

# The 29<sup>th</sup> Annual Marketing Partner Forum

Fates Reforged: Law Firm Strategic Planning in the New Client Era

19-21 JANUARY 2021 • THE RITZ-CARLTON, AMELIA ISLAND, JACKSONVILLE, FL

## Agenda

### DAY ONE

WEDNESDAY, 19 JANUARY 2022

<b>12:00PM ET</b>	<b>Registration &amp; Welcome Luncheon</b> <i>Please join us for lunch as we kick off our 2022 program.</i>	<i>Oceanfront Lawn &amp; Terrace</i>
	Registration opens at 11:00AM ET. Luncheon served at 12:00PM ET.	
<b>1:00PM-2:30PM ET</b>	<b>Wednesday Workshops</b> <i>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) to afford two opportunities to participate.</i>	
	<b>Workshop #1</b> <b>Altruistic Intent: New Business Opportunities Around CSR &amp; ESG Initiatives</b> Long before recent events brought social inequity to the fore, influential groups such as the Business Roundtable called upon corporate entities “to create value for all [company] stakeholders” (customers, employees, suppliers, shareholders, and communities) in an increasingly fractious and volatile political climate. In 2022, after a year wherein many organizations embraced corporate social responsibility (“CSR”) or environmental, social, and governance (“ESG”) initiatives, the legal services sector is poised to offer meaningful change for clients committed to noble and intentional “purpose.” This workshop asks participants to examine the social, strategic, and fiscal impact of CSR investments across their firm. Are legal services providers maximizing the synergies between new business development and CSR/ESG in a landscape rife with opportunity?  Facilitators: <b>Pamela Cone</b> , <i>Founder &amp; Chief Executive Officer</i> , Amity Advisory <b>Jazz Hampton</b> , <i>Chief Executive Officer &amp; General Counsel</i> , TurnSignal <b>John Page</b> , <i>Senior Vice President, Chief Corporate Social Responsibility Officer &amp; Chief Legal Officer</i> , Golden State Foods <b>Kristin L. Parker</b> , <i>Environmental Sustainability Partner</i> , Chapman & Cutler LLP <b>Peter D. Robertson</b> , <i>Of Counsel</i> , Squire Patton Boggs	<i>Ritz-Carlton Ballroom Salon III</i>
	<b>Workshop #2</b> <b>Course Correction: Stress-Testing a Law Firm Industry or Sector Approach</b>	<i>Plaza Ballroom I</i>

Industry or sector strategy has been a popular trend in legal services. According to Thomson Reuters Strategic Insights data, resource allocation and budgetary investment around sectors and industries affords tangible market impact—including robust favorability drivers and realization rates—on both a regional and international scale. Since the pandemic's onset, however, new market research suggests a decidedly uneven ROI for the nearly 66% of Am Law 100 firms deploying this nascent service model—a reality forcing many to recalibrate their approach. How are firms assessing their go-to-market strategy in an evolving client environment? What lessons do data and client feedback tell us about competing at home and abroad?

Moderator:

**Tom Snavelly**, *Principal Consultant – Advisory Services, Market Insights & Thought Leadership*, Thomson Reuters

Facilitators:

**Valerie K. Brennan**, *Chief Marketing Officer*, Munger, Tolles & Olson LLP

**Beth Cuzzone**, *Global Vice President, Marketing & Business Development*, Intapp

**Betsy Donovan**, *Head of US Marketing & Business Development*, Withers Bergman LLP

**Catherine Zinn**, *Chief Client Officer*, Baker Botts, LLP

### **Workshop #3**

#### **The Young and the Restless: Coaching Professional Development Among Associates**

Business development upskilling within the law firm Associate and Of Counsel ranks is a crucial driver for success. Indeed, as client-facing assets, both demographics have tremendous potential to leverage client relationships and bring forth exciting business opportunities that might otherwise fall through the cracks. At some firms, professional development teams assume primary responsibility for cultivating a “rainmaker” mindset. Conversely, other firms may look toward marketing leaders or outside consultants to effectuate career success. This workshop offers a practical dive into law firm associate behavior, professional growth, and coaching techniques. What processes work best at unlocking business development potential for junior members of the firm? How can firms better encourage and accelerate associate-driven business opportunities from “lead” to formal engagement?

