



LawVision

CSO/CMO BOARDROOM



OVERVIEW






Designed exclusively for BigLaw marketing and sales leaders, LawVision's Chief Sales Officer/Chief Marketing Officer Boardroom **focuses on the unique challenges and opportunities of having revenue responsibility and managing client-facing direct reports.** The CSO/CMO Boardroom provides these senior executives a forum for energetic and strategic conversation augmented with revenue innovations and strategies presented by industry leaders from professional services firms.

All discussions at the CSO/CMO Boardroom are confidential. The Boardroom is a perfect fit for leaders whose organizations span the spectrum from classic marketing and communications to direct sales.

CSO/CMO BOARDROOM TOPICS

- Clients' perspectives ("Voice of the Client")
- Revenue strategy, sales process, and pipeline management
- Personal sales management skills
- Hiring and managing sales and BD teams, including compensation concepts
- Teamwork between "traditional marketing" and client-facing parts of the team
- Collaboration with other departments
- Account-Based Marketing and Sales
- Revenue-enabling technology including AI
- Data analytics and reporting ROI
- Lawyer training, coaching, and engagement
- Staff development
- Career advancement
- Your network of professional contacts
- Legal-product development
- Managing up

CSO/CMO BOARDROOM EXCLUSIVE MEMBERSHIP PROVIDES:

-  **Fresh Ideas**
Cutting-edge best practices from those on the front lines
-  **Frameworks and Tools**
Learn new ways of thinking and doing to tackle tough problems
-  **Curated Content**
We sort through current content and synthesize the most relevant
-  **Expert Industry Analysis**
Guest speakers and workshops will give you confidence to act
-  **Peer-to-Peer Exchange**
Supportive peer community



TYPICAL TITLES of CSO/CMO BOARDROOM MEMBERS:

- Chief Strategy Officer
- Chief Marketing Officer
- Chief Sales/Business Development Officer
- Chief Client Officer
- Strategic Account/Key Client Leader
- Chief Innovation Officer

2024 BOARDROOM MEETINGS and MEMBER BENEFITS

- Four meetings per year: (two) in-person 1.5-day meetings and (two) 2-hour virtual meetings
- Strong peer-to-peer interactions between meetings
- One-year complimentary membership to the Legal Sales & Service Organization (LSSO—legalsales.org)

BOARDROOM FACILITATORS

Industry pioneers who, as Chief Marketing and Sales Officers at Big Law and Big 4 accounting firms, have managed large departments; built and led sales teams; exceeded personal revenue quotas; and written and presented on the topic of law firm sales around the globe.



Silvia L. Coulter
Co-Founding Principal

scoulter@lawvision.com
617-697-4869



Jim Cranston
Co-Founding Principal

jcranston@lawvision.com
949-306-3259



Steve Bell
Principal

sbell@lawvision.com
202-421-5988



THE CSO/CMO BOARDROOM FIRM MEMBERSHIP APPLICATION

Membership Entitles Your Firm to:

- Attend up to 2 virtual and 2 in person meetings per billing cycle
- Receive program materials distributed at meetings and any Boardroom meeting notes
- One-year complimentary membership with Legal Sales & Service Organization (www.legalsales.org)

FIRM INFORMATION:			
Firm Name:			
Billing Address:			
City, State Zip:			
PRIMARY CONTACT: <i>(this contact will be recognized as the billing contact)</i>			
First Name	Middle Initial	Last Name	Preferred Name
Title:			
Telephone:		Email:	
Office Address:			
City, State Zip:			
ASSISTANT NAME:			
Telephone:		Email:	

BILLING INFORMATION

- \$3,950/year (Once this form is submitted, an invoice will be generated and emailed)
- 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

By signing this membership application, you are stating that you are authorized to sign on behalf of the firm/organization listed above; an invoice will be emailed to you.

Signature:	Date:
------------	-------

PLEASE RETURN COMPLETED FORM:

By MAIL: LawVision Group
P.O. Box 1572
Manchester By the Sea, MA 01944

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