

Business Development Inc., founder of the acclaimed *Marketing Partner Forum*®,
Major, Lindsey & Africa, the world's leading legal recruiting and placement firm, and
Of Counsel magazine, a Wolters Kluwer publication

Present the:

LEGAL SERVICES

*Innovation Forum*TM

Value in Client Service, Delivery & Development

Friday, May 10, 2013 – New York City office of Orrick

9 a.m. **Welcome Remarks** – Mitch Zuklie, Chairman-Elect, **Orrick Herrington & Sutcliffe**

9:10 a.m. **The Innovation Imperative in the Legal Industry - What's Happening, Opportunities, Risks & Rewards** - More law firms and in-house counsel departments are undertaking radical legal service-related innovations, but the majority of lawyers still innovate incrementally, reactively and/or piecemeal. Panelists will discuss the pressures their companies and firms are facing; their innovation philosophy and approach; the role innovation plays at various levels; how innovations involving technology, processes and/or people are identified, vetted, tried and/or implemented; and examples of successes, obstacles and challenges.

MODERATOR: Melanie Bennet, Global Practice Leader - Law Firm Management Practice, **Major Lindsey & Africa**

PANELISTS: Jonathan Brayne, Partner and Head of Firm-Wide Innovation Panel, **Allen & Overy**
Vincent Castiglione, General Counsel, **Coby Electronics Corporation**
Siobhan Handley, Managing Partner for Talent, **Orrick Herrington & Sutcliffe**
Howard Possick, Senior Deputy General Counsel, **TD Ameritrade Holding Corporation**
David Cunningham, Vice President, Assistant General Counsel & Director of Intellectual Property Law, **The Hartford Financial Services Group**

10:30 a.m. Break

10:45 a.m. **Successful Law Firm-Client Innovations** – Real-life innovations will be described and discussed from both the client's and law firm's perspectives. Specific innovations to be discussed include: alternative business structures, beyond alternative fee arrangements, matter management, matter-specific online auction events for legal services, process and partnership improvements, procurement's role in purchasing outside legal services, quality controls, revenue-generating legal departments, sole-sourcing and unbundling litigation.

MODERATOR: Larry Smith, Editor, ***Of Counsel***, Author of: *Inside/Outside: How Businesses Buy Legal Services* and Senior Vice President, **Levick**

PANELISTS: Paul Carr, Chief Operating Officer, **Axiom**
Jared Freedberg, Vice President & Associate General Counsel, Corporate Development, **Covance**
Paul Smith, Partner, **Eversheds** and award-winning innovator for clients **Tyco** and **DuPont**
Julian "Keith" Isgett, Managing Attorney - Global External Legal Relations, **GlaxoSmithKline**
Michael Caplan, Chief Operating Officer, Office of the General Counsel, **Marsh & McLennan Companies, Inc.**
Lisa Damon, Partner and Executive Committee member and Carla Goldstein, Chief Strategic Innovations Officer, **Seyfarth Shaw**

12 noon Buffett Lunch

1 p.m. **Staying Ahead of the Curve in a Brave New Legal World** - Mitchell Kowalski, Author of: *Avoiding Extinction: Reimagining Legal Services for the 21st Century*.

2 p.m. **Successful Legal Services Apps** - A July 2012 ABA survey found that approximately 90% of lawyer respondents use a smartphone in their practice. Of those, approximately 44% (and growing) use the iPhone®. Approximately 33% of respondents reported using a tablet device for law-related tasks (with 91% of those persons using an iPad®). About 30% lawyers using the iPhone® and iPad® report downloading a law-related app (application). Apps are no longer just for research and document creation/management. Innovative law firms have created and launched a range of successful mobile apps designed to support practice-niche areas, case-type, industry specifics, internal communications, matter/case management and for other purposes. Panelists will describe how the idea for their law firm's app originated, which app platform(s) were chosen and why, the app development plan (including challenges/obstacles/hurdles to development), the actual use of the app, results from it, and next steps.

MODERATOR: Julie Savarino, Managing Director, **Business Development Inc.**

PANELISTS: Julie Gurney, Senior Marketing Communications Manager, **Benesch** –
Benesch Opportunity®

Andrew Baker, Director, Legal Technology Innovations Office and Jay Myers, Partner, **Seyfarth Shaw – SeyfarthLink and Trademark Watch Notice**
Kenneth Grady, General Counsel and Secretary, **Wolverine World Wide Inc. – Trademark Watch Notice**
Dave Harvey, Director of Business Development, **Morrison Foerster - MoFo2Go**
Frank Spadafino, Chief Information Officer, **EpsteinBeckerGreen – Wage & Hour**

3 p.m. Break

3:15 p.m. **The Accounting Firm ‘Sales’ Model in Law Firms – What Works, What Doesn’t** – About 20 years ago, a handful of law firms innovated by trying to adopt the accounting firm “sales” model within their law firms. Some law firms asked senior Partners to reduce their billable hours and concentrate on rainmaking. Other law firms hired sales people from outside professions to “sell” for the firm. The majority of these efforts dissipated for various reasons, but in recent years there has been a resurgence. This session will provide a review of the "sales" functions in accounting and law firms; review what features of accounting firm "sales"/client development programs/models/methods are and/or have been used/tried/applied in various law firms; what works; what doesn't; differences/barriers/hurdles; and how clients/prospective clients respond.

MODERATOR: Scott Kessler, Managing Director, Law Firm Management Practice, **Major Lindsey & Africa**
PANELISTS: Jay Marshall, Managing Director and Head of Strategy and Business Development, **AlixPartners**
Todd Throckmorton, Regional Director of Business Development, **BDO, USA**
Mike Duffy, Director of Growth & Client Service, **King & Spalding**
Andrew Murray-Brown, Chief Business Development Officer, **Ropes & Gray**

4:30 – 6 p.m. **Optional Post-Program Reception** – at Orrick’s New York office

Instant audience polling technology to be provided by **Express Interactive**



This Forum is designed specifically for appropriate members of law firms including: Managing Partners, CEOs, COOs, practice group leaders, practice managers, lawyers, Chief, Officers and/or Directors of IT, Strategy, Innovation, Knowledge Management, Marketing and/or Business Development, etc., and also for General Counsel and in-house counsel from corporations and other entities.

Space is limited! To save space(s) and obtain registration information, please email your name, firm and contact information to: Forum@BusDevInc.com.

Registration fees are \$850.00 USD per qualified registrant and include: breakfast, two breaks, lunch, an optional post-program reception on Friday, May 10, 2013 and the program handout. Please note: travel, accommodations and/or other costs are each attendee's own responsibility and are not included in the registration fee. The registration deadline is Friday, April 26, 2013 and walk-ins cannot be accommodated. The registration fee is non-refundable, but appropriately qualified substitutions from the same firm can be made. Audio, video and/or other taping, recording and/or broadcasting during the Forum are prohibited.

For more information, please contact Julie@BusDevInc.com, telephone (734) 668-7008.



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