*Plaza Ballroom II*

Facilitators:

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

**Carrie Hanna**, *Chief Strategy Officer*, Gunster

**Brent Turner**, *Director, Strategic Insights & Market Intelligence*, Thomson Reuters

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

2:30PM ET-  
2:45PM ET

Break

Ritz-Carlton Ballroom  
Foyer

2:45PM-4:15PM  
ET

Wednesday Workshops

*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) to afford two opportunities to participate.*

**Workshop #1**

**Altruistic Intent: New Business Opportunities Around CSR & ESG Initiatives**

Long before recent events brought social inequity to the fore, influential groups such as the Business Roundtable called upon corporate entities “to create value for all [company] stakeholders” (customers, employees, suppliers, shareholders, and communities) in an increasingly fractious and volatile political climate. In 2022, after a year wherein many organizations embraced corporate social responsibility (“CSR”) or environmental, social, and governance (“ESG”) initiatives, the legal services sector is poised to offer meaningful change for clients committed to noble and intentional “purpose.” This workshop asks participants to examine the social, strategic, and fiscal impact of CSR investments across their firm. Are legal services providers maximizing the synergies between new business development and CSR/ESG in a landscape rife with opportunity?

Facilitators:

**Pamela Cone**, *Founder & Chief Executive Officer*, Amity Advisory

**Jazz Hampton**, *Chief Executive Officer & General Counsel*, TurnSignal

**John Page**, *Senior Vice President, Chief Corporate Social Responsibility Officer & Chief Legal Officer*, Golden State Foods

**Kristin L. Parker**, *Environmental Sustainability Partner*, Chapman & Cutler LLP

**Peter D. Robertson**, *Of Counsel*, Squire Patton Boggs

Ritz-Carlton Ballroom  
Salon III

**Workshop #2**

**Course Correction: Stress-Testing a Law Firm Industry or Sector Approach**

Industry or sector strategy has been a popular trend in legal services. According to Thomson Reuters Strategic Insights data, resource allocation and budgetary investment around sectors and industries affords tangible market impact—including robust favorability drivers and realization rates—on both a regional and international scale. Since the pandemic’s onset, however, new market research suggests a decidedly uneven ROI for the nearly 66% of Am Law 100 firms deploying this nascent service model—a reality forcing many to recalibrate their approach. How are firms assessing their go-to-market strategy in an evolving client environment? What lessons do data and client feedback tell us about competing at home and abroad?

Plaza Ballroom I

Moderator:

**Tom Snavely**, *Principal Consultant – Advisory Services, Market Insights & Thought Leadership*, Thomson Reuters

Facilitators:

**Valerie K. Brennan**, *Chief Marketing Officer*, Munger, Tolles & Olson LLP  
**Beth Cuzzone**, *Global Vice President, Marketing & Business Development*, Intapp  
**Betsy Donovan**, *Head of US Marketing & Business Development*, Withers Bergman LLP  
**Catherine Zinn**, *Chief Client Officer*, Baker Botts, LLP

**Workshop #3**

*Plaza Ballroom II*

**The Young and the Restless: Coaching Professional Development Among Associates**

Business development upskilling within the law firm Associate and Of Counsel ranks is a crucial driver for success. Indeed, as client-facing assets, both demographics have tremendous potential to leverage client relationships and bring forth exciting business opportunities that might otherwise fall through the cracks. At some firms, professional development teams assume primary responsibility for cultivating a “rainmaker” mindset. Conversely, other firms may look toward marketing leaders or outside consultants to effectuate career success. This workshop offers a practical dive into law firm associate behavior, professional growth, and coaching techniques. What processes work best at unlocking business development potential for junior members of the firm? How can firms better encourage and accelerate associate-driven business opportunities from “lead” to formal engagement?

