

FIRMTHINK 2020

THE FUTURE OF LAW FIRM STRATEGY

The only top level strategy meeting that brings together thought leaders, innovators and critical thinkers from inside and beyond the legal industry to provide practical solutions for how the law firm of tomorrow can thrive in a radically changed business environment.

JUNE 16-17, 2014 | THE CONFERENCE BOARD | NEW YORK CITY

www.momentumevents.com/FirmThink

FEATURING CONTRIBUTIONS FROM:



Ragna Bell
Strategic Market Intelligence Leader
EY Knowledge
Ernst & Young LLP



Greg Fleischmann
Director of Global Marketing
Baker & McKenzie



Anthony Paonita
Editor in Chief
Corporate Counsel Magazine



Wendy L. Bernero
Chief of Strategic Initiatives
Proskauer



Joseph M. Leccese
Chairman of the Firm
Proskauer



Harry Trueheart
Chairman Emeritus
Nixon Peabody



Rebecca Crotts
Senior Director, Global Talent
Management and Development
eBay, Inc



Jim Michalowicz
Managing Director
Huron Consulting Group



Angela B. Styles
Partner
Co-Chair, Government
Contracts Group
Executive Committee Member
Crowell & Moring



José Cunningham
Chief Marketing &
Business Development Officer
Crowell & Moring



Kristan Morrell
Chief Operating Officer
Dickstein Shapiro LLP



Trevor Faure
Global General Counsel
Partner, Legal Services
Ernst & Young Global



Lara Nichols
Global Business and
Technology Executive

“The key to a firm’s long-term success will depend on strong and flexible leaders whose strategy reflects the realities of the legal market and a will to change the status quo.”

—Bloomberg Business Week
January 3, 2014

DISTINGUISHED CO-CHAIRS:



Jennifer Manton
Chief Marketing Officer
Loeb & Loeb



Jasmine Trillos-Decarie
Director of Marketing
Foley-Hoag



The question is no longer if law firms will change, but rather how they will change. How will talent management, analytics, strategy and leadership define the next generation of law firm success? What can today's smart firm do to not only take advantage of new opportunities, but also mitigate the risk from existing – and yet unknown challenges.

Its time to move beyond the theoretical and address the issues that will define whether today's law firm is even prepared to exist, yet alone grow by 2020 and beyond:

OUTSIDE LOOKING IN: BEYOND THE LEGAL INDUSTRY

- How do companies like the **NASDAQ** use analytics to predict the next potential class of IPO candidates and how can your firm use the same approach to identify trends that can impact client retention, expansion and acquisition?
- What can **eBay's** approach towards recruiting, retaining and managing multi-generational talent teach your firm about staying competitive with the talent of today – and tomorrow?
- How would **EY Knowledge's** Strategic Market Intelligence Leader build a competitive intelligence capability from scratch for a professional services firm based on decades of knowledge and how can today's firm action that design immediately?
- How did an executive with multi-industry expertise at companies like **Wells Fargo** and **Merck** deploy effective change and talent management strategies during times of extraordinary industry change, and what can today's law firm learn from her experience as the legal industry continues to face major paradigm shifts?
- How did **EY** apply world-class business and behavioral principles, such as Six Sigma, return on invested capital, zero-sum game theory and neuro-linguistic programming to the practice of law for the first time with tangible results and how can you begin incorporating some or all the elements of this approach at your firm?
- How is **Huron Consulting Group** deploying "Litametrics", the application of analytics to improve decision-making to deliver desired litigation outcomes, for in-house counsel how can today's firm use the same strategy to gain a competitive edge through proactive adoption?

INSIDE LOOKING OUT: PERSPECTIVE FROM THE LEGAL INDUSTRY

- Leadership is the greatest risk to the future of the modern law firm. How does the Chairman and Chief Executive Officer of a firm like **Proskauer** feel the industry can address this challenge and what insights from their experiences can attendees gain in order to ensure the survival and growth of their own firm?
- How can the Chief Operating Officer of **Dickstein Shapiro** and the Chief Strategy Officer for **Proskauer** develop, convince, deploy and manage a marketing, communications and business development strategy that also has responsibility for public relations, client and business development, advertising, events, client relations and technology-related marketing?
- How is **Crowell & Moring**, deconstructing the "lawyer vs. non-lawyer" barrier across the firm to drive diversity of opinion, engagement and contribution by all members of its workforce while also being utilized as a major growth asset for business retention and development?
- How does one of the largest law firms in the world, **Baker McKenzie**, undertake the process of building a sales culture from hiring through deployment and management and how can your firm commence, advance or more effectively manage this business transformation?



