

# Show Guide

*Atlanta*

**LEGAL  
MARKETING  
ASSOCIATION**  
ANNUAL CONFERENCE

April 8–10, 2019 Hyatt Regency, Atlanta

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Building your agenda



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### Mobile:

1. Download the **LMA 2019** app from the [Apple](#) or [Google Play](#) store
2. Log in with your email address and password **LMA2019**

### Website:

1. Visit [www.LMAconference.com/app](http://www.LMAconference.com/app)
2. Log in with your email address and password **LMA2019**

*If you cannot log in, please reset your password. Be sure to use the same email address that was used to register for the conference. If you're having trouble, please email [appsupport@lmaconference.com](mailto:appsupport@lmaconference.com).*



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Conference Advisory Committee

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## Co-Chairs



**Andrew Laver**  
*Business Development Manager*  
**Buchanan Ingersoll & Rooney PC**



**Erin Meszaros**  
*Chief Business Development and  
Client Service Officer*  
**Eversheds Sutherland (US) LLP**

## Committee Members



**Gia N. Altreche**  
*Director of Business Development and Marketing*  
**Newmeyer & Dillion LLP**



**Jeffrey J. Berardi**  
*Chief Marketing Officer*  
**K&L Gates LLP**



**Deborah Farone**  
*Strategic Advisor*  
**Farone Advisors LLC**



**Kristi Gedid**  
*Director, Global Legal Contract Management*  
**Mylan Inc.**



**Diana R. Lauritson**  
*Senior Manager, Business Development*  
**Foley & Lardner LLP**



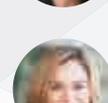
**Daniel Lépine**  
*Chief Client Officer – Vice-President Operations*  
**Alexa Translations**



**Richard A. Marsolais**  
*Legal Marketing and  
Business Development Professional*



**Lisa Simon**  
*Chief Marketing and  
Business Development Officer*  
**Lewis Roca Rothgerber Christie LLP**



**Kate White**  
*Co-founder*  
**Design Build Legal**



**Holly Amatangelo**  
*Interim Executive Director  
Education Director*  
**Legal Marketing Association**

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**Cynthia P. Voth**  
*Director of Client Engagement and Innovation*  
**Miller Nash Graham & Dunn LLP**



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# BODY OF KNOWLEDGE



Created by the Legal Marketing Association

Developed by industry experts and leaders in 2015, the Body of Knowledge (BoK) serves as a master blueprint of learning for the legal marketing and business development community by providing clear standards for benchmarking existing staff, hiring new talent, guiding professional development, fueling LMA educational offerings and more. In 2018, LMA's Education Advisory Council thoroughly reviewed each domain, competency and skill to ensure they were up to date with the legal marketing industry's standards, resulting in the current version of the BoK.

**Check the icons next to each session to see where it aligns within the BoK.**

## Body of Knowledge Domains



**Business  
Development**



**Business  
of Law**



**Client  
Services**



**Communications**



**Marketing  
Management  
and Leadership**



**Technology  
Management**

Visit LMA's booth or [www.legalmarketing.org/body-of-knowledge](http://www.legalmarketing.org/body-of-knowledge) to learn more and to purchase a printed copy of the Body of Knowledge.

# Sit back, we've got this.

MEETINGS

SOURCING &  
CONTRACTING

CLE

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Save **time** and **money** with our expertise and buying power.



# WELCOME TO HOT-LANTA. CAN YOU TAKE THE HEAT?

On behalf of the Legal Marketing Association (LMA) and the 2019 Annual Conference Advisory Committee, we welcome you to the legal marketing and business development industry's most significant annual event. This year's agenda offers both the essential and advanced content you crave, and we guarantee that the practical takeaways you will receive (combined with the opportunities for guided discussion with your peers) will better position you to lead your firm through this era of transformation.

We hope during your time in Atlanta you will make new connections and share ideas that will shape the future of the industry, and experience the genuine and welcoming warmth of LMA's Southeast community. Atlantans mind their manners, believe in a strong community bond and use "y'all" as the pronoun it should be.

See y'all soon!



**Andrew Laver**  
*Business Development Manager*  
**Buchanan Ingersoll & Rooney PC**

A handwritten signature in blue ink, appearing to read "A. Laver".

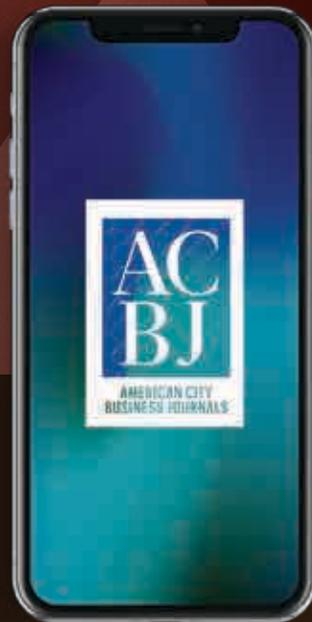


**Erin Meszaros**  
*Chief Business Development and Client Service Officer*  
**Eversheds Sutherland (US) LLP**

A handwritten signature in blue ink, appearing to read "Erin Meszaros".