Facilitators:

**Silvia L. Coulter**, *Principal, Business Development Practice Leader*, LawVision Group, LLC  
**Carrie Hanna**, *Chief Strategy Officer*, Gunster  
**Brent Turner**, *Director, Strategic Insights & Market Intelligence*, Thomson Reuters  
**Gillian Ward**, *Global Chief Marketing Officer*, Bryan Cave Leighton Paisner LLP

4:15PM ET-  
4:45PM ET

Networking Break

*Ritz-Carlton Ballroom  
Foyer*

4:45PM-5:45PM  
ET

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

**Breakout #1**  
**Fallow Earth: Building the Next-Generation Law Firm Marketing Department**

*Ritz-Carlton Ballroom  
Salon III*

With the pandemic laying bare areas of growth and opportunity for law firm marketing chiefs, assessing the limitations of one's current departmental structure is both a prudent and timely business exercise. Client needs requiring specialty skill sets or more intentional collaboration suggest that traditional departmental silos are increasingly atavistic—perhaps more so than ever—and ill-equipped for a market transformed. This conversation invites law firm marketing leaders to envision a more malleable operational model for their firm. What skills or roles should be (de)prioritized in the near or distant future?

Facilitators:

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

**Lynn Tellefsen**, *Chief Marketing Officer*, Wilentz, Goldman & Spitzer, P.A.

### **Breakout #2**

*Plaza Ballroom I*

#### **Guided Passage: The Evolving Law Firm Website & Digital Client Journey**

As hybrid work arrangements continue to surge, the heightened significance of interactive websites and a robust digital footprint presents a fantastic opportunity for law firm leaders. Savvy CMOs recognize that industry-wide practices once governing law firm web presence no longer pass muster in an era of speed, accessibility, and efficiency. Moreover, with both high- and low-end competition still eating away at the proverbial pie, it is increasingly likely that firms failing to reimagine their digital client journey risk far more than the immediate, upfront costs associated with infrastructure investment. This roundtable offers guidance on the new law firm website parameters. What considerations must every law firm executive adopt to maintain and enhance market presence?

Facilitators:

**Yolanda Cartusciello**, *Partner*, PP&C Consulting

**Kalev Peekna**, *Chief Strategist*, One North

### **Breakout #3**

*Plaza Ballroom II*

#### **The Longest Hours: Quantifying Marketing's Impact to the Business**

An unfortunate consequence of the COVID-19 pandemic has been the collateral damage wrought on marketing department budgets and leaders alike. Even in the best of times, marketing is seen as a non-essential business function within certain firm corridors. Yet the fact remains that many marketing and client service departments drastically *enhanced* their productivity throughout 2020 and 2021—often despite exigent austerity. This workshop invites law firm marketing and business development executives to define and quantify the impact of their departmental value to the broader partnership. How can CMOs socialize the indispensable role of marketing amid fiscal and operational scrutiny?

Facilitators:

**Erin Corbin Meszaros**, *Chief Business Development & Client Service Officer*, Eversheds Sutherland (US) LLP  
**Norm Mullock**, *Vice President, Strategy*, Wilson Allen

---

**5:45PM-7:00PM ET**    **Opening Night Reception**    *Ritz-Carlton Ballroom Foyer & Oceanfront Terrace*  
Please join us for our cocktails and canapés as we reflect upon the day's discussions. Spouses and significant others are welcome.

Exclusively hosted by



---

**DAY TWO**  
**THURSDAY, 20 JANUARY 2022**

---

**7:00AM-8:00AM ET**    **Nature Walk** (please arrive by 6:50am)    *Ritz-Carlton Hotel Lobby*  
Join colleagues for a leisurely and educational tour of local flora and fauna with Ritz-Carlton naturalists. Capacity is limited to 30 total guests.

Exclusively hosted by



---

**8:30AM ET**    Networking Breakfast    *Oceanfront Lawn & Terrace*

Exclusively hosted by



---

**9:20AM-9:30AM ET**    Opening Remarks    *Ritz-Carlton Ballroom Salons I & II*

---

**9:30AM-10:45AM ET**    General Session    *Ritz-Carlton Ballroom Salons I & II*  
**The Bold and the Beautiful: Building the Next-Generation Corporate Legal Department**  
Building or revamping a corporate legal function is no small feat—especially in a global pandemic. Each department has its own set of priorities or needs when it comes to talent acquisition and output. But in a tenuous global economy and era of modest spend, how

resourceful must General Counsel and Chief Legal Officers be to sufficiently service their clients? This conversation offers a candid look at the evolving corporate legal department organizational chart. How are in-house leaders addressing talent needs or skillset gaps within their own team? Where do legal operations personnel, data scientists, or technology specialists sit within the COVID-era business model? And what opportunities exist for law firms and technology partners to ensure their clients' success?