THE CO-CHAIRS' PERSPECTIVES

“There’s no question that the legal industry has changed and is continuing to change at a greater velocity than ever before. There are many contributing factors and opinions about why, but technology is the cornerstone. The new leaner, hyper client-focused and more efficient legal services industry that is emerging is exciting, and offers plenty of opportunity for those law firms that can not only adapt, but get in front of and lead the next wave of growth.”



Jennifer Manton
Chief Marketing Officer
Loeb & Loeb

“Now, for the first time, the leaders of the legal industry will gain access to the unique education and business insights offered to thousands of Fortune 500 executives at **FirmThink 2020** presented by The Conference Board and Momentum Event group. Attendees will gain an unparalleled learning and networking opportunity that offers perspectives on key **strategic and practical** considerations and questions.”



Jasmine Trillos-Decarie
Director of Marketing
Foley-Hoag

ABOUT THE EVENT DESIGN

FirmThink 2020 will be limited to 50 attendees in order to ensure an interactive and highly participatory environment. Speakers have been asked to limited their presentations to no more than 20 minutes and to keep PowerPoint s to a minimum, if not unused.

There will be group discussion and crossfire and the audience will have every opportunity to ask the questions that matter most to them. At **FirmThink 2020**, everyone participates.

Reservations are now being accepted though attendance cannot be guaranteed without a completed transaction by visiting www.momentumevents.com/FirmThink.

ABOUT THE FORMAT

FirmThink 2020 will be following the Chatham House Rule designed to provide anonymity to speakers and to encourage openness and the sharing of information.

WHO WILL BE INVITED

Attendance at FirmThink 2020 will be by invitation only and include law firm executives responsible for crafting, deploying, communicating and managing elements of the annual growth strategy including:

- Chairman of the Firm
- Chief Strategy Officers
- Chief Business Development Officers
- Chief Financial Officers
- Managing Partner
- Chief Marketing Officers
- Chief Information Officers
- Directors of Marketing, Communication, Strategy, Talent, Finance



Follow Us on Twitter:
[@Conferenceboard](https://twitter.com/Conferenceboard)



Follow Us on Twitter:
[@momentumeventco](https://twitter.com/momentumeventco)

ABOUT MOMENTUM

HOW WE DIFFER

Momentum Event Group is an international company that is on a mission to make attending conferences truly valuable again. By providing every delegate with the highest quality speakers, content and format, full access to the attendee list via MomentumConnect, complimentary workshop and webinar attendance, and a host of innovative amenities all at an attractive price point, we are re-setting the conference experience.

With complimentary Wi-Fi, reinigorated content formats and multiple networking breaks to ensure maximum facetime, Momentum events are a centralized hub for fueling learning, partnering and idea exchange. With access to Momentum Hosts who ensure the smooth running of the event and answer any questions you have, a “match and meet” service, a money-back guarantee and a programming format that blends the dissemination of critical information with the need for intimate discussion, Momentum Events are unlike any other event you have ever experienced.



ALL-INCLUSIVE PRICING

We charge one price for access to all aspects of the event—general session, workshops and master classes.



NETWORKING

All attendees are provided with access to their fellow registered delegates in advance of the conference. Start developing relationships on your schedule.



MOMENTUM CONNECT

A **LinkedIn** powered online community designed to enhance the networking experience associated with attending the event.



MOMENTUM HOSTS

Our pleasant and professional hand-picked team of greeters and problem solvers have been specially trained to facilitate the best possible conference experience.



POST EVENT ACTIVATION WEBINARS

We offer up to three free post-event webinars to help maintain your connection with fellow attendees and continue your learning months after the conference concludes.



MATCH AND MEET

Services to help facilitate your introduction to the right people at the event to make your conference time even more productive.



A GUARANTEE

We offer a money-back guarantee. If you attend this event and are dissatisfied simply tell us and we will refund your money in full. This eliminates any risk for you and helps our team focus on always providing an exceptional event experience.



ABOUT THE CONFERENCE BOARD

THE CONFERENCE BOARD
Trusted Insights for Business Worldwide



The Conference Board is a global, independent business membership and research association working in the public interest. Our mission is unique: To provide the world's leading

organizations with the practical knowledge they need to improve their performance and better serve society.

