



# The CSO Boardroom

## Overview

The CSO Boardroom is designed to provide senior level law firm and professional services firm executives a forum for energetic and strategic discussion. All discussions are Boardroom confidential. The Boardroom summits will include discussions about these and other relevant topics:

- The evolving role of CSOs, CMOs who oversee sales, and Sales Leaders—the new faces of influence
- Building and running a sales team
- Recognizing sales success—“achiever’s club” for lawyers?
- Post-COVID selling in a virtual business world
- Corporate C-level executive; in house counsel, and/or partner presentation or Q&A
- Your professional development—what’s nice to know and what’s need to know?
- Trends in firms that impact the C-level business development/sales professional
- Obstacles and challenges in establishing best practices models at law firms
- Leadership attributes and models required to achieve planning and implementation success
- The ever-growing role of COOs in the BD world—collaborative opportunities
- Critical elements for establishing key client teams (strategic account teams) and best practices for implementation success
- The role service initiatives play in strategic account management (“SAM”)
- Dashboards and metrics
- The latest sales and technology “innovations” in the marketing and business development departments
- Revenue forecasting in professional service firms
- Succession planning for key client team leaders and team members
- The role of firm leadership with respect to sales initiatives
- Financial structures when planning for and assessing ROI
- New service “product” development and how R&D can play a role in professional service firms
- Compensation systems that work for partners, SAM teams, and sales/business development professionals
- Process improvement and its new integration into the business of law firms
- The intersection of professional development; business development; finance and operations and the many challenges of creating team
- The role of technology in SAM
- Go-to-market partner strategies with external resources for driving revenue
- Diversity and Inclusion—revenue growth opportunities
- Strategic Account Management—Trends in SAM, Pipeline Reporting and Hiring SAM Managers/Directors

## 2023 Boardroom Offerings

- ✓ One and one-half-day in person facilitated roundtable discussions around April/May and September/October timeframes annually
- ✓ Two one-hour virtual meetings—dates to be agreed upon by group
- ✓ Strong peer-to-peer networking group
- ✓ LSSO Membership for one year
- ✓ 15% discount to LSSO RainDance Annual Sales Conference--June each year
- ✓ 10% discount to annual Thomson Reuters Legal Executive Institute [Marketing Partner Forum](#), January 24, 2024, Amelia Island, FL



Creating Competitive Advantage

### Meeting Format

All meetings will be designed to include facilitated conversations based on topics identified in pre-meeting interviews to be conducted by phone. The in-person meetings will include a professional development segment to be presented by a well-known authority in the field of sales, service or sales management with an expertise in the professional services field. Time will be built in for three roundtable breakouts on issues identified to be of specific interest by Boardroom members. Two plenary sessions will focus on topics of specific interest to the group.

### Membership Fee

U.S. \$3,950.00 (+\$500 per each additional firm member)  
Please see accompanying CSO Boardroom Packaged Offerings as well.

### Leader Member Profiles

Chief Sales Officers  
Chief Marketing Officers with Sales Responsibility  
Service Excellence Team Leaders

Chief Business Development Officers  
Strategic Account Leaders  
Chief Client Service Leaders

### Boardroom Facilitators

Silvia L. Coulter, Principal  
James A Cranston, Principal  
Steven Bell, Senior Senior Consultant

### 2023 Boardroom Dates and Locations

March, 2023, hosted by Silvia Coulter and Jim Cranston, Boston, MA location tba  
June, 2023, Virtual  
September/October, 2023, in person host firm TBD  
December, 2023 Virtual

### To Sign Up

Please sign a copy of the CSO Boardroom Membership Application (attached) and send to:

LawVision Group  
P.O. Box 1572  
Manchester, MA 01944  
[scoulter@lawvision.com](mailto:scoulter@lawvision.com)

### For More Information

Silvia L. Coulter, 617-697-4869 or [scoulter@lawvision.com](mailto:scoulter@lawvision.com)  
Jim Cranston, 949-306-3259 or [jcranston@lawvision.com](mailto:jcranston@lawvision.com)  
Steve Bell, 202-421-5988 or [sbell@lawvision.com](mailto:sbell@lawvision.com)

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## FIRM MEMBERSHIP APPLICATION

### Membership Entitles Your Firm to:

- Send up to 2 representatives to each meeting (second representative will be \$500/annual fee)
- Attend up to 2 virtual and 2 in person meetings per billing cycle
- Receive program materials distributed at meetings and Boardroom meeting notes after meetings
- Yearly membership with LSS0 ([www.legalsales.org](http://www.legalsales.org))
- 10% discount to Marketing Partner Forum (January each year)
- 10% discount to RainDance Annual Sales Conferences (June each year)

### FIRM INFORMATION

<b>Firm Name:</b>	
<b>Billing Address:</b>	
<b>City, State Zip:</b>	

### PRIMARY CONTACT *(this contact will be recognized as the billing contact)*

<b>First Name:</b>	<b>Middle Initial:</b>
<b>Last Name:</b>	<b>Preferred Name:</b>
<b>Title:</b>	
<b>Telephone:</b>	<b>Email:</b>
<b>Office Address:</b>	
<b>City, State Zip:</b>	
<b>Assistant Name:</b>	
<b>Telephone:</b>	<b>Email:</b>

Firm membership allows for up to two permanent representatives to be included on all Boardroom details and meeting invitations. If you would like your firm to have two representatives as individual members, please list second member information below. **Second member should be a peer-level or senior direct report to the senior member. An additional charge of \$250 will be invoiced for a second member per meeting.**

**SECONDARY ROUNDTABLE CONTACT (Optional)**

<b>First Name:</b>		<b>Middle Initial:</b>	
<b>Last Name:</b>		<b>Preferred Name:</b>	
<b>Title:</b>			
<b>Telephone:</b>		<b>Email:</b>	
<b>Office Address:</b>			
<b>City, State Zip</b>			
<b>Assistant Name:</b>			
<b>Telephone:</b>		<b>Email:</b>	

**Billing Information**

- \$3950/year
- Billing cycle: January 1 – December 31
- This is an annual membership. Refunds (full or partial) are not given for missed meetings, please plan to send a delegate (senior most on your team), if you are unable to attend a scheduled meeting
- Membership automatically renews on January 1 unless written notice is received

Note: This is not an invoice; please do not send checks with this document. Once this form is submitted, an invoice will be generated and mailed.

By signing this membership application, you are stating that you authorized to sign on behalf of the firm/organization listed above. Your signature obligates your firm/organization to membership in the CSO Boardroom

**Signature:**

**Date:**

**Please return completed form to:  
 By Mail:**

**By Email: Christine Hicks, Boardroom Administrator  
 chicks@lawvision.com**

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 P.O. Box 1572  
 Manchester By the Sea, MA 01944