



The Thomson Reuters Institute

proudly presents

The 30th Annual Law Firm Marketing Partner Forum
Songs of Empire: Transformative Journeys & the Quest for Sustainable Growth

January 23-25, 2023

Terranea Resort
100 Terranea Way
Rancho Palos Verdes, CA 90275

Co-Chairs

Silvia L. Coulter, *Principal, Business Development Practice Leader*, LawVision Group, LLC
Peter B. McGlynn, *Partner & Trial Department Chair*, Bernkopf Goodman LLP
Amy Yeung, *Vice President & Deputy General Counsel*, Sallie Mae

PROGRAM (all times local)

Day One

Monday, January 23, 2023

12:00pm

Registration & Welcome Luncheon

Please join us for lunch on the Palos Verdes Terrace as we kick off our Diamond Anniversary program.

Conference 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) to afford two opportunities to participate.

Workshop #1:

In Search of El Dorado: Measuring Profitability & Efficiency in Marketing & Business Development Departments

As many firms look to retrench in the face of an economic downturn, marketing and business development leaders are deploying comprehensive profitability analyses to determine where best to invest, pull back, or reallocate spend. Truly, amid such rampant recessionary fears, recognizing what financial metrics are—or are not—relevant in the current climate is an essential, perhaps *existential*, task. This workshop invites collaborative exploration of financial performance and reporting across the marketing and business development organization(s). What must Chief Marketing Officers or law firm business development committees measure to quantify success?

Facilitators:

Kalisha M. Crawford, *Director of Marketing & Business Development*, Ropers Majeski PC
Deborah Ruffins, *Chief Marketing Officer*, Perkins Coie LLP
Tom Snavelly, *Principal Consultant – Advisory Services*, Thomson Reuters
Madhav Srinivasan, *Chief Financial Officer*, Hunton Andrews Kurth LLP

Workshop #2:

Yggdrasil’s Reach: Maximizing a Global Business Intelligence Strategy

Hybrid work arrangements have only accentuated the role of law firm business intelligence (“BI”) in fostering strategic growth. Aided by myriad technologies and sophisticated data professionals, marketing and business development leaders have an exciting, but no less challenging, opportunity to enhance global brand and allow legal personnel to compete in fertile markets. Inspired by the immense sacred tree (Yggdrasil or “The World Tree”) connecting the Nine Worlds of Norse cosmology, this workshop invites participants to define a more dynamic and cohesive “BI” blueprint across large and/or global organizations. How can business development leaders collaborate on resource allocation and investment? What initiatives are most effective at encouraging adoption across the partnership? Where might technology partners or intrapreneurship yield meaningful returns?

Facilitators:

Lavinia Calvert, *General Manager, Marketing and Business Development Solutions*, Intapp, Inc.
Bruce MacEwen, *President*, Adam Smith, Esq.
Heather Reid, *Chief Business Development & Marketing Officer*, Miles & Stockbridge P.C.
Eleanor Smith, *Chief Client Officer*, Barnes & Thornburg LLP

Workshop #3:

The Ballad of Bear and Beaver: Sustainable Synergy Across Marketing & Law Firm Sales Teams

For indigenous tribes of North America, totem animals are an important facet of ancient mystical cosmology. Among the most revered in Native American culture are bears, reclusive and imposing creatures from whence tribal nations derive strength, courage, and strong-willed, independent spirit. Thanks to their collaborative and communal nature, beavers are also sacred, frequently offering lessons on resourcefulness, creativity, persistence, and harmony at odds with their more aloof counterpart. This striking juxtaposition finds a modern corollary in the growing prominence of law firm sales teams and the evolving Chief Marketing Officer remit. With global business continuing to retrench, how are firms engineering effective sales teams to complement the firm’s marketing and business development department or activities? What role, if any, should the CMO/CBDO play in recruiting and managing sales talent? What requisite skills must today’s CMO/CBMDO embrace to ensure the successful partnership—or integration—with a sales team? Join us for a lively and interactive workshop on achieving sustainable success.