Founded in 1916, The Conference Board is an objective, independent source of economic and business knowledge with one agenda: to help our member companies understand and deal with the most critical issues of our time.

We conduct research and convene business leaders in forums large and small, public and private. The insights captured through our extensive network feed directly back into our research and meeting agendas, ensuring that our activities remain sharply focused on the key issues of the day.

The Conference Board works within and across three main subject areas - Corporate Leadership; Economy & Business Environment; and Human Capital - to create a unique, enterprise-wide perspective that helps business leaders respond today, anticipate tomorrow, and make the right strategic decisions every day.

ABOUT THE VENUE

The Conference Board • 845 Third Avenue • New York, New York 10022

The Conference Board's New York meeting facility is a state of the art workspace that has been recently constructed on a modern technological and functional framework. Please be sure to bring your photo ID as confirmed identification is required to gain entry to the building.



MAIN CONFERENCE AGENDA

Day One - Monday, June 16, 2014

12:00PM Registration and Lunch

1:15PM Opening Remarks



Jennifer Manton
Chief Marketing Officer
Loeb & Loeb



Jasmine Trillos-Decarie
Director of Marketing
Foley Hoag

1:45PM **ELO: EXPERIENTIAL LEARNING OPPORTUNITY**

The Smarter Legal Model: Aligning your strategy with your client's imperatives in the modern economy.

Imagine if you could help drive a 27% reduction in legal fees, a 60% reduction in litigation volume and demonstrable improvements in client satisfaction? While some law firms still struggle to answer "if" they should be changing their business model, their clients have moved beyond the "if" and are squarely focused on the "how". The quicker firms can adapt to this new mindset, the quicker they can begin to drive greater client satisfaction and retention.

The "Smarter Legal Model" has been designed to achieve:

- More legal coverage with less headcount - achieved by increasing individual productivity and potential.
- More legal coverage for less cost - achieved by increasing the efficiency and impact of external spend.
- More compliance and client satisfaction at the same time - achieved by helping clients to help themselves.

In this session, Trevor Faure, the author of "The Smarter Legal Model" will address in depth his research on why the market wants change and what solutions the client community is looking for.



Trevor Faure
Global General Counsel
Partner, Legal Services
Ernst & Young Global

2:45PM Break

3:15PM **BIG DATA & ANALYTICS: HOW CAN TODAY'S LAW FIRM USE VAST QUANTITIES OF INFORMATION TO IDENTIFY TRENDS, PROSPECTIVE CLIENTS AND THE NEXT "BIG THING"?**

Jim Michalowicz was one of the early pioneers of making better decisions by unleashing the power of data resulting in measurable improvement in the delivery of legal services before it became more conventionally known as "Big Data". Termed "Litametrics™", this process was developed by Jim through his construction of performance metrics, early case assessment protocols and value based fee models in his prior roles as Legal Services Manager and Litigation Program Manager at DuPont and Tyco.

In this session, Jim will walk through the ways this analytical, data-driven mindset can be used to provide today's law firm with a competitive advantage in not only developing new clients, but effecting greater outcomes and client satisfaction.



Jim Michalowicz
Managing Director
Huron Consulting Group

Additional presenter to be confirmed

4:15PM **DECONSTRUCTING THE LAST BASTION OF MEDIEVAL GUILDS**

The legal industry remains one of the only sectors left that divide its workforce in a binary manner. "Lawyer vs. non-lawyer" designations are prevalent on websites, brochures and in board rooms although this mentality has been shown to stunt growth, depress innovation and eventually lead to decreased client service and loyalty. Hear how Crowell & Moring has and continues to deconstruct these barriers to drive diversity of opinion, engagement and contribution by all members of its workforce, regardless of degree or designation. Understand how inclusion can become a growth asset, not a risk as firm competition for business and talent only continues to increase. Specifically hear how inclusion impacts:

- Firm Economics
- Lateral Recruitment & Retention
- CI
- Strategy and New Business Development

In this session, each participant will interview the other by asking 5 thought provoking questions. Audience participation at the conclusion of the interview will be strongly encouraged.