Moderator:

**Dan Currell**, *Managing Director, AdvanceLaw*

Panelists:

**Brian Chevlin**, *Senior Vice President & General Counsel, North America, Pernod Ricard USA*

**Leora Freire**, *Chief Legal Officer, WGI, Inc.*

**Sophia Lee**, *Chief Legal Officer, Altus Power America, Inc.*

**John Page**, *Senior Vice President, Chief Corporate Social Responsibility Officer & Chief Legal Officer, Golden State Foods*

**Alan K. Tse**, *Global Chief Legal Officer & Corporate Secretary, Jones Lang LaSalle*

10:45AM ET-  
11:00AM ET

Morning Break

*Ritz-Carlton Ballroom Foyer*

11:00AM-  
12:00PM ET

Keynote Address

**The River Wild: Leading Change in Risk-Averse Cultures**

Leading transformation in risk-averse cultures is daunting for even the most seasoned professional. Each year, law firm leaders and marketing and business development executives have the ongoing opportunity—if not unenviable task—of introducing new ideas to a partnership of lawyers notoriously adverse to change. And while some firms embrace disruption as a key growth lever, others adopt a more skeptical tone, preferring *iteration* to *innovation* despite the sea change impacting the profession. This January, the Thomson Reuters Institute is proud to welcome renowned digital futurist and bestselling author Brian Solis for a timely and compelling address on engineering growth and challenging rigid paradigms in the modern workspace. Leveraging his experience as Global Innovation Evangelist at Salesforce and work as a digital anthropologist, Mr. Solis invites business leaders to shift their perspectives and “learn to unlearn” what it means to drive disruption, inspire others, and build consensus across the enterprise.

Presenter:

**Brian Solis**, *Digital Futurist & Bestselling Author*

*Ritz-Carlton Ballroom Salons I & II*

12:00PM ET

Networking Luncheon

*Oceanfront Lawn & Terrace*

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

1:15PM-2:30PM ET Breakout Discussions  
*Please join us for three simultaneous discussions dedicated to hot topics in law firm business development and firmwide management.*

**Breakout #1**

*Ritz-Carlton Ballroom Salon III*

**Arrested Development: Law Firm Strategic Planning Around Junior Partners**

Suffice it to say, the past twenty-four months have proven especially challenging for many junior law firm partners. Thanks to a global pandemic, many individuals struggled to establish a core book of business or build upon personal brands within an ever-evolving remote work environment and tepid business climate. Recent Harvard Law School research further attests to a generational shift among legal professionals toward greater work-life balance, alternative career pathways, and improved social awareness on the part of one's employer, colleagues, or self. Viewed through a comprehensive lens, such headwinds augur a potential headache for law firm leaders and professional development peers. This session examines junior partner performance and professional development strategies for the modern COVID era. How does one address common professional, practical, and philosophical sentiments endemic to this key demographic?

Moderator:

**Jonathan Fitzgarrald**, *Managing Partner*, Equinox Strategy Partners

Panelists:

**Adam J. Bass**, *President & Chief Executive Officer*, Buchalter

**Amanda Bruno**, *Chief Business Development Officer*, Morgan, Lewis & Bockius LLP

**Jennifer L. McQueen**, *Director of Client Service*, Miller, Canfield, Paddock and Stone, PLC

**Naim S. Surgeon**, *Partner*, Stroock & Stroock & Lavan LLP

**Breakout #2**

*Plaza Ballroom I*

**Towers of Babel: Managing Disparate Data Across the Firm**

At a given organization, the myriad, often diffuse outreach by partners, associates, marketing, or financial professionals yields important data points around which savvy law firms measure value and client impact. Thanks to third-party providers and in-house systems, tracking and consolidating business intelligence has never been easier. Yet are law firms truly harnessing their data capabilities? This session addresses two core objectives: how to aggregate datapoints that determine client engagement and how to quantify meaningful value at a matter or institutional level. Our panel will share essential guidance on how top



organizations are mastering industry-leading, data-driven growth through scalable and collaborative means.

