



Ark Group/Managing Partner's 8th Annual

Knowledge Management in the Legal Profession

Recalibrating for Innovation: KM as an integral part of the standard processes and workflows that run the legal service delivery machine—enabling law firms to deliver unparalleled breakthroughs in agility and efficiency

October 24-25, 2012
AMA Executive Conference Center
New York, NY

As the legal profession bends and begins to adapt to the needs of a new economy, many law firms find themselves in transition—recalibrating for innovation in an effort to ensure that the firm is not merely a survivor, but a leader.

More than ever before, clients are focused on how legal work is going to be done. Law firms need the tools and processes that drive true efficiency in service delivery and this is not a one-dimensional problem as it includes pricing, planning, matter management and reporting—as well as execution of the work itself.

For KM to remain a vital function for firms (as it should) it will need to be focused on solving the core challenges facing firms today—versus the litany of needs described by the past.

Ark Group's 8th annual **Knowledge Management in the Legal Profession** conference will challenge the entrenched orthodoxies—dissecting the standard practices and processes that law firms assume they must do (because this is the way they have always done it)—confronted by rationalized business processes (i.e. the ones that every other industry has adopted).

The challenge ahead of us isn't as much about making the case for KM leadership as it is about finding the right skills to pioneer new initiatives. Some KM practitioners may have these skill sets—and some may not. Regardless, law firm leaders must start re-thinking the "just in case" model of precedent and research collection—and find ways to marshal their resources to provide the necessary infrastructure to make course corrections, change business processes, and improve decision-making frameworks enabling law firms to deliver unparalleled breakthroughs in agility and efficiency.

Lead Sponsors:



Contributing Sponsors:



Featuring Key Contributions From:

Toby Brown, Director of Strategic Pricing & Analytics, **Akin Gump Strauss Hauer & Feld LLP**

Ellen Rosenthal, Chief Counsel, Pfizer Legal Alliance, **Pfizer Inc.**

Risa Schwartz, KM consultant and former Head of Knowledge Management, **Google**

Robert H. Brunson, Partner, **Nelson Mullins Riley & Scarborough LLP**

Jeffrey S. Rovner, Managing Director for Information, **O'Melveny & Myers LLP**

Scott Rechtschaffen, Chief Knowledge Officer, **Littler Mendelson P.C.**

Andrew Baker, Director of Legal Technology Innovations Office, **Seyfarth Shaw LLP**

Kim Craig, Director Legal Project Management Office, **Seyfarth Shaw LLP**

John Alber, Partner, **Bryan Cave LLP**

Oz Benamram, Chief Knowledge Officer, **White & Case LLP**

Corinna Codd, Head Group Legal Strategic Initiatives, **Novartis International AG**

Thomas Kennedy, Partner & Global Head of Knowledge Strategy, **Skadden, Arps, Slate, Meagher & Flom LLP**

Kenneth Bender, Partner, **Paul Hastings LLP**

Gene Berger, Manager of Financial Planning & Analysis, **Dechert LLP**

David B. Hobbie, Litigation Knowledge Manager, **Goodwin Procter LLP**

Andrew Terrett, National Director of Knowledge Management, **Borden Ladner Gervais LLP**

Chad Ergun, Director, Global Practice Services & Business Intelligence, **Gibson, Dunn & Crutcher LLP**

Maura R. Grossman, Counsel, Litigation, **Wachtell, Lipton, Rosen & Katz**

Tom Baldwin, Chief Knowledge Officer, **Reed Smith LLP**

Patrick V. DiDomenico, Director of Knowledge Management, **Ogletree, Deakins, Nash, Smoak & Stewart, P.C.,**

And Many Others!