José Cunningham
Chief Marketing & Business Development Officer
Crowell & Moring



Angela B. Styles
Partner
Co-Chair, Government Contracts Group
Executive Committee Member
Crowell & Moring

5:00PM End of Day 1

MAIN CONFERENCE AGENDA

Day Two - Tuesday, June 17, 2014

8:30AM Breakfast

9:30AM Opening Remarks, Day 1 Summary

8:30AM ELO: EXPERIENTIAL LEARNING OPPORTUNITY

A Step By Step Guide On How One Professional Would Build A Competitive Intelligence Capability From Scratch In A Professional Services Firm.

How would Ragna Bell, Strategic Market Intelligence Leader, EY Knowledge build a competitive intelligence capability in a professional services firm from scratch? Where would she begin? How would she identify and develop a team? What resources would she need today, tomorrow and in the future? How would she integrate the team within the structure of the firm? How would she measure success?



Ragna Bell
Strategic Market Intelligence Leader
EY Knowledge
Ernst & Young LLP



In Conversation With:
Jasmine Trillos-Decarie
Director of Marketing
Foley Hoag

10:15AM Break

10:45AM IF GOOGLE RAN A LAW FIRM: WHAT CAN A \$50BN TECH COMPANY TEACH THE LEGAL INDUSTRY ABOUT MANAGING TALENT AND ACHIEVEMENT?

Google is a unique company that has often stated that their number one focus is to provide the “best user experience possible” that will “ultimately serve (the user), rather than our own internal goal or bottom line.” Imagine if this philosophy was used in operating your law firm? Since 1999, Google has used “Objectives and Key Results” (OKRs) as a transparent way to set ambitious goals and to measure how much an employee has achieved. This philosophy has helped support record profit and employee retention while creating one of the largest companies in the world in a fraction of the time many law firms have existed. What would a Google run law firm look like from a human capital perspective and how would that create the ultimately competitive advantage?



Rick Klau (Invited)
Partner
Google Ventures

11:30AM HOW TO DEVELOP A HIGH PERFORMING SALES CULTURE INSIDE A LAW FIRM STRUCTURE: KEY INSIGHTS ON HIRING, DEPLOYING AND MANAGING AN IN-HOUSE SALES TEAM THAT SUPPORTS YOUR GROWTH OBJECTIVES

Like every other industry, business development is the lifeblood of the law firm. Law Firms have often shied away from the formalized deployment of inside sales for a myriad of reasons but in today’s environment, the conventional wisdom is beginning to shift. The solicitation of legal services requires a unique discipline and skill set, to say nothing of a firm culture that supports this channel of business development. How does one of the largest law firms in the world develop a sales culture and an infrastructure specifically designed to support this relatively new legal function and what does it mean for how your firm will continue to compete for new business in the years ahead?



Greg Fleischmann
Director of Global Marketing
Baker & McKenzie

12:15PM Lunch

1:15PM NAVIGATING CHANGE IN THE FACE OF VOLATILITY AND UNCERTAINTY

Perhaps no two sectors have experienced greater change and volatility than financial services and life sciences industries. Change and talent management strategies are often difficult to develop and execute in stable environments, so how does one help drive the strategic objectives of their company in the face of an abundance of uncertainty? Drawing on her experience managing change while at Wells Fargo and Merck, Lara Nichols will provide real world strategies on how today’s law firm executives can not only navigate strong headwinds, but use highly effective change and talent management strategies to take advantage of major industry paradigm shifts to support the overall growth objective.



Lara Nichols
Global Business and Technology Executive
Former AVP, Global Supplier Management at Merck

MAIN CONFERENCE AGENDA

2:00PM Break

2:30PM **HOW TO CREATE AND RETAIN A CROSS-GENERATIONAL LAW FIRM TEAM TO MAINTAIN THE COMPETITIVE ADVANTAGE**

The face of the workforce is changing. Members of Generation X and Y are entering the workforce with increasingly advanced technology skills, new ways of communicating and with a different set of values and expectations that differ from older generations. This change will create new opportunities and challenges for how talent is managed within today's firm as leaders will be tasked with ensuring a seamless integration of personalities and working styles. Some of the most pressing questions include:

- What are the most effective tools for recruiting new talent?
- What motivates a "millennial" and how is that different from what motivates Gen X and Y?
- To stay competitive, what must a law firm do to attract and retain talent while ensuring the existing workforce can effectively work with different personalities, styles and values?