# X C L U S I V E

P E R K S   A T   L M A



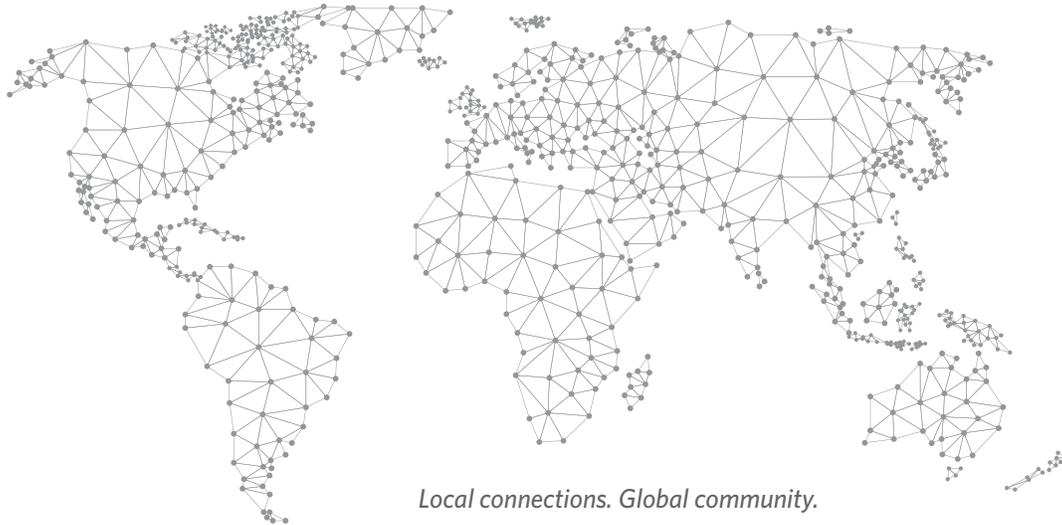
## FREE COFFEE & A CHANCE TO WIN AN IPHONE XR

Join the ACBJ team members  
at Market coffee shop  
(located in the Hyatt Regency atrium lobby)

MONDAY, APRIL 8 7:30 - 9:00 AM  
TUESDAY, APRIL 9 7:30 - 9:00 AM  
WEDNESDAY, APRIL 10 7:30 - 9:00 AM

Register to Win an Apple iPhone XR at [LMAPerks.com](http://LMAPerks.com)

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# Welcome to Atlanta, the largest city in the “Empire State of the South!”

The Legal Marketing Association Southeast Region (LMASE) and the Atlanta Local Steering Committee welcome you to Atlanta for the 2019 LMA Annual Conference. We are excited to share this empire of a city with you. A thriving business and art community, Atlanta offers a wide selection of museums, music venues, sports teams and restaurants.

LMASE is one of the largest regions within the international organization of LMA with over 500 members covering nine states. Educational and networking events are provided at the local level through local steering committees in Atlanta, Birmingham, Charlotte, Columbia, Jacksonville, Louisville/Lexington, Nashville, Orlando, Raleigh/Greensboro/Triad, South Florida and Tampa.

We hope you enjoy learning and networking at the conference, and we also hope you enjoy the amazing city of Atlanta. Below are some of our favorite local must-do activities and places to eat.



## Georgia Aquarium

At one of the world's largest aquariums, you'll find an amazing array of marine life, from belugas to whale sharks to puffins and penguins.



## World of Coca-Cola

The 20-acre complex showcases the history of one of the world's most famous beverage brands.



## Atlanta Botanical Garden

This 30-acre botanical garden is a must. The garden's mission is to develop and maintain plant collections for the purposes of display, education, conservation, research and enjoyment.



## Centennial Olympic Park

This 21-acre public park was built by the Atlanta Committee for the 1996 Summer Olympic Games.



## Martin Luther King, Jr. National Historical Park

This park consists of several buildings, including Martin Luther King, Jr.'s boyhood home and the original Ebenezer Baptist Church, where King was baptized and both his father, Martin Luther King, Sr., and he were pastors.



## The High Museum of Art

A leading art museum in the Southeast, and with more than 15,000 works of art in its permanent collection, it is known for its diverse art collection, featuring an extensive anthology of nineteenth- and twentieth-century American and decorative art; significant holdings of European paintings; a growing collection of African American art; and burgeoning collections of modern and contemporary art, photography, folk and self-taught art, and African art.



## Ponce City Market and Skyline Park

The Market's historic structure, which is the area's largest adaptive reuse project, has been reinvented as a vibrant community hub housing the Central Food Hall, restaurants and various shops. On the rooftop of the Market is Skyline Park, an entertainment space with a breathtaking view of the city.



## Atlanta Food Scene

With an array of amazing restaurants in downtown Atlanta, this website features the best restaurants as a guiding point for visitors.