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DAY ONE—Wednesday, October 24, 2012

8:30AM Sign-In & Networking Breakfast

9:00AM Opening Remarks: Conference Chairperson

Toby Brown, Director of Strategic Pricing & Analytics,
Akin Gump Strauss Hauer & Feld LLP

9:10AM KEYNOTE

The Economics of Law and the Future of KM

All of the change being driven in the legal market comes from shifts in core economic forces. For firms looking to successfully implement change, they should truly understand the deeper, underlying forces driving them. This keynote session will dissect the economics of a law firm and layer in the economics of the New Normal. For legal KM professionals, these issues are especially meaningful. For KM to remain a vital function for firms (as it should) it will need to be focused on solving the core challenges facing firms, versus the litany of needs described by the past. Attend this session to get an economist's view of the market and explore ideas for successfully addressing KM's future challenges.

Toby Brown, Director of Strategic Pricing & Analytics, **Akin Gump Strauss Hauer & Feld LLP**

9:50AM CLIENT PANEL DISCUSSION

Competition, Collaboration and Innovative Service Delivery

Global competition, commoditization, legal outsourcing and pressure from clients to cut costs have created a sense of urgency within law firms to better understand their own business—and more specifically, the business of their clients. More work is done today in-house—if not by a myriad of alternate, outside sources. Clients have more options today than ever. Work is increasingly in-sourced, outsourced, off-shored—even down-sourced. Despite a history of lawyers resisting the notion of “client feedback,” many law firms are now beginning to redefine their core offering around their clients' business needs. Is this an opportunity for a heightened level of visibility for KM practitioners? How can KM help support or drive innovative service delivery? One thing is for certain, among the critical tools and processes that law firms must master, is the art of collaboration. If law firms are to truly partner with their clients—enhancing the consistency of the client experience and using technology to foster collaboration—then firms must not only better understand what their clients truly want—but also what they're up against in today's rapidly-changing legal market.

PANEL:

Ellen Rosenthal, Chief Counsel, Pfizer Legal Alliance, **Pfizer Inc.**,
Risa Schwartz, KM consultant and former Head of Knowledge Management,
Google, Kathleen Hogan, Senior Counsel & Director of Knowledge Management,
BMO Financial Group, Paul Lippe, CEO, **Legal OnRamp** (moderator)

10:50AM Morning Networking & Coffee Break

11:15AM PANEL DISCUSSION

If We Could Build it from Scratch, What Would We Do?

What would you do differently if you could build a law firm from scratch? What aspects of today's predominant law firm model would you change—and what would you keep intact—if anything? Would the firm bill by the hour? Would it incentivize attorneys differently? Would the partnership model even exist? In one sense, a law firm is a machine that is powered by a multitude of daily, internal processes. If we could start from scratch, how might we make these processes more efficient? How might we approach matter management, business intelligence—or even document preparation processes? This broad-based discussion will challenge the entrenched orthodoxies as our esteemed panel focuses on the standard practices and processes that law firms assume they must do—because that is the way they have always done it—confronted by rationalized business processes (i.e. ones that every other industry has adopted). This open discussion will begin by asking our panel to describe their ideal structure for delivering legal services. How might we “bake” KM into this structure so that KM is not a separate department or function but an integral part of the standard processes and workflows that run the legal service delivery machine?

PANEL:

Jeffrey S. Rovner, Managing Director for Information, **O'Melveny & Myers LLP**,

Robert H. Brunson, Partner, **Nelson Mullins Riley & Scarborough LLP**,
Denis Hauptly, Author, CEO, Information Innovators Group (and former Chief
Innovation Officer at Thomson Reuters Global Resources), Robert Lipstein,
Partner, **Crowell & Moring LLP** and moderated by Scott Rechtschaffen, Chief
Knowledge Officer, **Little Mendelson P.C**

12:30PM Networking Luncheon

1:30PM CASE STUDY

Process Improvement as a Springboard to Innovation

The impact of Legal Process Improvement is very real, particularly from the client's perspective. The practice of law is a process. It may be an incredibly complex process with a large number of variables, but it is a process nonetheless. A number of law firms are taking this process-centric view of the practice of law very seriously and have engaged their own clients in an effort to optimize specific processes to achieve a desired end state. This case study is centered on how one firm is leveraging its client relationships to partner on process improvement initiatives—determining and capturing best practices, driving efficiency, consistency, transparency and predictability in spend. This case study will illustrate opportunities to partner with clients with an interest in *optimizing a specific process* (or set of processes) and how to foster collaboration by focusing on a type of legal work that the firm already handles for a particular client.