Facilitators:

Steven M. Bell, *Affiliate Consultant*, LawVision Group, LLC
Silvia L. Coulter, *Principal, Business Development Practice Leader*, LawVision Group, LLC
Robert Randolph, *Director of Business Development*, Ice Miller LLP

Small & Midsize Law Firm Track
Conference Workshops
1:00pm–2:30pm

Workshop #1:

Charting Course: Return-to-Office Strategy in Small to Midsize Law Firms

With the modern workforce continuing to diversify across ideological, geographical, ethnic, gender, and generational lines, return-to-office blueprints—even if only two or three days a

week—remain a challenge for many law firm leaders. Ever mindful of weighing individual concerns against broader organizational priorities (including the growing phenomenon of “quiet quitting”), firm executives must evince empathetic leadership in moving the organization forward and ensuring that the “stickiness” of culture remains intact. This discussion ponders modern people management strategy in a hybrid environment. How are firms engineering the *human side* of pandemic-era work with so many disparate voices in the fold?

Facilitators:

Robert Q. Lee, *Managing Partner, Orlando, Brennan, Manna & Diamond*

Brie Leung, *Chief Strategy Officer, Much Shelist, P.C.*

Peter B. McGlynn, *Partner & Trial Department Chair, Bernkopf Goodman LLP (Lead Facilitator)*

Kevin L. Walsh, *Principal & Co-Chair, Client Development Committee, Groom Law Group*

Small & Midsize Law Firm Track

2:45pm–4:15pm

Workshop #2:

The Gates of Janus: A Small to Mid-Size Law Firm Merger Workshop

In Roman mythology, Janus is the god of gates, doorways, and the liminal realm of transitions. Often depicted with two heads representing myriad dualities such as past and future or war and peace, Janus’s modern corollary exists within a world still unfolding and defined by economic ennui. For small and midsize law firm leaders, a rapidly segmenting legal industry has created intriguing opportunities to explore the merits of larger corporate mergers. Guided by strong entrepreneurial instincts (and a fiercely independent spirit), firm executives must assess a litany of concerns, including loss of control, loss of identity, senior partner de-equitization, staff and leadership departures, or pronounced cultural discord. This workshop offers an interactive look at the long and winding journey toward law firm expansion. How do senior leaders measure progress from “blind date” to formal marriage?

Facilitators:

Scott D. Anderson, *Managing Partner, Verrill Dana LLP*

Peter B. McGlynn, *Partner & Trial Department Chair, Bernkopf Goodman LLP (Lead Facilitator)*

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

4:15pm – 4:45pm

Break

Champagne Breakouts

4:45pm – 5:45pm

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

Breakout #1:

Heralds of Bounty: Senior Marketing & Business Development Compensation in the Global Profession

Senior marketing and business development leaders are in high demand across the industry. Embraced, not unlike Hapi, ancient Egyptian god of the Nile inundation, as heralds of prosperity, fertility, and the bountiful harvest, senior marketing and business development leaders are expected to provide veteran leadership amid increasingly hostile headwinds. In an era where escalating talent wars require—for some—divine intervention, whither compensation for accomplished marketing and business development chiefs? Please join us for a comprehensive look at CMO and senior marketer salary trends within midsize and large organizations.

Moderator:

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

Facilitators:

Betsy Donovan, *Head of US Marketing & Business Development*, Withersworldwide

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

Brenda Plowman, *Chief Marketing Officer*, Fasken Martineau DuMoulin LLP

Breakout #2

Between Scylla and Charybdis: Strategy & Risk in Law Firm Social Messaging

As proud members of a moral and ethical vanguard, law firms are embracing polarizing roles as active, often emboldened, corporate citizens. Compelled, in part, by client expectations, firm values and commitments, or inspiration from the local community, the decision to weigh in on any number of sociopolitical issues holds very real and impactful consequences. This roundtable invites participants to share candid thoughts on the remit and ability of marketing and communications leaders to navigate treacherous shores of ardent social activism and tactical abstention.