[www.atlanta.net/Blog/Best-Restaurants-in-Downtown-Atlanta/](http://www.atlanta.net/Blog/Best-Restaurants-in-Downtown-Atlanta/)

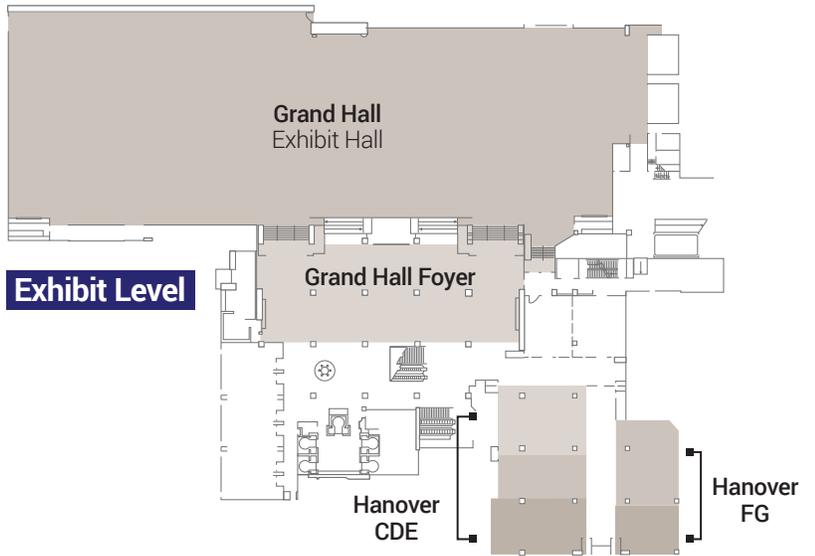
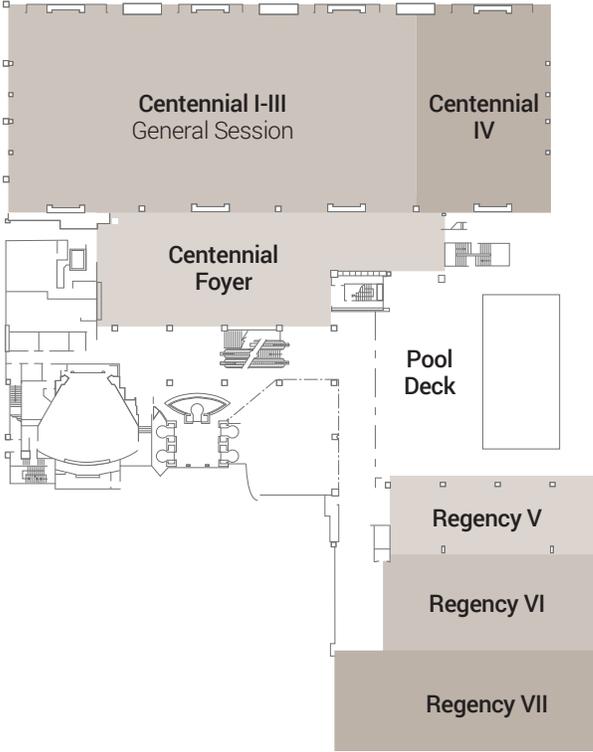


## College Football Hall of Fame

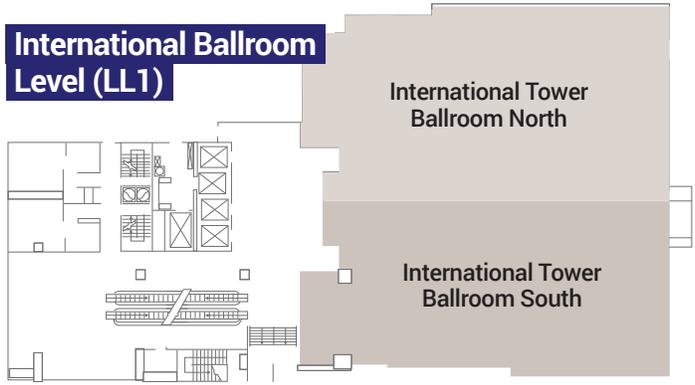
95,000 square feet. A 45-yard indoor football field. More than 50 engaging and interactive exhibits. A shrine to the greatest to ever play or coach the game. All in the heart of downtown Atlanta.