Andrew Baker, Director of Legal Technology Innovations Office, **Seyfarth Shaw LLP** & Kim Craig, Director Legal Project Management Office, **Seyfarth Shaw LLP**

2:15PM CASE STUDY

Structuring for Innovation in Today's Legal Marketplace: Re-Defining the Economics of Due Diligence at Bryan Cave

With clients watching legal spend closely, firms must re-calibrate for innovation. They need tools and processes to drive true efficiency in service delivery. and this is not a one-dimensional problem as it includes pricing, planning, management and reporting, as well as execution of the work itself. At Bryan Cave, the answer has been to create structures within the firm aimed precisely at innovation—groups whose job it is to solve difficult problems through new technologies, creative business processes and alternative staffing models. This case study will illustrate how structured innovation helped to create a process to meet ongoing needs—accelerating due diligence to acceptable time frames while also achieving necessary quality levels based on business risk criteria.

John Alber, Partner, **Bryan Cave LLP**

3:00PM Afternoon Networking & Coffee Break

3:30PM WRAP-UP DISCUSSION

Disruption, Transformation, and a Matter-Centric View of Process

After many years of talk and experimentation, many law firms are finally coming to the conclusion that the key to achieving transformation lies in a matter-centric approach to process—enabling firms to connect the dots and the information within different systems in a holistic way, allowing us to truly manage the products we sell by way of understanding the nature of the matters themselves (which are the heartbeat of any law firm). Because information captured about a single matter can be inherited by different people, departments and functions, analyzing information at the matter level is much more efficient and useful—allowing for improvements to the underlying “assembly line” of processes and tasks. This will no doubt increase operational efficiency, lawyer productivity, client satisfaction, and repeatability of services (not to mention profitability)—while embedding KM into organizational workflow. This session will focus on the emergence of disruptive processes along with enabling technology aimed at better managing matters throughout their lifecycle—enabling law firms to monitor workflow to maintain efficiency and profitability.

Oz Benamram, Chief Knowledge Officer, **White & Case LLP** & Christopher F. Boyd, Senior Director of Professional Services, **Wilson Sonsini Goodrich & Rosati**

4:15PM End of Day One/Networking Reception & Drinks

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DAY TWO—Thursday, October 25, 2012

8:30AM Registration & Networking Breakfast

9:00AM Opening Remarks: Conference Chairperson

Joshua Fireman, Founder & President, **Fireman & Company**

9:15AM KEYNOTE

Knowledge Management as a Strategic Enabler

When a giant of the Pharma industry recognized KM as a strategic enabler for their global law department, it seemed KM was already on the way to achieving the status it deserves. But that was only the beginning. KM was to become a key instrument to transform the culture and direction of the global legal function, and the way that it collaborates with its law firm partners. This 5-year story provides unique insights into Novartis Legal, and how KM shaped what it is today.

Corinna Codd, Head Group Legal Strategic Initiatives, **Novartis International AG**

10:00AM PANEL DISCUSSION

Why Is Senior Management Now Driving Knowledge Strategy?

KM's increasing role in firm strategy (and more widespread acceptance by senior practicing attorneys) has been largely driven by economics and the evolving needs of the client. Increasingly, law firm leaders are leaning on KM as primary support to their strategy to adapt to the current transformation of legal services, ensuring their firm is not merely a survivor but a leader. This vision goes well beyond the "traditional KM function" of increasing efficiency, making better use of a firm's expertise and work-product, finding new ways to collaborate with clients and supporting legal project management and new business initiatives. Rather than being motivated solely by these KM benefits, some law firm leaders are establishing KM as a function to be managed at the senior partner level—selecting partners with deep knowledge of the firm's practice and strategy and front line client responsibilities to act as an extension of firm leadership for the KM function. This candid discussion will feature perspectives from such senior partners—who were practicing attorneys throughout their careers and are now doubling as their firm's KM thought-leaders—discussing the implications of KM moving up the food chain strategically for both the business and the practice of law.

