The Thomson Reuters Legal Executive Institute

proudly presents

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

January 20-22, 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, January 20, 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.

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, Intapp, Inc.

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 begin a new calendar year.

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?

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 appease the interests of all parties involved?

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, January 21, 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  The 2021 Annual Marketing Partner Forum Survey: A Data-Driven Dive on Legal Marketing and Business Development Across the Industry
Please join us as we begin our program with takeaways from a revamped annual Marketing Partner Forum attendee survey and offer cogent analysis of the current state of the legal industry.

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

10:30am – 10:45am  Morning Break

10:45am – 12:00pm  Keynote Address

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?

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?

Panelists:
Colin Passmore, Senior Partner, Simmons & Simmons 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?

Panelists:
Amy R. Patton, Partner & Co-Chair, Employment Law Group; Co-Chair, Marketing and Business Development Committee, Payne & Fears LLP
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?

Breakout #2:  Winding Canyons: Evaluating Firmwide Client Listening Initiatives

With competition and economic uncertainty abound, law firms are turning to client listening programs as a means of further enhancing client interviews and after-action reviews. When properly integrated, client listening can deliver crucial insights for lawyers and professional staff. Yet, even despite such promise, challenges remain over how legal personnel will embrace this innovative approach. This roundtable leverages real world case studies to illustrate how, where and why client listening programs are gaining traction across the profession. Our presenters will address key considerations and potential pitfalls along this important journey.

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, January 22, 2021

8:30am – 9:30am  Networking Breakfast

Please join us for breakfast in the Monarch Bay Courtyard.

9:30am – 10:30am  True Grit: High-Performance Marketing Across Industries

As the world continues its recovery from recent setbacks, business executives are embracing adaptive—indeed resilient—forms of leadership in the midst of rampant economic ennui. Even the most seasoned decision-maker will
acknowledge that 2020’s dramatic turn thrust conventional management strategies into an uncanny spotlight, with any number of perspectives from Accenture to Wharton extolled “new” and “essential” management behaviors for surviving the pandemic. This cross-industry panel offers a unique opportunity for corporate CMOs to assess how the past twelve months have impacted their leadership and strategy. Are businesses fully prepared for what’s to come?

**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**

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?

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

**12:00pm**  
**Bloody Mary Brunch**

Please join us in the Monarch Bay Courtyard for networking brunch as we conclude this year’s program.