Moderator:

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

Panelists:

Maura Connell Brandt, *Chief Marketing Officer*, Crowell & Moring LLP

Ashraf Lakhani, *Chief Marketing Officer*, Porter Hedges LLP

Gretchen L. Milbrath, *Director of Business Development & Marketing*, Winthrop & Weinstine, P.A.

Emily Rogers, *Chief Marketing and Business Development Officer*, Norton Rose Fulbright US LLP

Breakout #3:

Agents of Indra: Sensory Marketing in Legal Services

In a digital age awash in social media, apps, and websites, businesses are finding it increasingly challenging to communicate effectively with clients. Indeed, against the cacophonous scourge of information overload, many marketing leaders seek novel ways of building an effective narrative to entice (and enthrall) their audience. Fortunately, new academic research into haptics—the science of how touch impacts emotions, perceptions and memories—suggests a largely untapped path forward in the modern customer journey. For many professional services providers, despite the ostensive incongruity with traditional product output, sensory marketing is an intriguing concept worth exploring across digital frontiers. Inspired by Indra, the lord of heaven in Hindu mythology who imbued man with five senses, this conversation solicits creative discourse around the possibility and promise of haptic technology in a mercurial market.

Facilitators:

Dawn Michalak, *Director of Business Development*, Right Hat

Lorrie Thomas Ross, *Chief Executive Officer and The Marketing Therapist®*, Web Marketing Therapy, Inc.

Breakout #4:

Heralds of Means: Competing on a Modest Marketing Budget (Small & Midsize Law Firm Track)

When it comes to legal marketing spend, bigger isn't always better. Indeed, in a fiercely competitive landscape, small to mid-size law firms are capable of outmaneuvering larger, wealthier brethren through shrewd and creative means belying their modest budgets. This session highlights strategic techniques for maximizing market impact and building a top-tier brand. What

challenges and opportunities—whether within or without—has the pandemic presented to the firm? How are leaders leveraging in-house resources or cultivating business development skills across the organization? What key partnerships or technology providers can help facilitate growth?

Moderator:

Maggie T. Watkins, *Chief Executive Officer*, Maggie T. Watkins Consulting

Presenters:

Tara A. Archer-Glasgow, *Partner; Chair, Litigation & Intellectual Property Practices; Co-Chair, Marketing & Business Development Committee*, Higgs & Johnson

Chris Fritsch, *President & Client Success Consultant*, CLIENTSFirst Consulting

Jason M. Mulgrew, *Chief Business Development & Strategy Officer*, Kleinberg, Kaplan, Wolff & Cohen, P.C.

Amy R. Patton, *Partner & Co-Chair, Marketing & Business Development Committee*, Payne & Fears LLP

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

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

Day Two

Tuesday, January 24, 2023

8:30am – 9:30am Networking Breakfast

Please join peers and industry colleagues on the Palos Verdes Terrace.

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

9:30am – 10:30am The Oracle’s Temple: The State of the Global Legal Marketing & Business Development Profession

For an industry accustomed to weathering storms, the legal profession’s resiliency in the wake of recent challenges has been nothing short of remarkable. Indeed, financial performance aside, the continued evolution of a sector long perceived as anachronistic has yielded significant—and at times extraordinary—transformations around technology, talent, service delivery, and growth. Against the backdrop of prolific geopolitical unrest, this presentation builds upon exclusive Thomson Reuters Institute survey data and proprietary research on the current and future state of legal marketing and business development. How equipped are firms and legal marketing personnel to embrace a new risk environment?

Presenters:

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

Brent Turner, *Director, Advisory Services*, Thomson Reuters Institute

10:30am – 10:45am Morning Break

10:45am – 12:00pm

The New World: Cultural Transformation & the Modern General Counsel

It goes without saying that Chief Legal Officers and General Counsel have long viewed enterprise risk management as a core job responsibility. Yet, even before COVID-19 reset the calculus for modern business, an emphasis on health, well-being, and (pro)active corporate citizenship thrust many legal leaders into less conventional roles as change drivers around culture and organizational creativity. This conversation examines the ongoing evolution of Chief Legal Officer and General Counsel roles today. In an era of increasingly lean staff and support structures, do Chief Legal Officers and General Counsel have the requisite resources to succeed? Or might outside counsel be well-positioned to assist?

