

Colin Passmore, *Senior Partner*, Simmons & Simmons LLP

10:30am – 10:45am **Morning Break**

10:45am – 12:00pm **Keynote Address**

The Shape of Progress: Unlocking Atomic Habits

Progress in our daily lives is incumbent upon a series of interlocking, often subconscious, habits that compound for or against our success. Today’s most effective business leaders identify and prioritize “good” habits over those that hinder them, and in so doing, set themselves apart from peers. What is the key to mastering such behavior? How can top performers become even better at leading organizations, reinforcing accountability, and motivating teams? This year, the Thomson Reuters Institute is pleased to welcome New York Times Bestselling Author James Clear for a special presentation on leadership, decision-making and personal improvement in today’s business climate. Mr. Clear will offer new and practical guidance based upon his multidisciplinary research into the science of habit formation in work and life.

Presenter:

James Clear, *New York Times Bestselling Author of Atomic Habits*

12:00pm – 1:00pm **Networking Luncheon**

1:00pm – 1:15pm **Break**

1:15pm – 2:30pm **Breakout Discussions**

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

Breakout #1:

Lone Wolves & Mavericks: Managing Law Firm Relationship Partners

Even in the best of times, agility and collaboration are crucial practices for law firm client relationship partners and client teams. Indeed, without a willingness to engage peers and amplify their firm’s value to the customer, relationship partners fall well-short in maximizing their true potential as trusted legal advisors or rainmakers par excellence. This panel ponders a comprehensive approach to fostering collaborative instincts in business colleagues. How can marketing and business development leaders coach and encourage relationship partners to take full advantage of enterprise resources?

Moderator:

Jan Anne Dubin, *Chief Executive Officer & Founder*, Jan Anne Dubin Consulting

Panelists:

Paul McCurdy, *Partner, Financial Markets & Funds*, Katten Muchin Rosenman LLP

James E. Nelson, *Partner-in-Charge, San Francisco office*, Venable LLP

Amy Yeung, *General Counsel & Chief Privacy Officer*, Lotame, Inc.

Breakout #2:

Broken Fences: Law Firm Organizational Infrastructure & Collaborative Client Service

Few appreciate the impact of organizational infrastructure on law firm marketing strategy and client service. In the modern legal landscape, once-insurmountable fault lines between sales, operations, information management, or data and analytics continue to erode amidst talk of collaborative behaviors and exponential growth. This session examines the myriad structural models in place at firms throughout the profession. How successful have firms truly been at coalescing behind a singular commitment to client service?

Moderator:

Jonathan Fitzgarrald, *Managing Partner*, Equinox Strategy Partners

Panelists:

Jeff Silvestri, *Partner (& Immediate Past Managing Partner)*, McDonald Carano LLP

Breakout #3:

Squandered Resources: Developing a Robust Business Function in the Firm

With market competition and the battle for talent maintaining their frenetic pace, the ability of firm executives to cultivate and retain talent is of paramount import. Firmwide coaching and professional development programs cater almost exclusively to legal personnel. But as client expectations and evolving notions of “value” continue to encompass professionals across technology, pricing, project management, knowledge services or marketing, conventional wisdom surrounding “non-lawyer” careers seems increasingly atavistic if not flawed. This session invites participants to share perspectives on where their firms sit today on the talent management spectrum. What has or has not worked in terms of attracting and developing top performers?

2:30pm – 2:45pm

Break

2:45pm – 4:00pm

No Country for Old Men: Marketing & Business Development Under Generation X

Lost amidst the discourse of Millennials and the multigenerational workforce is the understated but no less significant ascension of Generation X to the highest rungs of power in the firm. As with their predecessors, this newest generation offers its own unique set of leadership priorities—an important distinction in an era of change. What lessons has this new generation gleaned from senior colleagues? What initiatives do leaders feel will usher their firms to new heights? Where and how will marketing, sales, business development, and client service professionals pave the way for sustained success?

Moderator:

Kristin Calve, *Co-Founder*, Law Business Media

Panelists:

Amy R. Patton, *Partner & Co-Chair*, Employment Law Group; *Co-Chair*, *Marketing and Business Development Committee*, Payne & Fears LLP
Elsa Ramo, *Managing Partner*, Ramo Law PC

4:00pm – 4:15pm

Break

4:15pm – 5:15pm

Executive Roundtables

Please join us for three simultaneous discussions dedicated to hot topics in law firm business development and firmwide management.