# Event Space

## Ballroom Level



## International Ballroom Level (LL1)



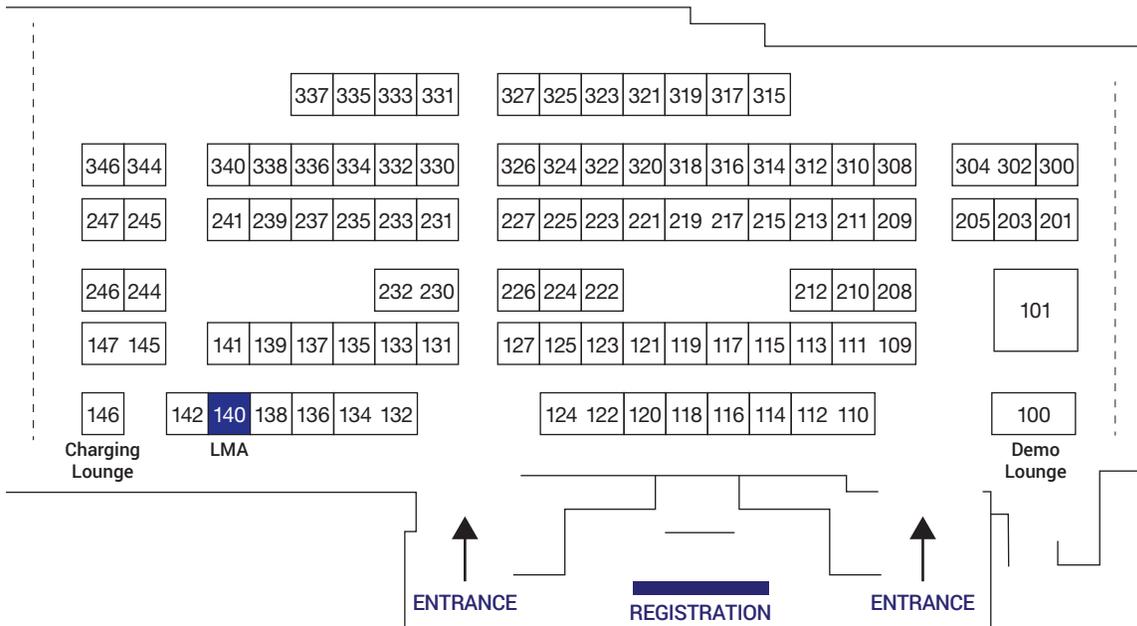
# Exhibit Hall Map

## Exhibit Hall Hours

Monday, April 8  
5:00 – 7:30 p.m.

Tuesday, April 9  
7:30 a.m. – 5:45 p.m.

Wednesday, April 10  
7:30 a.m. – 1:30 p.m.



# Exhibitor Listing

## Company

360 Vertical Solutions (Legal 360)	120
Ackert	308
Acuigen	239
All-State Legal	244
ALM Intelligence	231
Altudo	215
American Association of Law Libraries (AALL)	142
American Bar Association (ABA)	117
Associated Luxury Hotels International (ALHI)	101
Association of Corporate Counsel	221
BeaconLive	335
Best Lawyers	141
Bureau Van Dijk	310
Chambers and Partners	233
ClearlyRated	223
Clearview Social	139
Client Savvy	312
CLIENTSFirst Consulting	225
Clockwork Design Group	327
Concep	241
ContactEase	227
Content Pilot LLC	125
Cubicle Fugitive	235
Debtwire	211
Echelon Printing	338
Enable Business Solutions Limited	315
Firmidable	208
Fliplet	331
Foundation Software Group	133
fSquared Marketing	209
Gittings	124-122
Globe Business Media Group – Lexology	232-230
Gwabbit	116
Imarc	210
Intapp	219-217
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Introhive	340
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Law360	147-145
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## Booth #

## Company

Law Firm CultureShift	136
Leaders League	332
<b>Legal Marketing Association</b>	<b>140</b>
Legal Media Group. Euromoney Institutional Investor	320
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Moire Marketing Partners	326
Mondaq Ltd.	146 (Charging Lounge)
National LGBT Bar Association	316
Objective Manager	135
ON24	237
OnePlace	112-110
Padcaster	137
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Peleman	333
Pitchbook	114
Pitchly Inc	245
Practising Law Institute	336
Pride Products	322
ProofreadNOW	334
Qorus	111-109
RDA Corp.	330
Reorg Research Inc.	314
Right Hat LLC	127
S&P Global Market Intelligence	318
Shift Central	325
Shoosta	323
Siteimprove	224
The Deal	337
The Legal500 Series	123
Tikit	205
Today's General Counsel	119
Vable	212
Versys Software Inc	113
Vuture Group	226
Wilson Legal Solutions	118
xpressdocs	121

# Registration and Exhibit Hall Hours



## Registration Desk Hours

**MONDAY  
APRIL 8**

**TUESDAY  
APRIL 9**

**WEDNESDAY  
APRIL 10**

**8:00 a.m. – 7:30 p.m.**

**7:30 a.m. – 5:45 p.m.**

**7:30 a.m. – 2:30 p.m.**



## Exhibit Hall Hours

**MONDAY  
APRIL 8**

**TUESDAY  
APRIL 9**

**WEDNESDAY  
APRIL 10**

**5:00 – 7:30 p.m.**

**7:30 a.m. – 5:45 p.m.**

**7:30 a.m. – 1:30 p.m.**

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Alden Bianchi, Partner, Mintz

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# Agenda At-a-Glance

## Pre-Conference Programs | Monday, April 8

8:00 a.m. Registration and Breakfast  
 8:45 a.m. – 4:00 p.m. CMO Summit  
 8:45 a.m. – 5:00 p.m. LMA QuickStart® LIVE! – Legal Marketing Essentials  
 Impact Marketing for Small and Mid-Sized Law Firms  
 Breakthroughs in PR, Content and Communications  
 Rise of the Legal Marketing Technologist

1:00 – 5:00 p.m. Developing a Roadmap for Deliberate Diversity and Informed Inclusion  
 2:00 – 5:00 p.m. Applying Design Thinking Principles to Create Change

## Networking Opportunities | Monday, April 8

4:00 – 5:00 p.m. CMO SIG Reception  
 4:45 – 5:00 p.m. Conference Mentoring Program Meet Up  
 5:00 – 6:00 p.m. First-Timers' Reception  
 5:00 – 6:00 p.m. Exhibit Hall Sneak Peek  
 6:00 – 7:30 p.m. Exhibit Hall Welcome Reception  
 7:30 – 8:30 p.m. LMA Regional Receptions

## Conference Day One | Tuesday, April 9

7:30 a.m. Registration Opens  
 7:30 – 8:30 a.m. Breakfast in the Exhibit Hall  
 8:00 a.m. General Session Doors Open  
 8:30 – 8:45 a.m. Welcome and Opening Remarks