Thomas Kennedy, Partner & Global Head of Knowledge Strategy, **Skadden, Arps, Slate, Meagher & Flom LLP**, Kenneth Bender, Partner, **Paul Hastings LLP**, Jack Bostelman, President, **KM/JD Consulting LLC** and former partner, **Sullivan & Cromwell LLP**

10:45AM Morning Networking & Coffee Break

11:15AM PANEL DISCUSSION

Matter Management, Pricing and Profitability

Where does matter management intersect with pricing strategy? Many law firms recognize the need for more sophisticated pricing and profitability analysis in an ongoing effort to help match the risk and reward elements of specific case scenarios. Unfortunately, many firms lack the infrastructure and expertise needed to manage matters that will consistently fall within the firm's profitability parameters—which is likely why we're seeing new functions and committees focused on pricing—attempting to balance profitability with the client's perception of value. How does the analysis of pricing information point to opportunities for greater efficiencies through provision of various kinds of knowledge management services & resources? This discussion will examine the link between pricing, project management and profitability—shedding light on how firms are marshalling their resources to provide the necessary infrastructure, framework and knowledge leadership to manage matters more strategically—such that the firm's rates can be supported by both the firm's clients as well as its partners.

Gene Berger, Manager of Financial Planning & Analysis, **Dechert LLP**
David B. Hobbie, Litigation Knowledge Manager, **Goodwin Procter LLP**
Andrew Terrett, National Director of Knowledge Management, **Borden Ladner Gervais LLP**

12:00PM Networking Luncheon

1:00PM

Asking the Right Questions: The Challenge of Big Data

All of the talk around "Big Data" seems to reflect a fundamental challenge for law firms—that is to become more analytics-driven in an effort to make better (more informed) decisions as we aim to reduce costs, drive profitability, and better understand how to efficiently serve our clients' needs. How exactly are law firms going to break down the walls between structured and unstructured data and extract value from this wealth of information that we are accumulating? Like any other project that involves expending time and money, you first need to know what you want to achieve as an outcome. This lively discussion will focus on how BI, BA, CI and predictive analytics—combined under the KM discipline—can help firms to better serve client needs. As KM broadens its vision and application to meet these new challenges, it becomes critical that we ask the right questions when analyzing large volumes of unstructured data—so we may actually come to know what we know—and more importantly, what we need in order to make course corrections, change business processes and workflows and other decision frameworks enabling law firms to deliver unparalleled breakthroughs in agility and efficiency.

Chad C. Ergun, Director, Global Practice Services & Business Intelligence, **Gibson, Dunn & Crutcher LLP**, Maura R. Grossman, Counsel, Litigation, **Wachtell, Lipton, Rosen & Katz**, V. Mary Abraham, Counsel, **Debevoise & Plimpton LLP**

1:45PM PANEL DISCUSSION

The User Experience: The Artful Application of Technology to the Practice (and Business) of Law

Does design promote adoption? Just ask Apple. One cannot escape the powerful influence of rapid technological innovation. As law firms embrace new technology in support of improved process efficiency, custom client-facing applications, and new ways of managing risk—the user experience becomes vital to the overall success and adoption of any given resource. Attorneys and staff are increasingly dependent on enabling technology in support of day-to-day law firm operations. And we continue to add new tools to the technological toolbox at a staggering rate. This candid discussion will illustrate the importance of the "user experience" when seeking the adoption of new technologies. As client-facing applications become more prevalent, an elegant and intuitive user design actually becomes a reflection of the firm itself.