Rebecca Crotts
Senior Director
Global Talent Management and Development
eBay, Inc

3:00PM **ELO: EXPERIENTIAL LEARNING OPPORTUNITY**

A Step By Step Guide On How One Professional Would Build A Talent Management, Learning and Onboarding Capability From Scratch In A Professional Services Firm.

How would Rebecca Crotts, Senior Director, Global Talent Management and Development, eBay, build a high performing recruitment and retention capability in a professional services firm from scratch? Where would she begin? How would she manage this change from within? How would she present the strategy to the executive committee? What metrics would she use to measure success?



Rebecca Crotts
Senior Director
Global Talent Management and Development
eBay, Inc



In Conversation With:
Jennifer Manton
Chief Marketing Officer
Loeb & Loeb

3:30PM **5 ON 5: A MUTUAL INTERVIEW- STRATEGY, OPERATIONS, MARKETING & LEADERSHIP - EFFECTING CHANGE IN THE UNIQUE CONFINES OF A LAW FIRM ENVIRONMENT**

In this session, each participant will interview the other by asking 5 thought provoking questions. Audience participation at the conclusion of the interview will be strongly encouraged.



Kristan Morrell
Chief Operating Officer
Dickstein Shapiro LLP



Wendy L. Bernero
Chief of Strategic Initiatives
Proskauer

4:15PM **LEADERSHIP: THE BIGGEST RISK TO LAW FIRM SURVIVAL?**

Ask today's law firm executives what the greatest risk to a law firm's survival is, and many will respond, "leadership". Faced with pressures never before realized, today's law firms are managing an onslaught of change both inside and outside the firm. From a deafening demand for lower fees from their clients, requests for alternative billing practices and greater transparency to the economics of services, through the challenges of identifying, recruiting and retaining multi-generational talent, the future leaders of today's law firm will require a skill set and capacity equal to, if not greater than their Fortune 500 counterparts. Leadership development programs at law firms lag measurably behind their corporate counterparts yet the challenges do not.

How can today's firm recognize this challenge and prepare immediately to ensure survival, yet alone growth in the years ahead?



Joseph M. Leccese
Chairman of the Firm
Proskauer



Harry Trueheart
Chairman Emeritus
Nixon Peabody



Angela B. Styles
Partner
Co-Chair, Government
Contracts Group
Executive Committee Member
Crowell & Moring



In Conversation With:
Anthony Paonita
Editor in Chief
Corporate Counsel

5:15PM Conference Concludes

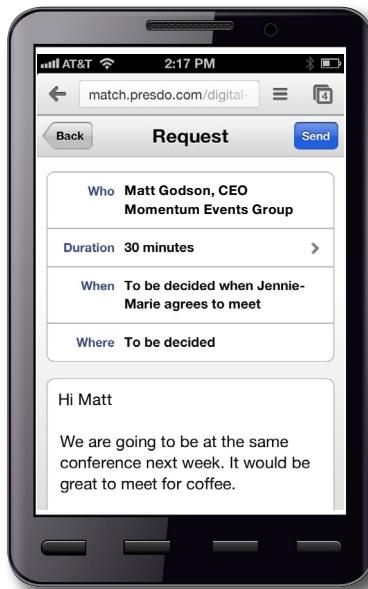
ADDITIONAL EVENT INFORMATION

Now, when you visit www.momentumevents.com on your iPhone, Android, Blackberry or other smartphone you'll receive specially designed and displayed mobile content and navigation which makes accessing your event on-the-go a breeze.

You can...

- Review the agenda for any event
- View the speaker profiles and connect via LinkedIn or Momentum Connect
- Connect with fellow registered attendees through **Momentum Connect Mobile Edition™**
- Send messages to fellow attendees and speakers
- Arrange "at conference" meetings and appointments with fellow attendees prior to the event.
- Obtain a GPS enabled map and directions to the event
- Contact the event hotel directly
- Register for an event
- Modify or cancel a registration
- View our latest videos and tweets ..and more.

Visit us on your smartphone today and join the conversation.



TEAM BUILDING OPPORTUNITIES

We understand that there is just too much information provided at our events for just one person to capture it all.

Even more importantly, as Momentum remains conscious of the budget challenges that most businesses still face in today's economy, we believe that it doesn't take 3 or more to be a group—bring just one colleague along with you to an event and you'll both receive a discount.

Bring one colleague (group of 2 in total)

Both receive 10% off registration.