**Spotlight Session**  
 8:45 – 9:30 a.m. Is ABA Rule 5.4 Keeping Nonlawyer Competitors Out, or Lawyers in?  
**Keynote Presentation**  
 9:30 – 10:30 a.m. We Can All Be Movement Starters  
 10:30 – 11:15 a.m. Networking Break in the Exhibit Hall

## Concurrent Breakout Sessions

BREAKOUT ONE	BREAKOUT TWO	BREAKOUT THREE	BREAKOUT FOUR	BREAKOUT FIVE	BREAKOUT SIX
11:15 a.m. – 12:15 p.m.					
LMA's Next Big Thing: Service Metamorphosis – Driving Performance Improvement	Legal Operations and Legal Marketing: Collaborating for Success	The Practical Implications of Change to ABA Rule 5.4, the 'Non-Lawyer' Ownership Rules	Diversity From the Client Perspective: Smart Strategies to Winning Business	Building Your Proposal Technology Blueprint	David vs. Goliath: The Competitive World of Plaintiff Firm Marketing
12:15 – 1:30 p.m. <b>Networking Lunch</b>					
1:30 – 2:30 p.m.					
From PSO to PSB: A New Model for Creating Differentiated Brand Experiences	Alternative Legal Service Providers (ALSPs) Are No Longer Alternative	Serve Clients While You Sleep	Crazy, Rich Collaboration – Notes From the Field on How to Get IT and Firm Leadership Onboard	How to Turn CRM Into an Insights Engine	Strategies for Launching and Measuring the Impact of Your Law Firm Alumni Program
2:30 – 3:15 p.m. <b>Networking and Refreshment Break in the Exhibit Hall</b>					
3:15 – 4:15 p.m.					
Power Your Firm's Growth by Adopting a Key Client Strategy	How to Use the Right Data, Right. Validate Initiatives, Create Transparency and Engage Your Fee Earners	Driving Growth: Building Your Ability to Lead the Lawyers to Bring in More Profitable Business <b>DEEP DIVE</b>	Whither the Bellwethers? How Current Legal Market Economics Will Impact Your Firm	Making It or Faking It? Effective Industry Sector Strategy Workshop <b>DEEP DIVE</b>	Keeping the Billing Tail From Wagging the Law Firm Dog
4:30 – 5:15 p.m.					
Like a Shark: How to Apply Intelligence and Killer Instincts to Dominate Marketing Technology	Creating a Niche Market at Mid-Sized Firms		Streamlined, Actionable and Transparent Partner Business Plans		Balancing on the Data Tightrope – Too Little on One Side and Too Much on the Other Means an Inevitable Fall
5:15 – 5:45 p.m. <b>End of Day One Wrap Up</b>					
6:30 – 8:00 p.m. <b>Networking Reception – The Roof at Ponce City Market</b>					

## Exhibit Hall Hours

Monday, April 8  
 5:00 – 7:30 p.m.

Tuesday, April 9  
 7:30 a.m. – 5:45 p.m.

Wednesday, April 10  
 7:30 a.m. – 1:30 p.m.

# Agenda At-a-Glance

Gain access to all the breakout sessions with the 2019 Conference Recordings. Order by April 11 for only \$95!

Ask for details at the conference registration desk.

## Conference Day Two | Wednesday, April 10

- 7:30 a.m. Registration Opens
- 7:30 – 8:30 a.m. Breakfast in the Exhibit Hall
- 7:30 a.m. – 1:30 p.m. Exhibit Hall Open
- 8:15 a.m. General Session Doors Open
- 8:30 – 9:00 a.m. LMA Annual Report
- 9:00 – 9:30 a.m. LMA Hall of Fame Award Presentation

- 9:30 – 10:30 a.m. An Inside View: General Counsel Perspectives on the Use of Alternative Legal Service Providers and Artificial Intelligence
- 10:30 – 11:15 a.m. Networking and Refreshment Break in the Exhibit Hall
- 10:45 – 11:15 a.m. Networking for Prizes Drawing in the Exhibit Hall

## Concurrent Breakout Sessions

BREAKOUT ONE	BREAKOUT TWO	BREAKOUT THREE	BREAKOUT FOUR	BREAKOUT FIVE	BREAKOUT SIX
11:15 a.m. – 12:15 p.m.					
What's Next: Career Development for the Mid-Career Professional <b>A</b>	5 Essentials for Becoming a High-Powered Digital Marketing Organization <b>E</b>	Can We Learn From Uber, Amazon and Others and Use Data to Give People What They Actually Want From a Law Firm Website? <b>A</b>	Driving Top-Line Growth With a Killer Proposal Strategy <b>A</b>	The Perfect Pitch: Through the Eyes of Clients <b>A</b>	Social Responsibility and Sustainability Programs – and Why Law Firms Should Care <b>A</b>
12:15 – 1:30 p.m. <b>Networking Lunch</b>					
1:30 – 2:30 p.m.			1:30 – 3:45 p.m.	1:30 – 2:30 p.m.	
Business Development Insights and Best Practices From the Big 4 <b>E</b>	How to Secure a Seat and Have Your Voice Heard at the Power Table <b>A</b>	Market Positioning: The First Step in Differentiating Your Firm <b>E</b>	Beyond Branding: Aligning Social Media Strategy With Business Development Goals <b>A</b> <b>DEEP DIVE</b>	The Third Rail: Adding a Sales Function to Grow the Top Line <b>A</b>	Buyer Behavior by the Numbers: A Cross-Generational Look at Decision Influences and Drivers of Engagement for Legal Buyers <b>E</b>
2:45 – 3:45 p.m.				2:45 – 3:45 p.m.	
The Outsourced Resource: How to Identify, Hire and Leverage Consultants With Internal Resources to Achieve Your Strategic Objectives <b>A</b>	Leveraging LinkedIn's Navigator to Scale Business Development <b>A</b>	Old Wine Isn't for New Bottles: Break Bad Communication Habits That Are Holding You Back <b>E</b>		CRM Therapy – The (Juris) Doctor Is in: Client CRM Confessions <b>E</b>	Million-Dollar Boot Camp <b>A</b>
4:00 – 4:30 p.m. <b>Conference Wrap Up</b>					
4:30 p.m. <b>Conference Concludes</b>					