Breakout #1:

Manifest Destiny: Marketing & Business Development Strategy Through Office Expansion

It's been said that one should never let a good crisis go to waste—especially when it comes to modern business. Despite hegemonic discourse to the contrary, law firms with stable coffers are aggressively entering markets, opening offices, eyeing potential acquisitions, and investing in top-tier talent, all with an eye on lucrative work still to come. Recognizing the critical role of marketing and business development throughout this process, this session highlights practical strategies leveraged by leading firms. What approaches have proven effective at positioning firm services in local markets?

Moderator:

Suzanne Donnels, *Chief Executive Officer*, Suzanne Donnels Consulting

Panelists:

Darren C. Hauck, *Partner-in-Charge, Dallas office*, Alston & Bird LLP

Tiffany Zeigler, *Director of Business Development*, Alston & Bird LLP

Breakout #2:

Winding Canyons: Strategic Client Planning & Account Management in Today's Challenging Environment

With competition and economic uncertainty abound, law firms are relying upon strategic client planning as a proverbial lifeline for retaining important clients, (new) business opportunities, and growth. Whether at large, publicly held companies or smaller, private institutions, law firm clients face a litany of emerging, even unprecedented challenges that outside counsel can anticipate and address. This conversation offers crucial guidance on how to maximize the impact of strategic client management in a challenging environment rife with health, economic, and sociopolitical concerns. What are law firms doing well—and not so well—in their account management approach? How have the unique contours of the COVID-19 business landscape impacted “value” for both the firm and customer? Are law firms sufficiently prepared to (re)launch an effective initiative?

Panelists:

Silvia L. Coulter, *Principal, Business Development Practice Leader*, LawVision Group, LLC

Breakout #3:

Uncharted Realms: 2021 Partner Talks

Please join us for four fifteen-minute presentations from our conference partners. Each presentation offers a compelling take on emerging legal marketing trends poised to impact the profession.

5:15pm – 7:15pm

The Grand Reception

Please join us for cocktails and canapés as we reflect upon the day’s discussions. Spouses and significant others are welcome.

Day Three

Friday, August 20, 2021

8:30am – 9:30am

Networking Breakfast

Please join us for breakfast in the Monarch Bay Courtyard.

9:30am – 10:30am

True Grit: Examining New Law’s Impact on Modern Services

New Law’s presence in legal services has generated considerable buzz throughout the years, with many now embracing the philosophical tenets of “transformation” and “innovation” that once threatened to disrupt the status quo. By its very nature, New Law and its myriad iterations can be difficult to define: to some, it is a marketing tool forged amid rote competition, while others view the push to reinvent legal service delivery as a strategic lever in a broader, more complex journey of enterprise growth. This conversation offers an important opportunity for distinguished industry leaders to discuss how recent events and their current organizational approach to New Law are influencing client service, business development, and capital investments for the remainder of the year.

10:30am – 10:45am

Break

10:45am – 12:00pm

Breakout Discussions

Please join us for two concluding discussions as we wrap up this year’s program.

Breakout #1:

Tall in the Saddle: Managing Practice Leader Performance & Group Profitability

In the COVID-19 era, deft practice group management is essential. Even in the best of times, practice group leaders (PGLs) must drive efficient service delivery and exert their influence over new business opportunities and growth. Unfortunately, given all that’s transpired, practice growth performance has been decidedly uneven, and many PGLs face crucial decisions as leaders, collaborators and trusted firm champions. This conversation explores the changing criteria of practice group productivity and oversight in the current climate. What innovative means are practice group leaders deploying to help drive business? How can marketing and business development leaders help support or usher in success?

Panelists:

Jeanne M. Gills, *Partner & Vice Chair, Intellectual Property Department; Member, Management Committee, Foley & Lardner LLP*

Mike McBride III, *Attorney & Chair, Indian Law & Gaming Practice, Crowe & Dunlevy, P.C.*

Breakout #2:

Bend of the River: Aligning Brand & Talent Acquisition to Reality

Brand, like beauty, is in the eye of the beholder. Every firm fancies itself a destination employer; and marketing teams work assiduously to highlight key

cultural attributes (work-life balance, collegial settings) in order to attract top talent. Yet sometimes, for all the messaging put forth by employers, firm cultural realities may leave much to be desired. This session offers an earnest take on aligning marketing and communications with talent acquisition. How can firms stave off “rude awakenings” on the part of their newest hires?

Moderator:

Michael Ellenhorn, *Founder & Chief Executive Officer*, Decipher

Panelists:

R. Cameron Garrison, *Managing Partner & Executive Committee Chair*,
Lathrop GPM

D. Jason Lyon, *Litigation & Hiring Partner*, Hahn & Hahn LLP

Jennifer S. Queen, *Chief Talent Officer*, Bracewell LLP

12:00pm

Bloody Mary Brunch

Please join us in the Monarch Bay Courtyard for networking brunch beneath the palms.