Moderator:

Amy Yeung, *Vice President & Deputy General Counsel*, Sallie Mae

Panelists:

Cheryl Graden, *Chief Legal & Enterprise Corporate Affairs Officer and Corporate Secretary*, TMX Group

Frederick W. Stein, *Chief Legal Officer*, Chicken Soup for the Soul Entertainment, Inc.

Christopher Updike, *General Counsel*, Stretto

12:00pm – 1:00pm

Networking Luncheon

Please join peers and industry colleagues on the Palos Verdes Terrace.

1:00pm – 1:15pm

Break

1:15pm – 2:30pm

Breakout Discussions

Please join us for four simultaneous discussions dedicated to law firm business development and firmwide management.

Breakout #1:

Arachne's Web: Maximizing Alumni Network Impact in Law Firm Business Development

Law firm alumni relations networks have historically functioned as levers for talent recruitment, lateral pipelines, brand advocacy, and public relations. More recently, savvy firms have also begun harnessing alumni networks to cultivate new business opportunities or retain lucrative work. This conversation offers a practical look at strategic success and exciting opportunity within multidimensional alumni relations programs. How are firms suturing human capital strategy with marketing and business development teams to win in a dynamic business age?

Moderator:

Ellen C. Auwarter, *Marketing & Business Development Manager*, Duane Morris LLP

Panelists:

Jessica Bolf, *Senior Director of Alliances*, Introhive

David Chun, *Founder & Chief Executive Officer*, Equilar, Inc.

Theresa DeLoach, *Managing Director, Strategic Alumni Engagement & Client Relations*, Goodwin Procter LLP

Cheri Husney, *Chief Marketing & Business Development Officer*, Littler Mendelson P.C.

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

Breakout #2:

The Forge of Kagutsuchi: Crafting Strategic Relations Across the Partnership

The most successful law firm marketing and business development leaders are known for their relationships across the broader partnership. Whether at the executive committee or practice group leader level, savvy Chief Marketing Officers understand how to connect, collaborate, and strategically support firm partners to foster influence and greater awareness around their department's achievements. Harkening to the flames of Kagutsuchi, the Japanese god of fire, or his Greek counterpart Hephaestus, this session offers candid guidance on the craft of building sustainable rapport across offices, departments, and geographies. Emphasis will be given to ways in which marketing and business development teams can create valuable feedback loops, engender necessary support, and be seen as a strategic resource.

Moderator:

David S. Schaefer, *Managing Director*, Calibrate

Panelists:

John C. Albrighton, *Marketing & Business Development Director*, Neal, Gerber & Eisenberg LLP

Jeff Berardi, *Partner*, Baretz+Brunelle LLC

Ashley Horne, *Chief Marketing Officer*, Womble Bond Dickinson (US) LLP

Koree Khongphand-Buckman, *Chief Marketing and Business Development Officer*, Foley & Lardner LLP

Breakout #3:

A Tale of Two Horizons: Rebranding the Modern Law Firm

Amid market consolidation and lateral activity, law firm leaders are occasionally tasked with engineering successful law firm rebrands or dramatic organizational change. Less a sprint than a journey, this process requires extensive research and collaborative planning both within and outside one's enterprise walls. Much like the Egyptian sun god Ra, whose celestial voyage in his solar barque brought light (and life) to two horizons, the ability of marketing and firm executives to deftly guide the firm's journey from dusk till dawn is not without its challenges. Please join us for a candid roundtable on best practices and lessons learned in leading a bold transformation.

Moderator:

Eric Dewey, *Principal and Consultant*, Group Dewey Consulting

Panelists:

Patty Azimi, *Director of Client Strategy*, Index Solutions Inc.

