

The 28th Annual Marketing Partner Forum

Open Range: New Frontiers, New Opportunities

18-20 AUGUST 2021 • THE RITZ-CARLTON, LAGUNA NIGUEL, DANA POINT, CA

Agenda

DAY ONE

WEDNESDAY, 18 AUGUST 2021

12:00PM PT	Registration & Welcome Luncheon Please join us for lunch as we kick off our 2021 program.	<i>The Plaza/Monarch Bay Courtyard</i>
Exclusively hosted by		



1:00PM-2:30PM PT	Wednesday Workshops	<i>Ritz-Carlton Ballroom Salons I & II</i>
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.

Moderator:

Susan Raridon Lambreth, *Founding Principal, LawVision Group & Chair and Founder, LPM Institute*

Panelists:

Aaron Boersma, *Legal Operations, Strategic Pricing & Analysis Lead, Google LLC*
Karen Lessick, *Associate General Counsel, Invenergy LLC*
Chris Ochs, *Director of Outside Counsel Management, Citigroup Inc.*

Workshop #2

The Good, the Bad and the Ugly: Building & Maximizing Law Firm Sales Teams *Pavilion I & II*

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
Mike Duffy, Director of Growth & Client Services, King & Spalding LLP
Neel Lilani, Global Head, Tech Clients, Orrick Herrington & Sutcliffe LLP

Workshop #3

Pattern Recognition 2.0: Predicting Client Profitability through Data Analysis

Pavilion IV & V

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

2:30PM PT	Break	Ritz-Carlton Ballroom Foyer
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2:45PM-4:15PM PT	Wednesday Workshops	
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Workshop #1	Ritz-Carlton Ballroom Salons I & II
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.	

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4:15PM PT	Networking Break	Ritz-Carlton Ballroom Foyer
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4:45PM-5:45PM PT	Champagne Breakouts	Ritz-Carlton Ballroom Salons I & II (hybrid presentation)
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Breakout #1

Roughing It: Recalibrating Law Firm Business Development & Marketing Spend

It is 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 have websites and virtual client interaction been for business development and networking? 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

Panelists:

Kalisha Crawford, Director of Marketing & Business Development, Ropers Majeski PC

Laura Galeano, Chief Marketing Officer, Bilzin Sumberg Baena Price & Axelrod LLP

Jennifer Manton, Managing Director & Chief Marketing and Business Development Officer, Kramer Levin Naftalis & Frankel LLP

Jason Noble, President & Chief Executive Officer, ikaun

Breakout #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 regard 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?

Pavilion I & II (virtual presentation)

Moderator:

Deborah Farone, Strategic Advisor & Author, Farone Advisors LLC

Panelists:

Wendy Bernero, Global Chief Marketing Officer, Baker McKenzie

Erin Stone Dimry, Chief Marketing & Business Development Officer, DLA Piper LLP (US)

Renee Miller-Mizia, Chief Marketing Officer, Dechert LLP

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

Breakout #3

A Fistful of Dollars: Evaluating Sponsorship Investments in Professional Organizations

Sponsorships are a crucial way for firms to support the professional growth of their talent, drive new business opportunities, and enhance their overall brand or footprint. Yet, despite acknowledging the intrinsic value of many such engagements, many firms consider the ultimate return on investment to be subjective or underwhelming at best. 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?

Pavilion IV & V (hybrid presentation)

Moderator:

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

Panelists:

Steven R. Boutwell, *Chief Operating Officer*, Kean Miller LLP

Trish Lilley, *Chief Marketing & Business Development Officer*, Stroock & Stroock & Lavan LLP

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

Amy T. Shepherd, *Chief Marketing & Business Development Officer*, Ballard Spahr LLP

5:45PM-7:00PM
PT

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.

*Ritz-Carlton Ballroom
Foyer & Monarch Bay
Courtyard*

Exclusively hosted by



DAY TWO
THURSDAY, 19 AUGUST 2021

7:00AM-8:00AM
PT

Nature Walk (please arrive by 6:50am)

Join colleagues for a leisurely and educational tour of local flora and fauna with Ritz-Carlton naturalists. Capacity is limited to 30 total guests.

Eco-Adventure Center

Exclusively hosted by



8:30AM PT

Networking Breakfast

Monarch Bay Courtyard

9:20AM-9:30AM PT Opening Remarks

Ritz-Carlton Ballroom

9:30AM-10:45AM PT General Session

Ritz-Carlton Ballroom

Ride the High Country: Recalibrating Strategic Direction in the COVID-19 Era

The call to innovate is nothing new—and while some firms have embraced the challenge, others still question whether it's a passing trend or a worthwhile investment of time, energy, and money (and, moreover, whether clients actually care). This session will unpack the fundamentals of futureproofing sustainable law firm success by answering the following questions: What does “good” innovation look like? Why does it matter to clients (and firms)? Who should be innovating? How can law firms do this internally and collaboratively with clients?