Tom Baldwin, Chief Knowledge Officer, **Reed Smith LLP**, Patrick V. DiDomenico, Director of Knowledge Management, **Ogletree, Deakins, Nash, Smoak & Stewart, P.C.**, Jean P. O'Grady, JD, MLS, Director of Research Services and Libraries, **DLA Piper LLP (US)**

2:30PM Afternoon Networking & Coffee Break

3:00PM INTERACTIVE CLOSING DISCUSSION

Behind the Curtain: The Future of Legal Technology & Services

Your future technology platforms are designed and developed by your internal staff and your suppliers. In an ideal world, your suppliers should be part of your team, building the tools you need to better serve your clients. However, in order to incorporate new technologies and services into your strategic plans, you need to know what technologies and services your suppliers will be developing in the future. In this fast-paced session, each of our sponsors will have 5 minutes to describe: (a) their product pipeline for the next year and what's driving this, (b) their company's vision for the next 3-5 years, and (c) their view of the legal market in the next 8-10 years. How will your firm invest in the future—search technology, content, analytics, workflow tools, or some other new innovation?

Joshua Fireman, Founder & President, **Fireman & Company**, Kingsley Martin, President & CEO, **KIIAC LLC**, George May, President, **Exemplify**, Martin Tuip, Product Marketing Manager, Information Access and Governance, **Recommend**, Jeroen Plink, CEO, **Practical Law Company, Inc.**, Shy Alter, CEO, **ii3 Inc.**, Liza Madden, Director of Marketing, **Autonomy**, an HP Company

4:00PM Closing Remarks: End of Conference

Joshua Fireman, Founder & President, **Fireman & Company**



Fax back this form to:
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Or call us at:
+1 312 212 1301



Or Email:
pfranken@ark-group.com



Register online at:
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407 S. Dearborn St.
Suite 1335
Chicago, IL 60605

REGISTRATION FORM

Knowledge Management in the Legal Profession 2012 (NY)

Attendee 1

Attendee 2

Attendee 3

Name

Job Title

Organization

Address

Zip Code

Phone

Fax

Email

Signature

I have read the terms and conditions below

Day One Only (OCT 24)	\$995
Day Two Only (OCT 25)	\$995
Full Two-Day Conference (OCT 24-25)	\$1695
Admission for Vendors/Solution Providers	\$1995

- EARLY-BIRD DISCOUNT:** I am registering before [September 5th](#) and would like to claim my 15% early bird discount! (\$1440 for both days)

Please note: payment must be received in full prior to the event to guarantee your place



Card number

Expiration Date

Security Code

- Payment in the mail (checks made payable to Ark Group USA)
 Multiple bookings: please invoice separately

Registration conditions

- Registrations can be submitted at any stage prior to the event, subject to availability. A limited allocation is being held and registering early is therefore recommended, in the event of the registration not being accepted by Ark Group the total amount will be refunded.
- Payment must be received in full prior to the course.
- All speakers are correct at the time of printing, but are subject to variation without notice.
- If the delegate cancels after the registration has been accepted, the delegate will be liable to the following cancellation charges:
 - Cancellations notified over 45 days prior to the event will not incur a cancellation fee.
 - In the event of a cancellation being between 45 and 30 days prior to the event, a 20% cancellation fee will be charged.
 - For cancellations received less than 30 days prior to the event, the full delegate rate must be paid and no refunds will be available.
- All registrations submitted by e-mail, fax, or over the telephone are subject to these booking conditions.
- All cancellations must be received in writing.
- Ark Group will not be held liable for circumstances beyond their control which lead to the cancellation or variation of the program.
- Please make checks payable to Ark Group USA.

Ark Group USA will not use your email address or information for any purpose other than distributing our conference and event notices.

Venue and Accommodations

This meeting will be held at the **AMA Executive Conference Center, New York**, located at 1601 Broadway, New York, NY 10019. For information regarding nearby hotels (most within walking distance to the AMA) please contact Peter Franken at pfranken@ark-group.com or 312-212-1301

Who Will Attend This Conference

Ark Group's 8th annual Knowledge Management in the Legal Profession conference is a highly interactive forum researched with and developed exclusively for directors of knowledge management, business intelligence, law firm operations, CIOs, CMOs, CFOs, heads of library and information services, client, professional and practice support thought leaders—as well as those involved in coordinating or leveraging resources within these functions—including attorneys, practice group leaders and managing partners.