Melanie Green, *Chief Marketing and Business Development Officer*, Fish & Richardson P.C.

Nancy Kostakos, *Chief Marketing Officer*, Cooley LLP

Cynthia A. McCollough, *Owner & Principal*, McCollough Consulting LLC

Breakout #4:

Soldiers of Fortune: Lateral Hiring Strategy in Small & Midsize Firms (Small & Midsize Law Firm Track)

History is filled with fabled mercenaries and nomadic warriors who helped shape the world of empire. From the Hellenic Ten Thousand to the American “Flying Tigers,” the acquisition of elite talent remains a popular stratagem in an increasingly fraught, global battlefield. At small to midsize law firms, selective lateral hiring is a core catalyst for growth. But even the most optimistic leader might concede that risks far outweigh rewards when it comes to employing the right individual. This panel offers candid guidance on navigating senior associate, equity, or non-equity partner hires. How have firms engineered sustained success despite daunting odds? What role do business development personnel play in helping assess, hire, and successfully onboard talent?

Moderator:

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

Panelists:

Robin Gerard, *Chief Marketing Officer*, Stradling Yocca Carlson & Rauth

Randall S. Leff, *Co-Managing Partner*, Ervin Cohen & Jessup LLP

Kajsa M. Minor, *Hiring Partner & Management Committee Member*, Shartsis Friese LLP

Eric J. Monzo, *Partner, Executive Committee Member, & Marketing Committee Chair*, Morris James LLP

2:30pm – 2:45pm

Break

2:45pm – 3:45pm

Conference Keynote:

Radical Candor & the New Face of Leadership

Leading with confidence, compassion, conviction, and clarity are crucial traits for modern business leaders. Whether at growing technology startups or more mature corporate entities, recognizing the strengths and weaknesses of one’s leadership style are crucial to succeeding in an increasingly dynamic business climate. This year, in keeping with our program theme of transformative journeys, the Thomson Reuters Institute is honored to host *New York Times* bestselling author and executive coach Kim Scott for a timely and compelling talk on adaptive leadership and new management philosophies to help improve workplace relationships and drive results. Building upon her groundbreaking monograph *Radical Candor*, Ms. Scott share her latest research on being a more effective—and respected—boss in both large and small organizations.

Presenter:

Kim Scott, *Author, Just Work & Radical Candor; Co-Founder*, Radical Candor

3:45pm – 4:00pm

Break

4:00pm – 5:15pm

Breakout Discussions

Join us for four concurrent discussions dedicated to law firm business development and firmwide management.

Breakout #1:

Scheherazade's Grace: Law Firm Content Strategy and the Evolving MarTech Stack

In *The Arabian Nights*, Scheherazade, learned daughter of the vizier of the court of Shahryar and new bride to the Persian ruler, mesmerizes her husband (and ultimately staves off death) with wondrous tales spanning one thousand and one (sleepless) nights. For law firms, offering clients a steady stream of compelling content is a similar tactic, albeit with slightly less dire (though no less critical) stakes. Now, with recent events shifting client proclivities toward more digital, on-demand consumption, scrutiny around content planning and the existing marketing technology stack is a valuable business exercise. This session offers a rigorous examination of modern content creation and technology platforms across the profession. How are law firms (re)evaluating the way clients access and digest insights? Where and how might marketing technology be reimaged to best suit client needs?

Moderator:

Connor Kinnear, *Chief Marketing Officer*, Passle

Panelists:

David Bruns, *Director of Client Services*, Farella Braun + Martel LLP

Gina Carriuolo, *Chief Marketing Officer*, Robinson+Cole LLP

Adrian Lürssen, *Co-Founder & Vice President, Strategic Development*, JD Supra

John W. Sterling, *Chief Strategy and Practice Development Officer*, Chapman and Cutler LLP

Breakout #2:

The Sixth Sun Rises: Pursuing Law Firm Partnerships & Growth in Emerging Markets

Aztec mythology speaks of the legend of the five suns and creation of the modern world. Each sun's rise coincides with a period of metamorphosis and growth. For the contemporary legal services market, recessionary fears and a decline in legal work have led forward-looking firms to pursue partnerships in emerging markets and developing countries. Indeed, despite economic forecasts to the contrary, opportunities for work in Latin America, Africa, Asia, and Eastern Europe exist for firms bold enough to navigate risk in their quest for profitability. Please join us as our distinguished panel considers firmwide strategy and global execution amid ubiquitous geopolitical unrest.