Moderator:

**Dave Whiteside**, *Director, Client Growth & Success*, CLIENTSFirst Consulting

Panelists:

**Cindy Thurston Bare**, *Senior Director, Firm Intelligence Advisors*, Litera

**Peter Geovanes**, *Head of Data Strategy, AI & Analytics*, Winston & Strawn LLP

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

**Paula Zirinsky**, *Consultant*, Paula Zirinsky LLC

**Breakout #3**

*Plaza Ballroom II*

**Abundant Harvest: Managing Long-Term Merger Strategy and Growth**

Beyond the immediate hurdles expected in law firm combinations, leading firms engage in multi-year strategic planning to maximize business growth. Whether through small acquisitions or massive corporate tie-ups, marketing and client service leaders, given the unique headwinds of late, are focused on flexible, scalable, and *sustainable* revenue roadmaps accounting for (pan-)industry disruption. What lessons can leaders who successfully navigated—or are currently experiencing—organizational transformation share about their revenue strategy? Where and how do our panelists see compelling opportunity with respect to new market presence or practice area(s)?

Moderator:

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

Panelists:

**Jennifer Castleberry**, *Chief Marketing & Business Development Officer*, Foster Garvey PC

**Jason Noble**, *President & Chief Executive Officer*, ikaun

**Anne K. Schuster**, *Chief Marketing Officer*, Thompson Coburn LLP

**Ashley H. Story**, *Chief Operating Officer & Partner*, Troutman Pepper

**Lee Watts**, *Chief Marketing Officer*, Smith, Gambrell & Russell LLP

---

<b>2:30PM ET</b>	Break	<i>Ritz-Carlton Ballroom Foyer</i>
<b>2:45PM-4:00PM ET</b>	General Session <b>Still Waters Run Deep: Aligning Client Acquisition with Enterprise Culture</b>	<i>Ritz-Carlton Ballroom Salons I &amp; II</i>

---

On occasion, a seemingly innocuous new business opportunity or client matter invites reputational risk and inherent tension for the firm. Under such circumstances, and with senior leadership forced to react, marketing and communications teams lead the charge in controlling public narratives or mitigating strife within and outside the organization. Like it or not, a firm’s reputation is only as strong as the integrity of its clients. And senior marketing leaders, well-aware of this truth, recognize that adopting a proactive stance throughout the client conflicts or intake process can help circumvent potential challenges down the road. This session offers essential guidance on managing “toxic” clients for the firm. How are firms reconciling new business development with philosophical or reputational concerns?

Moderator:

**Nicky McHugh**, *Senior Vice President*, The RepTrak Company

Panelists:

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

**John Hellerman**, *President & Founder*, Hellerman Communications

**Chris Hinze**, *Chief Marketing & Business Development Officer*, Steptoe & Johnson LLP

**Gina N. Shishima, Ph.D.**, *Chief Strategy and Operations Partner*, United States, Norton Rose Fulbright US LLP

4:00PM ET-  
4:15PM ET

Break

Ritz-Carlton Ballroom Foyer

4:15PM-5:15PM  
ET

Mixology Roundtables

*Grab a specially crafted cocktail courtesy of our conference sponsors and join three concurrent discussions dedicated to law firm business development and firmwide management.*

**Roundtable #1**

**Steady Progress: Business Development & Client Retention with the Mansfield Rule**

Since its inception, the Mansfield Rule has ostensibly helped firms advance DEI initiatives and meet client expectations on any number of given matters. Alongside the managing partner or executive board, many law firm marketing leaders play a crucial role in helping ensure Mansfield Rule certification *vis-à-vis* ongoing metrics reporting and strategic communications highlighting a vibrant talent pipeline. Yet for all the energies devoted to this noble initiative, are firms truly satisfied with their current ROI? Can more be done—whether internally or externally—to help maximize the Mansfield Rule’s impact across the enterprise? This roundtable invites participants to weigh in on the overall effectiveness of Mansfield Rule certification from a talent management and business development perspective.