Friends of Bill meetings will be held at 7:00 – 8:00 a.m. on Monday, Tuesday and Wednesday (in the Heritage Room on LL2).

## Be sure to incorporate the exhibit hall into your conference schedule

The exhibit hall is an integral and dynamic part of the annual conference, connecting you with companies offering the latest legal marketing products and services and featuring cutting-edge technology. Be sure to stop by and learn from the many marketing experts working with your peers from across the industry.

It is an exceptional one-stop opportunity for attendees to find solutions and for exhibitors to reach legal marketing and business development professionals. It is also an excellent base during the conference – a place to meet colleagues before the next set of events.



## Breakout Session Key

Conference breakout sessions are aligned directly with the LMA Body of Knowledge domains.

**Business Development** drives new business and increased revenue for the law firm – both directly and indirectly – through client and prospect outreach, attorney coaching and mentoring, and market intelligence.

**Business of Law** includes understanding the legal profession, evaluating firm financial and operational performance, building strategies to leverage market opportunities, and implementing practices that maximize performance.

**Client Services** consists of the techniques, processes and standards by which law firms' professional staff serve the lawyers in the firm and the clients of the firm, including the disciplines of project management and process improvement.

**Communications** entails developing and implementing internal and external messaging strategies to broaden the impact of the firm's programs and brand position.

**Marketing Management and Leadership** establishes and effectively manages a highly functioning marketing organization through people and processes that foster collaboration and drive overall business objectives.

**Technology Management** includes identification, implementation and effective management of the technologies and technology staff that support marketing and business development.

## Competency Level

**A** Advanced **E** Essential



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- Sonesta Resort Hilton Head Island
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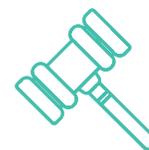
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Are you a marketer with less than five years of experience working inside a law firm? Would you like to refresh your knowledge of the core competencies and best practices of legal marketing? The popular LMA QuickStart® LIVE! program is for you.

LMA QuickStart® LIVE! is a comprehensive program focused on the key marketing and business development issues you face every day. The speaker faculty will offer no-nonsense advice that will challenge you, as well as practical tools and skills you can apply immediately.

8:00 a.m. **Registration and Breakfast**

8:45 a.m. **Co-Chairs' Opening Remarks**



**Brook Redmond**  
*Director of Business Development*  
**Baker, Donelson, Bearman,  
Caldwell & Berkowitz PC**



**Roy E. Sexton**  
*Senior Manager, Marketing*  
**Clark Hill PLC**

**Welcome to Legal Marketing! What Should You Expect?**

9:00 a.m. **Culture Shock, What You Don't Know About Law Firms**

Increase the probability of success at your law firm. Two law firm marketing veterans will share their experiences in the dynamic law firm culture and tools and insights to help you thrive in the next wave of law firm changes.

You will learn:

- What is unique about law firm culture
- How to raise your profile within your firm and position yourself for success
- How to be a change agent at your firm
- How to collaborate with your firm-wide peers



**Bobbie Conklin**  
*Business Development Manager*  
**Stephoe & Johnson PLLC**



**Rachel Shields Williams**  
*Senior Manager,  
Experience Management*  
**Sidley Austin LLP**

9:50 a.m. **Think Like a Marketer. Act Like an Owner.**

What can you do early in your legal marketing career to succeed? Join Gail Lamarche and Nancy Myrland as they share how they advanced their careers over the past 20-plus years. Learn how to set and manage expectations with senior leadership, identify ownership of projects and tasks, and make yourself invaluable.

You will learn:

- How to identify and use your personal brand to guide your career
- How to communicate and handle your first goal-setting meeting with leadership
- How to identify and develop skills that are critical for success



**Gail Lamarche**  
*Director of Marketing and  
Business Development*  
**Henderson, Franklin,  
Starnes & Holt PA**



**Nancy Myrland**  
*President*  
**Myrland Marketing  
& Social Media**

10:45 a.m. **Networking and Refreshment Break**

**Welcome to Management! Let's Get Literate.**

11:00 a.m. **LMA Family Feud! QuickStart® LIVE! Edition**

It's time to play...*LMA Family Feud!* Heather Morse and Jonathan Fitzgarrald will challenge QuickStart® LIVE! contestants to answer critical questions that will determine their success, like:

- What battles are *not* worth fighting with your lawyers?
- What are the best ways to anticipate lawyers' needs?
- How can you creatively uncover cross-marketing opportunities?
- Who holds the power within your firm?
- What do you do daily that has the greatest impact?

