

Thomson Reuters LEGAL EXECUTIVE INSTITUTE presents

# 19th Annual LAW FIRM LEADERS FORUM

NOVEMBER 6-7, 2014  
WESTIN TIMES SQUARE  
New York, NY  
Cost - \$2,295

*The Changing Model: How the Radical Changes in Legal Service Are Reshaping Law Firm Organization & Practices*



## CO-CHAIRS



**Ralph Baxter**, Chairman Emeritus, Orrick, Herrington & Sutcliffe LLP



**Bradford W. Hildebrandt**, Chairman, Hildebrandt Consulting LLC

## KEYNOTE SPEAKER



**John Dickerson**, Political Director, CBS News & Chief Political Correspondent, Slate Magazine

## AN EVENT DESIGNED FOR LAW FIRM LEADERS

### SPECIAL OFFERS

#### Individual

Register for this event and **SAVE 15%**. Use promo code **LAWFL15** at checkout.

#### Group Discounts

Purchase 2 registrations and get **1 FREE!**

Call 1-800-308-1700 for more details.

#### Combination Special

**Save up to \$600** when registering for both the 19th Annual Law Firm Leaders Forum and the Pre-Conference Workshop on Enhancing Practice Group Performance and Profitability!

*offers expire 8/15/14*

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## Thomson Reuters LEGAL EXECUTIVE INSTITUTE

Dear Colleague:

In the past few years, we have all felt the impact as the legal industry experienced the greatest change since the beginning our careers, and arguably in the history of the profession.

It is during these moments that leaders embrace change and build new roads of opportunity for the firm. And the leaders who do this well, also do it without losing site of the firm's core values, even during periods of uncertain change. With this idea in mind, it is our pleasure to present the 19th Annual Law Firm Leaders Forum, taking place November 6-7 at the Westin New York at Times Square.

The legacy of the Forum is providing one of the most valuable events in the country where Managing Partners, Chairs, and other leaders from firms come together to share their ideas on the most current topics impacting the industry. This year features discussions on the changing nature of the legal process, the emerging role of technology in law firm governance, the changing model for education, training and career opportunities for lawyers, two comprehensive discussions around law firm mergers and dissolutions, and more.

Just two days after the 2014 US midterm elections, we will also have a keynote presentation from John Dickerson, Political Director, CBS News and Chief Political Correspondent, Slate Magazine. Mr. Dickerson is a nationally recognized American journalist who previously covered politics at TIME magazine, including four years as White House correspondent during the presidency of George W. Bush. He is the author of *On Her Trail*, a book about his mother, the late Nancy Dickerson, and is a regular guest on PBS's *Washington Week*, NPR's *The Diane Rehm Show* and the *Charlie Rose* show. Mr. Dickerson will focus on the impact of the midterm elections for Capitol Hill and beyond.

Each year this conference offers an unrivaled exchange of ideas and collaboration with fellow industry leaders. We are very excited about this year's program, and hope to see you this November in New York.

Warm regards,



**Ralph Baxter**  
Chairman Emeritus, Orrick, Herrington & Sutcliffe LLP  
Law Firm Leaders Forum Co-Chair



**Bradford W. Hildebrandt**  
Chairman, Hildebrandt Consulting  
Law Firm Leaders Forum Co-Chair



THOMSON REUTERS™

# 19th Annual LAW FIRM LEADERS FORUM

## *The Changing Model: How the Radical Changes in Legal Service Are Reshaping Law Firm Organization & Practices*

Thomson Reuters Legal Executive Institute is proud to present the 19th Annual Law Firm Leaders Forum and Pre-Conference Workshop this November in New York. The pioneering industry event for law firm leaders, the Forum continues to provide critical insight into current and forthcoming issues affecting the legal profession. Seating is limited. Register now and secure our early bird offer.

This year's program focuses on radical changes impacting legal services. Concerned with the presence of new technologies and competitors in the global market, our program will introduce key players and evolving processes that purport to reshape law firm organizations and practices. Plan to join us and gain crucial takeaways on the changing law firm model.