Ritz-Carlton Ballroom Salon III

Moderator:

**Nita Cumello**, *Global Client Director*, Thomson Reuters

Panelists:

**K. Martine Cumbermack**, *Partner & Co-Chair, Diversity Committee*, Swift, Currie, McGhee & Hiers, LLP

**L. Suzan Kedron**, *Partner, Business Development Chair, Dallas office; & Chair, Diversity & Inclusion Committee*, Jackson Walker LLP

**Terra Liddell**, *Chief Marketing Officer*, Finnegan, Henderson, Farabow, Garrett & Dunner, LLP

**Daniel R. Owen**, *Chief Strategy & Marketing Officer*, Robins Kaplan LLP

### Roundtable #2

*Plaza Ballroom I*

#### **The Arc of Innovation: Fostering Next-Generation Client Service**

The role of law firm Chief Innovation Officers is a significant development in professional services. Hailing from both within and outside the industry, Chief Innovation Officers (“CINO”) are frequently tasked with differentiating their employer in the market, “operationalizing” new processes and strategies, or reimagining client service across the firm. Technology and marketing teams are crucial partners in effectuating CINO priorities. Their expertise around client account management and the modern customer journey can yield sustained, meaningful success. Leveraging insights from across sectors, this conversation explores the intersection between process improvement and experiential design for the modern professional services organization. How can marketing chiefs and heads of innovation collaborate to transform the enterprise? Where and why can even the most progressive firm augment its client journey?

Moderator:

**Maggie Watkins**, *Senior Client Services Director*, Womble Bond Dickinson (US) LLP

Panelists:

**Jeff Grossman**, *Chief of Strategy & Legal Practice Officer*, Cooley LLP

**Bill Koch**, *Chief Knowledge Officer*, Womble Bond Dickinson (US) LLP

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

### Breakout #3

*Plaza Ballroom II*

#### **Launch Point: 2022 Partner Talks**

*Whether in large or small corporate settings, data science—and business intelligence more broadly—is seen as a crucial pillar around which business and legal professionals measure productivity in a high-stakes environment. Savvy firms search constantly for novel approaches to leveraging proprietary data most effectively, including*

*engagement with trusted technology partners across the profession. This year's Partner Talks offer compelling guidance from three prominent industry providers on the state of law firm data and technology resources today. Please join us for a series of three twenty-minute talks presented in consecutive fashion.*

Partner Talk #1

**Law 4.0: Exploring the Role of Data in the Firm of the Future**

The Fourth Industrial Revolution is blurring the lines between all things physical and technical. In the legal profession, such kinesis is fueling the emergence of Law 4.0—defined as a futureproof mindset where digital transformation and data-driven insights help marketers excel at their craft. This presentation explores the increased opportunities legal industry professionals must embrace as the divide between physical and digital further dissolves.

Presenter:

**Emile Van Den Berg**, *Chief Executive Officer*, Upper Sigma

Hosted by

**UPPER SIGMA**

Partner Talk #2

**It's 10pm, Do You Know Where Your Prospective Clients Are?**

CRM data decays rapidly making it a universal and never-ending challenge. Clients and prospective clients are regularly changing positions or companies and knowing where they are is crucial to capturing new business. This session focuses on the data challenges with staying on top of companies, job titles, locations and contact information. We will review best practices to prioritize your data upkeep, including disposition planning, new lateral partner process, and data audits of top clients and alumni.

Presenter:

**Scott Winter**, *Vice President, Client Development*, Index Solutions

Hosted by

**index**

Partner Talk #3

**Ushering the Legal Industry into the World of Relationship Intelligence**

Relationship intelligence is a core pillar for sustainable law firm success. Helping fill gaps in law firm CRM systems, relationship intelligence affords enhanced visibility into key accounts, mastery of impactful communication strategies, awareness of what clients are—or *are not*—responding to positively, and even a firm's overall level of client influence. This presentation offers key guidance for law firms looking to take client data to the next level. How adept is your firm at Relationship Intelligence? Where can firms bolster client experience before it's too late? And how can firms completing a merger seamlessly engage clients through organizational transformation?