With the top five answers on the board for each question, do you have what it takes to take home the prize? Survey says...



**Jonathan Fitzgarrald**  
*Managing Partner*  
**Equinox Strategy Partners**



**Heather Morse**  
*Director of Marketing*  
**Greenberg Glusker Fields  
Claman & Machtinger LLP**

11:50 a.m. **Positioning Yourself for Success: The Data at Your Fingertips**

As you navigate the murky waters of legal marketing, you may feel more reactive than proactive, under-resourced, over-utilized and overwhelmed. In this session, you will learn one of the biggest secrets to success: knowing how to embrace challenges and focus on now. By utilizing every resource available to you at the firm, you can provide new and relevant information to every conversation and insights management may not see.

You will learn:

- Using data/metrics to advocate change
- Adding value to every conversation
- Learning as much as you can about your job function, practice areas/industry teams and primary focus of the firm
- Remaining ahead of the curve on business trends in the legal profession



**Christine Mitchell Harris**  
*Business Development Executive*  
**Foley & Lardner LLP**



**Rebecca Wissler**  
*Practice Director*  
**Adams and Reese LLP**

12:30 p.m. **Networking Lunch**

**Sandwich Generation – What Does a “Middle Manager”  
Role Look Like in Legal?**

1:30 p.m. **You Don't Need a Title to Lead**

It is often assumed that leaders become validated with titles. But true leaders can come from any place at any time. With teams in the legal industry growing and becoming more dynamic, we all have the ability to lead. This session will explore how to confidently express your true leadership style and use it to enhance your daily activities.

Join two legal marketing veterans and leadership experts as they reveal how they engage aspiring leaders to find their voice and leverage it in their companies, teams, projects and personal lives.

You will learn:

- What defines true leadership and how it complements the concept of followership
- How to get the most out of team members, no matter what your title
- How to communicate and implement your leadership style with a change of role or firm



**Mark Beese**  
*President*  
**Leadership for Lawyers**

2:30 p.m. **Down the Highway: Navigating Your Career and How to Avoid  
Traffic Jams**

How do you define your unique path of fulfillment and success? This session will highlight career paths in legal marketing and provide practical tips for professional advancement in the form of a customizable MAP (My Action Plan).

You will gain an overview of the legal market and key players and trends to watch. Plus, you will take away advice on relationship building with peers and mentors and networking with lawyers and other marketing professionals.

You will learn:

- Detailed descriptions of career paths in legal marketing, including business and practice development, marketing technology, and communications and media relations
- How players in the legal market interact with legal marketers
- Whom to know, how to meet them, who needs to know you and how to use your GPS to solicit constructive feedback about your performance
- Lessons in staying engaged and preventing burnout and apathy
- Written professional development plan and follow-up resources



**Stephanie Hinrichs**  
*Director of Client Service*  
**Womble Bond Dickinson  
(US) LLP**



**Carman Jackson**  
*Marketing and Business  
Development Manager*  
**Akin Gump Strauss Hauer  
& Feld LLP**

3:30 p.m. **Networking and Refreshment Break**

3:45 p.m. **Got Your Eye on the C-Suite? Learn From Some of the Best**

Hear leading CMOs in the legal industry candidly discuss pivotal moments and skills that accelerated their rise to leadership positions, how they maximize the potential and fulfillment of their teams, what it takes for team members to exceed their expectations, and what a typical day looks like for a CMO (dispelling the myths). Gain practical advice and recommendations to use on your professional journey while networking with some of the best.



**W. Allen Fuqua**  
*Principal*  
**Allen Fuqua Strategies**



**Lee Y. Watts**  
*Chief Marketing Officer*  
**Smith, Gambrell & Russell LLP**



**Kerry M. Price**  
*Chief Strategy Officer*  
**Bass, Berry & Sims PLC**



**Moderator:**  
**Clinton Gary**  
*Chief Strategy and  
Business Development Officer*  
**Burr & Forman LLP**

4:30 p.m. **LMA QuickStart® LIVE! Jam Session**

In this “jam session,” we want to hear from you. What questions remain? Did anything surprise you? How might today's presentations impact your career path? The LMA QuickStart® LIVE! co-chairs will lead a discussion about the challenges you are facing, opportunities you hope to pursue and best practices you need to succeed.

5:00 p.m. **Program Conclusion**





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Discover the specific tools required to be a successful business development and marketing leader in a small to mid-sized law firm, when time, people and money are limited and stretched to capacity.

These sessions will leverage the knowledge and experience of in-house marketers and consultants who have built innovative programs executed in this environment. You will examine a variety of business development and marketing topics and case studies and leave with a clear action plan for maximizing existing resources and tapping into new resources to exceed expectations.

8:00 a.m. **Registration and Breakfast**

8:45 a.m. **Co-Chairs' Opening Remarks**



**Katy Corrigan**  
Director of Marketing  
Langley & Banack Inc.



**Diana L. Courson**  
Chief Marketing Officer  
Zuckerman Spaeder LLP

9:00 a.m. **Overcoming the Fear of Failure at Your Firm**

Whether a first-year marketer or seasoned professional, you may have a fear of failing, fueled by lawyers (and staff) who frustrate and intimidate. This fear can be immobilizing, but what does "failure" actually mean? A failure to one person might simply be a great learning experience for someone else.