### Forum topics to be covered this year include:

- The present and future health of "big" law
- The changing nature of the legal process
- The emerging role of technology in the law firm model
- The changing model for education, training and career opportunities for lawyers
- Law firm dissolutions: Why they occur and how they can be prevented
- Law firm mergers: What law firm leaders should know

### Who Should Attend from a Law Firm?

- Chairs
- Managing Partners
- Executive Directors
- CEOs
- Members of management or executive committees, and others holding key management or leadership responsibilities in law firms of all sizes.

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**"The topics of discussion were relevant. We heard from some very key industry people who provided their unique perspective."**

- 2013 Attendee

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## EVENT CO-CHAIRS



### **Ralph Baxter**

Chairman Emeritus, Orrick, Herrington & Sutcliffe LLP

Ralph Baxter served as Chairman and Chief Executive Officer of Orrick from 1990 through March 2013. Under Mr. Baxter's leadership, Orrick expanded, diversified and extended its geographic reach, transforming from a domestic firm with California origins to its position today as one of the world's most prominent global law firms, with more than 1,100 lawyers in 25 offices across the United States, Europe and Asia. Mr. Baxter also launched several transformative initiatives that more closely align Orrick with its clients, including non-traditional talent and pricing models, distinguishing the firm as a bold innovator in the legal industry.

In naming Mr. Baxter among the "Most Innovative Managing Partners" for the second year in a row in 2012, Law360's editors noted that Mr. Baxter "has left an indelible mark not only on [Orrick]... but also the larger practice by upending traditional career models, rejiggering payment structures and transforming the business of law in many other innovative ways." Mr. Baxter led Orrick in establishing the first global insourcing center among law firms – Orrick's Global Operations Center in Wheeling, West Virginia – which marked its 11th anniversary in 2013. Originally home to the firm's administrative support functions, the GOC today has a large staff of career associates and other legal professionals and has brought 350 jobs to the city.



### **Bradford W. Hildebrandt**

Chairman, Hildebrandt Consulting LLC

Brad Hildebrandt formed Hildebrandt, Inc. in 1978 to provide a broad range of management and consulting advice to law firms, law departments and government agencies. Now known as Hildebrandt Consulting LLC, the company provides strategic consulting services specializing in strategic advice and implementation, research, mergers and acquisitions and special situations. Our worldwide knowledge of the profession is unparalleled. We serve clients in North and South America, Europe, Asia and Australia.

Brad Hildebrandt's extensive knowledge of the legal industry and unique understanding of how professional services firms work make him the leading global authority on law firm management, economics and mergers.

He has played an active role in most of the major law firm mergers in the United States, Canada, Europe and Asia and also serves as a confidential, long-term advisor to a number of large law firms.

## KEYNOTE SPEAKERS

**John Dickerson**, Political Director, CBS News & Chief Political Correspondent, Slate Magazine

**David B. Wilkins**, Lester Kissel Professor of Law; Director, Program on the Legal Profession; Vice Dean for Global Initiative on the Legal Profession, Harvard Law School

## FACULTY

**Nicholas Bagiatis**, Chief of Business & Regulatory Department Operations, Reed Smith LLP

**Raymond E. Bayley**, Chief Executive Officer, Novus Law, LLC

**Owen Byrd**, Chief Evangelist and General Counsel, Lex Machina

**Jerry K. Clements**, Chair, Locke Lord LLP

**Ron A. Dolin**, Research Fellow, Stanford Law School; Co-Leader of Program on Legal Innovation, an interdisciplinary program with the Stanford School of Design