Bring two colleagues (group of 3 in total)

All three receive 15% off registration.

Bring three colleagues or more (group of 4 in total)

All four receive 25% off registration.

THE FUTURE OF THOUGHT LEADERSHIP DELIVERED TODAY

As competition has significantly increased, resources have been curtailed and the overall economics of the industry have shifted, the race to, and critical importance of, establishing your organization as true subject matter experts with unique abilities and specialized access to methodologies and strategies has never been more important.

As the field gets perpetually more crowded, how can today's smart company rise above the background noise to ensure that the right people hear your message in the intended capacity?

The answer is Momentum's thought leadership solutions.

Developed with one goal in mind, yours, Momentum's portfolio of leading business development services can provide your organization with multiple opportunities to achieve your strategic objectives. By choosing Momentum, your organization will:

- Engage with attendees before, during and after the event to support the development or maintenance of stronger, more valuable relationships.
- Research the event's attendees in tremendous depth before the conference ever begins so you can more effectively prospect and execute a successful on-site strategy.
- Incorporate your thought leadership across several live and traditional channels that provide maximum exposure and awareness to the people that mean most to you.
- Benefit from a custom build database of prospects, a private LinkedIn group and even a bespoke, invitation-only meeting crafted to increase your business development opportunities.

Let Momentum design the right thought leadership solution that supports your strategic objectives and doesn't break your budget because as the only customer service organization within the events industry, our passion lies with driving value for all our clients and making the conference experience enjoyable again.

To learn more, contact:

Ben Greenzweig, Principal, Co-CEO
Momentum Event Group
ben@momentumevents.com
646.504.8089



REGISTRATION INFORMATION

Register online at www.momentumevents.com/FirmThink, email info@momentumevents.com or call +1 646.807.8555.

GROUP BOOKINGS

Group discounts are available for 2 or more attendees. Register 2 or more attendees and receive a 10% discount on all bookings. Register 3 or more attendees for bigger savings. This discount may not be combined with any other offer. All attendees must be employed by the same organization and must register together in one transaction. One invoice will be issued to the group lead.

REGISTER BEFORE 2/28/2014	REGISTER BEFORE 4/30/2014	REGISTER ON OR AFTER 4/30/2014
\$995	\$1195	\$1495

TERMS AND CONDITIONS

- Registration fees may not be shared among people from the same firm or company.
 - Payment must be received in full by the conference date.
 - Any early registration or other discounts cannot be combined and must be applied at the time of registration.
 - Group discounts are available to individuals employed by the same organization.
- If you are unable to attend the conference, you may designate a substitute. Substitution, cancellation and refund requests must be made via e-mail to info@momentumevents.com in accordance with the information found online at: <http://momentumevents.com/attendee-information>. There are no refunds for no-shows.

PHOTOS AND VIDEO

Event registration implies your consent that any pictures and/or video obtained during the event may be used for future promotional purposes. Momentum is able to use your likeness without remuneration.

BOOKING FORM

For faster and more accurate service, please register online at www.momentumevents.com/FirmThink. Online registrants may pay by credit card, wire transfer, check or request an invoice.

You may also use this form and mail it with payment to: **MOMENTUM EVENT GROUP** Suite 100, 50 Dimond Avenue, Cortlandt Manor, NY 10567, USA

YES, PLEASE REGISTER THE FOLLOWING ATTENDEES FOR FIRMTHINK 2020

CONTACT DETAILS

Name _____ Position _____
Approving Manager _____ Position _____
Organization _____
Address _____
City _____ State _____ ZIP Code _____ Phone _____
Fax _____ E-mail _____ Type of Business _____

PLEASE CHARGE MY: VISA MASTERCARD AMEX DISCOVER PLEASE INVOICE ME

Card Number _____

Exp. Date _____ Signature _____

FOR CREDIT CARD AUTHORIZATION

I HAVE ENCLOSED MY CHECK FOR \$ _____ MADE PAYABLE TO MOMENTUM EVENT GROUP.

ACH PAYMENT

PLEASE QUOTE THE NAME OF THE ATTENDEE(S) AND THE EVENT CODE 152W14-NYC AS A REFERENCE.

Please e-mail info@momentumevents.com to receive Wire Transfer and ACH details.

W9: If you require a W9, please download it directly from www.momentumevents.com/w9



To register visit us online at www.momentumevents.com/FirmThink