Hosted by

**introhive**

Presenter:

**Jeffery Parrish**, *Head of Industry Strategy*, Introhive

---

**5:15PM-7:00PM** **The Grand Reception**

*Oceanfront Lawn & Terrace*

ET

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

Exclusively hosted by



**DAY THREE**  
**FRIDAY, 21 JANUARY 2022**

---

<b>8:30AM-9:30AM</b> ET	Networking Breakfast	<i>Oceanfront Lawn &amp; Terrace</i>
----------------------------	----------------------	--------------------------------------

---

<b>9:30AM-10:30AM</b> ET	Breakout Discussions	<i>Plaza Ballroom I</i>
-----------------------------	----------------------	-------------------------

Breakout #1:

**One Life to Live: Client Retention and Strategic Account Management through Succession Planning**

According to new Pew Research, 28.6 million Baby Boomers—those born between 1946 and 1964—retired in the third quarter of 2020—a 3.2 million increase over the same quarter in 2019. In the legal profession, with the anticipated exodus of senior partners still largely unrealized, shrewd firms are partnering directly with clients to affect a seamless transition and preserve long-standing, institutional relationships. This conversation solicits insights from in-house counsel and law firm professionals on the art of strategic planning. How empowered should clients feel to discuss a change in their legal representation? What conversations or key considerations must marketing and business development leaders deploy to ensure a warm handoff?

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

Panelists:

**Matt Burnstein**, *Partner & Chair*, Waller Lansden Dortch & Davis, LLP  
**Christopher P. Ende**, *Chief Value Officer*, Goulston & Storrs P.C.  
**Jaimala K. Pai**, *Vice President, General Counsel & Corporate Secretary*, ACIST Medical Systems  
**Daniel Weintraub**, *Managing Director, Chief Administrative & Legal Officer*, Audax Management Company

Breakout #2:

**Seek the Horizon: Competing Upstream in Legal Services**

As New Law and Big Four multinationals continue their onward push, firms large and small find themselves frequently competing upstream to win legal work and maintain market share. Indeed, according to recent Thomson Reuters intelligence, countless hours spent on administrative tasks (e.g. billing & document management), as opposed to practicing law, continues to plague many solo practitioners and boutique firms in need of expansive technological and infrastructure investments. Similarly, large- and medium-sized firm leaders lament the formidable efficiency and price point advantage of their ALSP and Big Four brethren at a moment when the ABA’s passage of Resolution 115 and rise of state-sponsored “regulatory sandbox[es]” suggest even greater industry upheaval to come. This discussion offers a practical take on strategic growth for large and small organizations. Where and how might firms have a tangible advantage over their larger peers?

*Plaza Ballroom II*

Moderator:

**Jennifer Schaller, Esq.**, *Managing Director*, The National Law Review

Panelists:

**Tim Brown**, *Partner*, Reynolds Porter Chamberlain LLP & *Chair*, TerraLex

**Terri Pepper Gavulic**, *Chief Executive Officer*, TerraLex

**Brett Krantz**, *Partner*, Kohrman Jackson & Krantz LLP & *Chair*, Meritas

**J.C. Roper**, *Partner*, Drew Eckl & Farnham, LLP

10:30AM-  
10:45AM ET

Break

*Ritz-Carlton Ballroom  
Foyer*

10:45AM-  
12:00PM ET

General Session

**Another World: The 2022 Marketing Partner Forum Startup Alley**

Each year, the global proliferation of legal tech startups affords law firms and corporate clientele ample opportunity to engage with or deploy an exciting array of inspiring change agents capable of reimagining the profession. As key business decision makers, law firm marketing chiefs routinely select talented business partners capable of reimagining their firm's client experience and overall growth trajectory amid vociferous competition. This year's program concludes with an immersive exhibition of some of the industry's most promising visionaries and disruptors. Join us and meet the newest generation of technology entrepreneurs poised to transform legal services.

*Ritz-Carlton Ballroom  
Salons I & II*

Moderator:

**Joe Raczynski**, *Manager, Technical Client Management*, Thomson Reuters

Panelists:

**Jazz Hampton**, *Chief Executive Officer & General Counsel*, TurnSignal

**Allison Nussbaum**, *Vice President, Client Value*, Pitchly

**Evan Parker, Ph.D.**, *Founder*, Parker Analytics LLC

12:00PM ET

**Bloody Mary Brunch**

Please join us for a relaxed networking brunch as we wrap up this year's program.

*Oceanfront Lawn &  
Terrace*

Exclusively hosted by