**Scott Ferraiola**, General Counsel, IBM Watson

**David Gaulin**, Partner, Co-Chair Law Firm Services, National Group Leader, PricewaterhouseCoopers LLP

**Richard R. Hays**, Chairman & Managing Partner, Alston & Bird LLP

**Andrew G. Humphrey**, Managing Partner, Faegre Baker Daniels LLP

**Gregory B. Jordan**, General Counsel & Head of Regulatory and Government Affairs, PNC Financial Services Group Inc.

**Daniel Martin Katz**, Associate Professor of Law, Michigan State University

**Daniel Lewis**, Chief Executive Officer and Co-Founder, Ravel Law

**James J. Maiwurm**, Chair & Global Chief Executive Officer, Squire Patton Boggs

**Justin McCarthy**, Senior Vice President & Associate General Counsel, Pfizer, Inc.

**Roger Meltzer**, Co-Chairman, Americas & Partner, DLA Piper

**Alan C. Michaels**, Dean and Edwin M. Cooperman Professor of Law, The Ohio State University Moritz College of Law

**Michael Mills**, President & Chief Strategy Officer, Neota Logic

**Edward P. O'Keefe**, Legal Chief Operating Officer & Deputy General Counsel, Technology, Bank of America Corporation

**William J. Perlstein**, Partner & Former Co-Managing Partner, Wilmer Cutler Pickering Hale and Dorr LLP

**Regina M. Pisa**, Chairman, Goodwin Procter LLP

**J. Stephen Poor**, Chairman, Seyfarth Shaw LLP

**Aric Press**, Senior Vice President & Editor in Chief, ALM Media Properties, LLC

**Lisa Hart Shepherd**, Chief Executive Officer, Acritas

**Andy Sullivan**, Correspondent & Lead Reporter, Money & Politics, Reuters

**William M. Treanor**, Executive Vice President & Dean of the Law Center; Professor of Law, Georgetown University Law Center

**Maurice A. Watson**, Chairman, Husch Blackwell LLP

# PROGRAM AGENDA

THURSDAY NOVEMBER 6

8:00am - 8:45am

Registration and Breakfast

Hosted by  LAWYERS  
TRAVEL

8:45am - 9:00am

Welcome and Opening Remarks

Co-Chairs:

**Ralph Baxter**, Chairman Emeritus, Orrick, Herrington & Sutcliffe LLP  
**Bradford W. Hildebrandt**, Chairman, Hildebrandt Consulting LLC

9:00am - 10:30am

The Present and Future Health of the Large Law Firm Model

The changes underway in the legal marketplace, accelerated by the Great Recession, have already had an impact on the economic performance of large law firms. Are the best days of large law firms behind them? Or are large law firms resilient and agile enough to adapt and continue to flourish? This panel will examine the current state of large law firms, discuss how the dynamics of change are playing out, and forecast what lies ahead.

Moderator:

**Bradford W. Hildebrandt**, Chairman, Hildebrandt Consulting LLC

Panelist:

**Gregory B. Jordan**, General Counsel & Head of Regulatory and Government Affairs, PNC Financial Services Group Inc.

**Aric Press**, Senior Vice President & Editor in Chief, ALM Media Properties, LLC

**Maurice A. Watson**, Chairman, Husch Blackwell LLP

10:30am - 11:00am

Break Hosted by



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11:00am - 12:30pm

The Changing Nature of the Legal Process

The dynamics of the 21st century legal marketplace require and enable legal service to be delivered by different methods and personnel, reducing cost, improving quality, and producing greater job satisfaction among the professionals. This panel will discuss what has happened thus far and what lies ahead in the evolution of legal process design and execution.

Moderator:

**Ralph Baxter**, Chairman Emeritus, Orrick, Herrington & Sutcliffe LLP

Panelists:

**Nicholas Bagiatis**, Chief of Business & Regulatory Department Operations, Reed Smith LLP

**Raymond E. Bayley**, Chief Executive Officer, Novus Law, LLC

**Daniel Lewis**, Chief Executive Officer and Co-Founder, Ravel Law

**Edward P. O'Keefe**, Legal Chief Operating Officer & Deputy General Counsel, Technology, Bank of America Corporation

**J. Stephen Poor**, Chairman, Seyfarth Shaw LLP

12:30pm - 2:00pm

Keynote Luncheon

The US midterm elections on November 4 will put into play all 435 seats in the United States House of Representatives and 33 of the 100 seats in the United State Senate. In addition, 38 state and territorial governorships and 46 state legislatures are also on the docket, causing many political observers to view this year's election as a referendum on the actions—or lack thereof—of incumbent Democrats and Republicans. Regardless of outcome, the impact of this election will be a critical factor in President Obama's final two years in office. Join us as our distinguished speakers ponder the repercussions of the election results for Capitol Hill and beyond.