Moderator:

Jonathan Fitzgarrald, *Managing Partner*, Equinox Strategy Partners

Panelists:

Juan Pablo M. Cardinal, *Executive Committee Member*, ALLY Law; *Managing Partner*, Richards Cardinal Tutzer Zabala Zaefferer

Masahisa Mitsunaga, *Shareholder & Chair, Japan Practice*, Buchalter, PC

Premjit Panicker, *General Counsel*, GoDigital Media Group

Juan Zúñiga, *Managing Partner*, Rimon, P.C.

Breakout #3:

2023 Partner Talks

Please join us for a series of brief executive presentations from some of our conference sponsors.

Partner Talk #1:

Money on the Table: The Cost of Outdated Business Development Systems

In a recent industry study, 87% of firms report that their business development and marketing teams are under-resourced. When law firms cannot find (or choose not to budget for) the talent to enable revenue generators, their BD systems become inefficient and ineffective. Over the last two years, unprecedented client demand has deprioritized business development. But as markets soften, firms will need to refocus on entrepreneurialism to stay competitive. Those who modernize their BD systems and technologies will pull ahead. This program will lay out the framework and benefits available from a modern approach to business development.

Presenter:

David Ackert, M.A., *President, Ackert*

*

Partner Talk #2:

Pursue the Grail: Engineering Recruitment Strategy of Marketing and Business Development Professionals

When it comes to sophisticated recruitment strategies, law firms typically fall short in their pursuit of top business developers and marketing talent. Recent years have underscored how recruitment strategy gaps contribute to open roles taking too long to fill or job postings failing to attract qualified candidates with the right technical skills or cultural fit. Add to this tableau growing concerns over escalating salary expectations and demands, and it's easy to see why many firms—and by extension, top business development and marketing professionals—cast a jaundiced eye upon often transactional, even thoughtless, approaches to talent acquisition. This presentation offers a paradigm shift on how to engage, entice, and secure top business development and marketing personnel. How might firms embrace a more personalized and purposeful strategy in our modern business landscape?

Presenter:

Kate Harry Shipham, *Principal, KHS People LLC*

*

Partner Talk #3:

Building the Bifröst: New DEI Content Strategies for Pitches and Proposals

Amid the legal profession's push for greater diversity, equity, and inclusion ("DE&I")—and whether in both anticipation of or response to client demand, leading firms are incorporating compelling DE&I-focused content into their business development processes. This presentation offers a compelling real-world case study on how to differentiate your pitches and proposals through valuable and relevant data points. Participants will discover innovative strategies and best practices for winning work and creating dashboards that show firmwide progress on key DE&I objectives.

Presenters:

Leah N. Fisher, *Director of Inclusion & Diversity, Baker & Hostetler LLP*

Jason Noble, *President, ikaun*

*

Partner Talk #4:

Divine Intervention: Rethinking Go-To-Market Strategy in Law Firms

Since the great financial crisis of 2008, profit growth at many law firms has been relatively modest, despite an increasing demand for legal services and short-term revenue windfall in the wake of firmwide austerity. The question, of course, is why? In this partner talk, law firms marketing and business development leaders will discover why today's current go-to-market tactics are failing to capture demand for legal services (while getting ever more expensive); why today's go-to-marketing tactics are actually *hurting* law firm brands by not being client-centric; and why *revenue operations* is emerging as a new type of go-to-market model that both captures demand for legal services and priorities client needs.