Moderator:

Beth Cuzzone, *Chief Strategic Growth Officer, Goulston & Storrs PC*

Panelists:

Monica Johnson, *General Counsel, Darigold*

Dash Kohlhausen, *Deputy General Counsel, Fertitta Entertainment Inc.*

Andrew Sprogis, *Chief Innovation Officer, Katten Muchin Rosenman LLP*

Darth K. Vaughn, *Litigation Counsel & Legal Innovation & Technology Operations Manager, Ford Motor Company*

10:45AM PT Morning Break

Ritz-Carlton Ballroom
Foyer

11:00AM-12:00PM PT Keynote Address

Ritz-Carlton Ballroom

The Shape of Progress: Designing Creativity Across the Enterprise

In his over 25-year career at the world's most innovative organization – The Walt Disney Company – Duncan Wardle learned many important things about building a profitable business and winning creative culture. The most important? *If you want to be different, you have to think different.* Leveraging his experiences as Head of Innovation & Creativity at Disney, Duncan will teach participants a unique set of innovation tools and techniques – the same ones Duncan used with teams inside the Disney organization – made famous by Walt Disney himself. After this immersive crash course, attendees will depart with an actionable blueprint to immediately start reshaping their company's culture, create a space where innovation thrives, and foster a sustainable system of reward and encouragement to help teams think differently across the firm.

Presenter:

Duncan Wardle, *Former Head of Innovation, Disney*

12:00PM PT Networking Luncheon *Monarch Bay Courtyard*

1:00PM PT Break *Ritz-Carlton Ballroom Foyer*

1:15PM-2:30PM PT Breakout Discussions *Ritz-Carlton Ballroom Salons I & II*

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:

Gloria J. Lee, *Client Relations Partner, Rutan & Tucker, LLP*

Laura J. Maechtlens, *Partner, Chair, Labor & Employment Department; Member, Executive Committee; Co-Chair, National Diversity & Inclusion Action Team, Seyfarth Shaw 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

Pavilion I & II

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:

Nancy L. Kostakos, *Chief Marketing Officer, Troutman Pepper Hamilton Sanders LLP*

Karen Lessick, *Associate General Counsel, Invenergy LLC*

Adam Silver, *Chief Operating Officer and Managing Partner*, McCalla Raymer Leibert Pierce, LLC
Jeff Silvestri, *Partner (& Immediate Past Managing Partner)*, McDonald Carano LLP

Pavilion IV & V

Breakout #3

Winding Canyons: Strategic 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?

Moderator:

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

Panelists:

Melanie S. Green, *Chief Client Development & Marketing Officer*, Faegre Drinker Biddle & Reath LLP

Miki Hanlen, *Marketing Director*, Intapp, Inc

Jeffrey J. Wild, *Firm Administrative Partner; Chief Strategy Officer; Chair, Real Estate & Environmental Practice Group; Executive Committee Member*, Benesch, Friedlander, Coplan & Aronoff LLP

2:30PM PT	Break	Ritz-Carlton Ballroom Foyer
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2:45PM-4:00PM PT	General Session 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 have these ascendent executives gleaned from senior colleagues? What initiatives does each 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?	Ritz-Carlton Ballroom
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Moderator:

Kristin Calve, Co-Founder, Law Business Media

Panelists:

Hailyn J. Chen, Litigation Partner & Co-Managing Partner, Munger, Tolles & Olson LLP

Kathy H. Ku, Corporate & Securities Partner, Wilson Sonsini Goodrich & Rosati
Russell Lewis, Department Chair – Litigation (Houston) & Partner in Charge (Houston), Baker Botts LLP

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

Chase Simmons, Chairman & Chief Executive Officer, Polsinelli LLP

4:00PM PT	Break	Ritz-Carlton Ballroom Foyer
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4:15PM-5:15PM EDT	Breakout Discussions	Breakout #1 Manifest Destiny: Marketing & Business Development Strategy Through Office Expansion It has been said one should never let a 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?	Ritz-Carlton Ballroom Salons I & II
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Moderator:

Suzanne Donnels, Chief Marketing Officer, Davies Ward Phillips & Vineberg LLP

Panelists:

Craig W. Budner, Global Strategic Growth Partner, K&L Gates LLP

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

Ann Rainhart, Chief Strategy Officer, Taft Stettinius & Hollister LLP

Brett Spooner, Founder & Chief Executive Officer, Gravis Law, PLLC

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

Breakout #2	Pavilion I & II
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Squandered Resources: Developing a Robust Business Function in the Firm

Suffice it to say, the ability of firm executives to cultivate and retain top talent remains a key organizational priority. 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 business careers seems increasingly atavistic or flawed. This

session invites participants to share perspectives on where their firms sit on the talent management spectrum. What has or has not worked in terms of maximizing the business function's full potential?