Moderator:

**Andy Sullivan**, Correspondent & Lead Reporter, Money & Politics Team, Reuters

Presenter:

**John Dickerson**, Political Director, CBS News & Chief Political Correspondent, Slate Magazine

2:00pm - 3:30pm

The Emerging Role of Technology in the Law Firm Model

Technology will drive many of the most important advances in the delivery of legal service. We are at a relatively early stage of this development both because the technology is just ramping up for the legal service market and because lawyers and firms have been relatively slow to adopt new practices. This panel will explore the effects technology has already had on law practice and, more importantly, its potential for enabling further change in the future.

Moderator:

**Ralph Baxter**, Chairman Emeritus, Orrick, Herrington & Sutcliffe LLP

Panelists:

**Owen Byrd**, Chief Evangelist and General Counsel, Lex Machina  
**Ron A. Dolin**, Research Fellow, Stanford Law School; Co-Leader of Program on Legal Innovation, an interdisciplinary program with the Stanford School of Design

**Scott Ferraiola**, General Counsel, IBM Watson

**Daniel Martin Katz**, Associate Professor of Law, Michigan State University

**Michael Mills**, President & Chief Strategy Officer, Neota Logic

3:30pm - 4:00pm

Break Hosted by



4:00pm - 5:30pm

The Changing Model for Education, Training and Career Opportunities for Lawyers

The changes underway in the practice of law have profound implications for the career paths of lawyers, commencing with the way they are educated, the way they are trained, the nature of their work, and the characteristics of their career expectations. Lawyers are expected to think and operate in a far more nuanced and comprehensive capacity than ever before, a fact which calls into question the traditional model of career development championed by academic and professional institutions. This panel examines the desirable and likely changes to lawyer training and professional growth as foretold by prominent law school deans and distinguished law firm chairs from across the country.

Moderator:

**Ralph Baxter**, Chairman Emeritus, Orrick, Herrington & Sutcliffe LLP

Panelists:

**Richard R. Hays**, Chairman & Managing Partner, Alston & Bird LLP

**Alan C. Michaels**, Dean and Edwin M. Cooperman Professor of Law, The Ohio State University Moritz College of Law

**Regina M. Pisa**, Chairman, Goodwin Procter LLP

**William M. Treanor**, Executive Vice President & Dean of the Law Center; Professor of Law, Georgetown University Law Center

5:30pm - 7:00pm

Cocktail Reception



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# PROGRAM AGENDA

FRIDAY, NOVEMBER 7

**8:00am Breakfast**

**8:30am - 9:30am**

**Executive Breakfast Workshop**

Hosted by

Acritas  
ANALYSIS. INSIGHT.

## Critical Strategies for Developing International Opportunities

Drawing on interviews with over 12,000 senior general counsel worldwide, this workshop will reveal where the greatest international opportunities lie for legal service providers. Attendees will receive practical advice on developing a successful strategy to capture one's share of lucrative international workflows vis-a-vis exclusive data and analysis from Sharplegal, Acritas' annual survey of the global legal market. Join this session and take a deep dive into how the needs of in-house counsel differ across markets, what clients mean by value in today's economy, and what they look for when selecting firms for international work. Participants will hear from a firm that has successfully used an international strategy to drive revenues and profitability, and a leading GC who will share experiences of best and worst practice in delivering to global clients.

### Moderator:

**Lisa Hart Shepherd**, Chief Executive Officer, Acritas

### Presenter:

**Justin McCarthy**, Senior Vice President & Associate General Counsel, Pfizer, Inc

**Roger Meltzer**, Co-Chairman, Americas & Partner, DLA Piper

**9:30am - 11:00am**

## Law Firm Dissolutions: Why They Occur and How They Can Be Prevented

With all of the pressures law firms face in the 21st century, we will continue to see some number of firms fail. This session will be based on a case study prepared by the Harvard Law School on the dissolution of the Howrey firm, led by Professor David Wilkins, and will give participants an opportunity for a highly interactive examination of the causes of law firm failures and the steps that might be taken to achieve more positive outcomes.