Presenters:

Philipp Thurner, *Chief Executive Officer & Founder*, Nexl

Ben Chiriboga, *Chief Growth Officer*, Nexl

Breakout #4:

Itzamná's Trace: Leveraging Social Media for Maximum Impact (Small & Midsize Law Firm Track)

Many civilizations attribute the gift of writing to that of sacred deities. Thoth was the Egyptian god of wisdom and scribe to the gods; Hermes (or Mercury to the Romans) was viewed as the creator of the Greek alphabet; Odin invented the runes in Norse mythology; and Itzamná, the Mayan ruler of heaven, was said to have brought writing to Mesoamerica. In modern times, social media is *de rigueur* with regard to mass communication, content consumption, and the populist archive of history; and at small to midsize firms, recognizing how best to leverage this asset can unlock the cipher of success. This presentation examines the latest social media strategies leveraged by leading firms. How and where are small to midsize legal service providers getting the most bang for their buck?

Moderator:

Andrea Arteaga, *Director of Marketing & Business Development*, Grossman Roth Yaffa Cohen

Panelists:

Robyn Addis, *Chief Marketing and Business Development Officer & Chief Operating Officer*, Legal Internet Solutions Incorporated

Jacob Eidinger, *Marketing & Communications Manager*, Crumiller P.C.

Anne Kunkel, *Chief Marketing Officer*, Redgrave LLP

Gina Rubel, *Chief Executive Officer & General Counsel*, Furia Rubel Communications, Inc.

5:15pm – 7:00pm

The Grand Reception

Please join us for cocktails and canapés on the Palos Verdes Meadows. Spouses and significant others are welcome.

Day Three

Wednesday, January 25, 2023

8:30am – 9:30am

Networking Breakfast

Please join us for breakfast on the Palos Verdes Terrace.

9:30am – 10:30am

Breakout Discussions

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

Breakout #1:

Collective Company: Scalable Cross-Selling in Modern Client Management

According to new Thomson Reuters Market Insights research, 21% of Stand-out lawyers (predominantly partners) and 46% of law firm associates are “unsure, somewhat likely, or highly likely” to depart their firm within the next two years—perhaps the strongest indicator yet of extraordinary change unfolding across the profession. Such marked turnover has obvious ramifications for key client accounts and client relationships, and many astute firm leaders recognize the importance of expanding client relationships across multiple lawyers and business professionals to preserve an ideal and sustainable customer experience. This session examines the nuances of effective cross-selling in the modern law firm. Leveraging insights from corporate clients, law firm leaders, and industry partners, our panel delivers key considerations for scalable success.

Moderator:

Janet Stanton, *Partner*, Adam Smith, Esq.

Panelists:

Samir (Sam) A. Gandhi, *Partner; Global Practice Leader, Capital Markets; Executive Committee member; Co-Managing Partner, New York office; Co-Chair, Marketing & Practice Development Committee*, Sidley Austin LLP

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

James T. (Tim) Shearin, *Member & Chairman Emeritus*, Pullman & Comley LLC

Cynthia P. Voth, *Chief Client Officer*, Miller Nash LLP

Breakout #2:

Pixiu's Promise: New Compensation & Staffing Models for the C-Suite

Talent management in a pandemic era persists through divergent and dynamic means. When not defining hybrid working models or (re)calibrating office strategy, many C-suite officers find themselves grappling with increasingly complex compensation questions involving top or rising talent. In a nod to Pixiu, the mythical Chinese hybrid creature who brought wealth and good fortune to its bearer, this workshop asks not *what* (or *whom*) each firm can afford to pay, but what *makes sense* for a given department? What impact will an anticipated revenue decline have on departmental staffing models? How are senior leaders incorporating notions of “culture” and “value” within compensation planning? Is the current industry arms race truly sustainable? And perhaps, most intriguingly, are heightened attrition levels emblematic of short-term social disruption or much broader, institutional change?