Moderator:

Amanda K. Brady, *Managing Director & Chief Operating Officer, The Alexander Group*

Panelists:

Ralph Allen, *Chief Operating Officer, Allen Matkins Leck Gamble Mallory & Natsis LLP*

Jessa Baker, *Chief Operating Officer, Applegate & Thorne-Thomsen, P.C.*

Larry Kleinberg, *Executive Director, Atkinson, Andelson, Loya, Ruud & Romo LLP*

Barbara A. Mica, *Chief Operating Officer, Brownstein Hyatt Farber Schreck LLP*

Breakout #3

Uncharted Realms: 2021 Partner Talks

Pavilion IV & V

Partner Talk #1

All Zoomed Out: Delivering High-Quality Training Content in the New Age of Social Distancing

Zoom has become a necessary evil for staying connected in the new age of social distancing. But now that Zoom meetings and "webinars" have become ubiquitous in our work, school and home lives, everyone has Zoom fatigue and is looking once again for high-quality, professional produced content to teach and entertain us. While some law firms have been using high-quality CLE content delivered online and on demand for years to engage with their lawyers, alumni and clients, more and more firms are leaning into this approach in the new age of social distancing. Law firms also can use high-quality, training programs to help their lawyers supplement their in-person preparation of clients for important events, such as testifying at a deposition. Finally, new platforms are offering law firms the opportunity to create innovative, high-quality CLE programs that directly reach a key audience (such as in-house counsel) and produce rich data for the law firms about the lawyers who viewed their programs.

Hosted by New Media Legal Publishing, Inc.



Presenter:

Zach McGee, *Chairman, New Media Legal Publishing, Inc. & Senior Vice President, Business Affairs, Sony Pictures Home Entertainment*

Partner Talk #2

Cross-Selling: A Data-Driven Approach to Client Expansion

As the global legal services market continues to evolve, law firms continue to look inward to differentiate themselves from competitors and maximize new business opportunities within the partnership. This brief presentation highlights what your firm's financial data is telling you about your business and how to formulate sustainable client expansion strategies. We will discuss how to create personalized digital pitches that highlight your most

Hosted by Ikaun



relevant talent and experience and move beyond staid email or PDF attachments to help separate your firm from the pack.

Presenters:

Kalisha Crawford, *Director of Marketing & Business Development*, Ropers Majeski PC
Jason Noble, *President & Co-Founder*, ikaun

Partner Talk #3

Overcoming the Law Firm Sales Pipeline Breakdown

Law firms historically rely on marcom and RFPs to attract new matters. But in a relationship-driven business, it is the lawyers' professional networks that secure meaningful client opportunities. How can law firms harness the full potential of their lawyers' relationships when many partners resist business development, won't regularly use CRM, and can't be held accountable to a sales strategy? In this program, David Ackert shares frameworks, strategies, case studies, and tactical solutions to the law firm sales pipeline conundrum.

Presenter:

David Ackert, *President*, Ackert Inc.

Hosted by Ackert, Inc.



Partner Talk #4

Back Off Man, I'm a (Marketing) Scientist

Already accelerated by the pandemic, the push for greater return on your marketing efforts is only increasing. Showing a direct impact on new business has always been a challenge for legal marketers, but now there is a way forward. The nascent realm of Marketing Science combines the large pool of marketing engagement data with existing opportunity and financial metrics to provide a clear picture on marketing's role in bringing dollars through the door. Here you will learn about how a Marketing Scientist fits with your team, the data you'll need and why you shouldn't feel overwhelmed by this paradigm shift.

Presenter:

Jason Kennedy, *Marketing Systems Consultant*, Wilson Allen

Hosted by Wilson Allen



5:15PM-7:00PM
PT

The Grand Reception

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

Dana Lawn

Exclusively hosted by



DAY THREE

FRIDAY, 20 AUGUST 2021

8:30AM PT	Networking Breakfast	Monarch Bay Courtyard
9:30AM-10:30AM PT	General Session 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.	Ritz-Carlton Ballroom
	Moderator: Lucy Endel Bassli , <i>Founder & Principal, InnoLaw Group, PLLC</i>	
	Panelists: Kunoor Chopra , <i>Vice President, Legal Services, Elevate Services</i> Mark Ross , <i>Principal, Legal Services Practice, Deloitte Tax LLP</i> Jason Solomon , <i>Executive Director, Center on the Legal Profession, Stanford Law School</i>	
10:30AM	Break	Ritz-Carlton Ballroom Foyer
10:45AM-12:00PM PT	Breakout Discussions 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?	Pavilion I & II
	Moderator: Maggie Watkins , <i>Senior Client Services Director, Womble Bond Dickinson (US) LLP</i>	

Panelists:

John G. Kerkorian, *Strategic Planning Partner & Member, Management Committee, Ballard Spahr LLP*

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

Joyce K. Soliman, *Partner & Leader, Finance Section & Chair, Diversity & Inclusion Committee, Porter Hedges 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 more 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?

Pavilion IV & V

Moderator:

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

Panelists:

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

Iris Jones, *Chief Marketing & Client Development Officer, Akerman LLP*

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

12:00PM PT

Bloody Mary Brunch

Monarch Bay Courtyard

Please join us for a relaxed networking brunch beside the sea.