### Leader:

**David B. Wilkins**, Lester Kissel Professor of Law; Director, Program on the Legal Profession; Vice Dean for Global Initiative on the Legal Profession, Harvard Law School

**11:00am - 11:30am Break**

**11:30am - 1:00pm**

## Law Firm Mergers: What Law Firm Leaders Should Know

The incidence of law firm mergers has increased significantly in recent years. This session will explore why firms are considering merger, what factors contribute to successful and unsuccessful merger negotiations, and how firms should approach the prospect of merger as a tactic in their overall strategic plans.

### Moderator:

**Bradford W. Hildebrandt**, Chairman, Hildebrandt Consulting LLC

### Panelists:

**Jerry K. Clements**, Chair, Locke Lord LLP

**David Gaulin**, Partner, Co-Chair Law Firm Services, National Group Leader, PricewaterhouseCoopers LLP

**Andrew G. Humphrey**, Managing Partner, Faegre Baker Daniels LLP

**James J. Maiwurm**, Chair & Global Chief Executive Officer, Squire Patton Boggs LLP

**Roger Meltzer**, Co-Chairman, Americas & Partner, DLA Piper

**William J. Perlstein**, Partner & Former Co-Managing Partner, Wilmer Cutler Pickering Hale and Dorr LLP

**1:00pm Closing Remarks**

**"The entire program was top notch. Especially insightful for me was the overall confirmation that mid sized firms such as mine are at an advantage in the current environment. Ralph Baxter adds great insight. The candid discussion from in-house counsel is something you don't hear at every conference."**

- 2013 Attendee

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# Enhancing Practice Group Performance & Profitability

Well-led and managed practice groups are key to gaining competitive advantage in today's legal market. There is little margin for error in the race to improve firm profitability and sustain profits per partner. The critical elements of practice group effectiveness are: 1) creating a structure that fosters high-level practice group performance and 2) targeting market and client opportunities that will maximize profitability and market position.

This pre-conference workshop program will help firms understand the right practice structure to achieve its strategic goals and effectively align its management and financial systems. Through participation in an interactive case study, it also will provide the skills and tools needed to help a practice group identify and pursue the best opportunities for profitable growth.

## WORKSHOP HIGHLIGHTS

- Optimal Practice Structure
- Revenue Generation Model
- How to Empower Practice Leaders
- Using Financial Metrics and Market Intelligence
- Building Partner Consensus

## Pre-Conference Agenda

9:00am - 9:30am	Registration & Continental Breakfast
9:30am - 10:30am	What Shape is Your Firm? The Fundamentals of Law Firm Organizational Structure and Its Impact on Performance
10:30am - 10:45am	Break
10:45am - 11:30am	Leading and Managing in a Mixed-Matrix Environment
11:30am - 2:00pm	Working Lunch
	The Revenue Generation Model: Developing and Delivering High-Value Services That Maximize Profitable Revenue Growth
2:00pm - 3:15pm	Case Study Breakout Group Discussion – Analysis of Practice Group Opportunities
3:15pm - 3:30pm	Break
3:30pm - 4:30pm	Reports by Group/Comments by Panel of Managing Partners and Practice Group Leaders
4:30pm - 5:00pm	Wrap Up Discussion

## CO-CHAIRS

**Wendy Bernero**, Chief of Strategic Initiatives, Proskauer Rose LLP

**Susan Raridon Lambreth**, Principal, LawVision Group

## FACULTY

**Tami Lyn Azorsky**, Partner, McKenna Long & Aldridge LLP

**Elise M. Bloom**, Partner and Member of Executive Committee, Proskauer Rose LLP

**John P. Langan**, Managing Partner, Hiscock & Barclay, LLP

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