Moderator:

Marcie Borgal Shunk, *President & Founder*, The Tilt Institute

Panelists:

Molly Klein, *Chief Marketing Officer*, Davis Wright Tremaine LLP

Marci Taylor, *Principal, Law Firm Advisory Services*, Withum Smith+Brown, PC

Paul L. Tetzloff, *Firm Managing Partner*, Newmeyer & Dillion LLP

C. Bradley Vynalek, *Firm President*, Quarles & Brady LLP

10:30am – 10:45am Break

10:45am – 12:00pm Breakout Discussions

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

Breakout #1:

Traverse the Stargate: Legal Marketing & Business Development Strategy Around Web3 Technologies

Sri Lanka's sacred city of Rajarata ("The Land of Kings") is home to one of the world's oldest artifacts, an ancient "stargate" carved into rock near three Buddhist temples. Scholars, locals, and tourists remain mystified by the stargate's purpose, but popular legend holds that this 6500-year-old sculpture depicts a wheel of the universe through which divine entities explored new realms. For legal services providers, similar urges of wanderlust may be sated in the form of digital expansion. Once the stuff of science fiction and fantasy, decentralized virtual planes and blockchains contain discrete economies and world-building potential rife with possibility and promise. This discussion explores the scale and impact of Web3's allure on modern commerce. How and where might this latest evolutionary leap influence the next generation of legal clients?

Moderator:

Joe Raczynski, *Technologist, Futurist, & Founder*, Joe Technologist

Panelists:

Neel Lilani, *Global Head – Technology Clients*, Orrick, Herrington & Sutcliffe LLP

Linda Novosel, *Chief Innovation & Value Officer*, Blank Rome LLP

Adam Stock, *Head of Legal Operations and Financial Compliance*, Tools for Humanity/Worldcoin

Abby Winckler, *Marketing Director*, Falcon Rappaport & Berkman LLP

Breakout #2:

Ragnarök: Exiting Global Markets or Politically Challenged Practices

Every civilization holds myths about the end of days. In the legal services profession, the decision to exit a certain market—or even a controversial practice—can be an unwelcome but no less pivotal play in a longer, more lucrative game of thrones. As key figures in ensuring minimal disruption to firm operations and client accounts, marketing and communications teams shoulder a heavy burden with tangible, real-world consequences to the firm's bottom line. What approaches have proven most effective in collaborating with firm peers and preserving client relationships? How can firms control the narrative on communications and brand perception in the global public square or deal with politically thorny cases and clients?

Moderator:

Stacey Morrow, *Enterprise Account Executive*, Upper Sigma

Panelists:

Julia V. Bennett, *Chief Marketing Officer*, Brown Rudnick LLP

Simone Hughes, *Director, Business Development and Marketing*, Gowling WLG

Kathryn B. McGlynn, *Managing Director*, AlixPartners

Breakout #3:

The Advancing Armada: Competing on Pricing for Small to Midsize Firms (Small to Midsize Law Firm Track)

The defeat of King Phillip II's Spanish Armada in 1588 by Queen Elizabeth I's smaller, more agile English fleet is not only rife with Biblical significance, but one of the most important military victories in British history as well. That the Duke of Medina Sidonia's imposing (if ponderous) Spanish galleons could be outmaneuvered by the tactical brilliance of Sir Francis Drake is a valuable lesson for small to midsize law firms looking to ward off larger competitors and capture legal work. This interactive session shares strategic guidance on creative and convincing ways to compete with hourly rates. Is bigger truly better or merely more expensive when it comes to legal services?

Moderator:

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

Panelists:

David Cohen, *General Counsel*, Tempus Ex Machina, Inc.

Justin Ergler, *Director, Alternative Fee Intelligence and Analytics & Global External Legal Relations*, GSK

Patrick Johansen, CPP, *Business Development Director*, Lerner David Littenberg Krumholz & Mentlik LLP

Amy Yeung, *Vice President & Deputy General Counsel*, Sallie Mae

12:00pm

Diamond Anniversary Bloody Mary Brunch

Please join us for cocktails (and potential dolphin viewing) on the Palos Verdes Terrace. Spouses and significant others welcome.