Exhibition & Sponsorship Opportunities

If you are interested in sponsorship opportunities for this (or any) Ark Group event, please contact Kevin Klein for more details at 312-212-1302, or via email at kklein@ark-group.com

PLEASE NOTE: Ark Group cannot be responsible for assisting potential attendees in obtaining visas to the country in which this event is being held. Attendees are responsible for their own travel and visa

Ark Group's 8th Annual
Knowledge Management in the Legal Profession

THIS CONFERENCE WILL BE HELD AT:

AMA Executive Conference Center

1601 Broadway
New York, NY 10019
212.586.8100

<http://www.amaconferencecenters.org/new-york.htm>

October 24-25, 2012 — New York, NY



The executive conference center is conveniently located at 48th & Broadway (inside the Crowne Plaza Hotel) in the heart of New York City's bustling Times Square.

Recommended Hotels (most within walking distance to the venue)

Crowne Plaza Manhattan

1605 Broadway
New York, NY 10019
212.977.4000 > Reservations
<http://www.cpmantimessquare.com/>

The Pearl—New York

233 West 49th Street
New York, NY 10019
Tel: 800-801-3457 or 212-245-4000
<http://www.pearlhotelnyc.com>

Belvedere Hotel

319 W. 48th Street
New York, NY 10036
212.245.7000 > Reservations
<http://www.belvederehotelnyc.com/>

Sheraton Manhattan

790 7th Avenue
New York, NY 10019
212.581.3300 > Reservations
<http://www.starwoodhotels.com/sheraton/property/overview/index.html?propertyID=425>

Marriott Renaissance New York Times Square

714 7th Avenue @ W. 48th Street
New York, NY 10036
212.765.7676 > Reservations
<http://www.marriott.co.uk/hotels/travel/nycrt-renaissance-new-york-hotel-times-square/>

The Lucerne—New York (upper west side—short cab ride)

201 WEST 79 STREET NEW YORK, NY 10024
212.875.1000 OR 800.492.8122
<http://www.thelucernehotel.com/>

Directions and Maps

*AMA New York Executive Conference Center
1601 Broadway
New York, NY 10019*

The following can be used as a guide for your visit to the Executive Conference Center, New York. If you should have any further questions, please do not hesitate to call us at 312-212-1301.

Directions

American Management Association (located in the same building as the Crowne Plaza Hotel) 1601 Broadway at 48th Street near Times Square. Entrance is on 48th Street.

From PENN PLAZA to 1601 BROADWAY (Fastest Route):

1. Going west on W. 33rd St. toward 8th Ave. 0.11 miles
2. Turn RIGHT onto 8th Ave. 0.85 miles
3. Turn RIGHT onto W. 50th St. 0.12 miles
4. Turn RIGHT onto BROADWAY. 0.06 mile **For additional driving directions and maps click here <http://www.mapquest.com/>**

Transportation

Airport Transportation:

Transportation to/from the airport is available for a fee via Super Shuttle. Upon arrival at the airport, proceed to the Ground Transportation desk located near baggage claim, the Super Shuttle agents there will assist you. For your return trip to the airport, contact Super Shuttle at least 24 hours in advance at 1-800-BLUE-VAN x3. New York taxi cabs are also available and rates can vary depending on the airport.

These three airports serve New York City:

John F. Kennedy International Airport, approximately 15 miles (estimate one hour travel time) from mid-Manhattan.

LaGuardia Airport, approximately 8 miles (estimate 30 minutes of travel time) from mid-Manhattan.

Newark International Airport, borders on the cities of Newark and Elizabeth, NJ, approximately 16 miles (estimate 45 minutes of travel time) from mid-Manhattan.

Parking:

There are parking garages available on 48th and 49th streets, as well as at the Crowne Plaza Hotel.

Bus:

From Uptown: **M 7, M 10, M 104**, exit at 50th St. and Broadway.

From Downtown: **M 10, M 104**, exit at 49th St. and 8th Ave.

M 5, M 6, M 7 exit at 49th St. and 6th Ave.

SUBWAY



To 47th-50th St.-Rockefeller Center



To 50th St. & 8th Avenue



To 50th Street



To 49th Street



To 51st Street