In this session, you will learn how to work with demanding and difficult personalities and examine the "imposter syndrome," which feeds two basic kinds of fear: action and inaction.

You will learn:

- How to stop feeding your fears and optimistically focus on your successes
- How procrastination plays a role
- How to understand the language/perceptions of others and adjust your behavior accordingly
- How to bolster your confidence and live a fearless existence at your firm



**Jennifer A. Cameron**  
Marketing and Business Development Manager  
McKool Smith

9:45 a.m. **Startup Legal Marketing: Tools and Lessons Learned in Running a Marketing and BD Department**

Are you the first marketing professional your firm hired? Are you a team of a team of one, one and a half or two and not sure where to start in creating a business development culture? Find out how Sheenika Gandhi won the respect of her lawyers and implemented the firm's first marketing budget, and gain lessons she learned from wearing multiple hats day after day.

You will learn:

- How to create a budget that works for the culture of your firm
- How to launch a beta business development coaching program
- How to tackle random acts of events and sponsorships
- How to implement essential technologies within a limited budget



**Sheenika S. Gandhi**  
Director of Marketing and Business Development  
Payne & Fears LLP

10:45 a.m. **Networking and Refreshment Break**

11:00 a.m. **Seeing 2020: Setting Your Sights on Extraordinary Client Experience**

According to Walker, a customer experience consulting firm, "by the year 2020, [client] experience will overtake price and product as the key brand differentiator."

In this session, you will look at the differences between client service/feedback and client experience. Plus, you will see how other organizations are building their building their customer experience (CX) programs and creating initiatives that you can readily implement within your own firm. Get ready to envision a future of extraordinary CX.

You will learn:

- What CX is and who in your firm should be involved
- What other organizations are doing to promote and execute CX programs
- Ideas for creating and/or implementing CX programs within your firm
- Outcomes from successful CX initiatives



**Richard Bracken**  
Director of Coaching  
Society 54



**Heather McCullough**  
Partner  
Society 54

12:30 p.m. **Networking Lunch**

1:30 p.m. **Client Experience Optimization: The Content Journey and How to Use Big Data to Better Understand Your Clients**

Firms are feeling the impact of rapidly changing technologies and the market's demand for a more personalized and relevant online journey. In this session, you will learn how to implement strategic changes to your digital platform to meet ever-evolving client expectations and deliver the right information to the right visitor at the right time. Discover how to put client experience optimization — the art of providing users with a frictionless, intuitive, efficient and customized journey — at the core of your website strategy.

You will learn:

- How technological advancements allow firms to customize the online visitor experience
- Where to start and how to segment markets and develop meaningful client experiences
- How to personalize the journey based on markets, interests and previous user-metrics
- How to track and analyze each visitor's movement through your website for an end-to-end view that ensures you provide the most relevant information to them

This session will draw from a case study on how a complete personalization strategy was implemented and provide key takeaways and learnings from other firms.



**Morgan MacLeod**  
Ringmaster  
Cubicle Fugitive

2:30 p.m. **Bear Traps, Quicksand and Indifference: How to Avoid Them and Deliver ROI for Your CRM**

Law firms are at a tipping point in technology and how it can drive success and revenue generation. For the first time, data is considered "cool" and firms are waking up to new possibilities.

As artificial intelligence, business intelligence and big data take hold, here is an opportunity to describe your experience with these technologies and examine the foundations required for delivering successful CRM programs. You will focus on experience management, cross-selling, referral tracking, segmentation and data mining, and how data and technology supports these programs. You will leave knowing how to implement these technologies to deliver real ROI.

You will learn:

- How a major law firm succeeded in revolutionizing their CRM
- A list of "golden rules" you can apply within your own firm
- How new technologies can support your underlying business processes



**Paul VanderMeer**  
Chief Knowledge Officer  
Bilzin Sumberg Baena  
Price & Axelrod LLP



**Michael Warren**  
CRM Consultant  
Wilson Allen

3:30 p.m. **Networking and Refreshment Break**

3:45 p.m. **Law Firm Business Development: Coaching for Coaches**

It's not enough to just hire experienced marketing and business development professionals — you also have to train them to coach your lawyers. Client demands, information accessibility and the technology explosion have resulted in a rapid change of pace and an "age of business development specialization." To stay competitive, productive and profitable, you must recognize the need for ongoing, results-driven internal coaching (training) programs.

This session will focus on the practical platform skills and confidence your team needs to succeed and put the latest BD trends and techniques at your fingertips.

You will learn:

- The background and theory behind business development coaching for lawyers
- Tips for effectively communicating key messages while coaching
- Best practices for utilizing business development interactive/experiential delivery tools and techniques, including individual business development plans and pipeline management
- Strategies for managing touchy topics, such as listening to your clients' needs and asking for business



**Trish Lilley**  
Chief Marketing and  
Business Development Officer  
Stroock & Stroock & Lavan LLP



**Stuart N. Goodman**  
Chief Business  
Development Officer  
Goodman Business  
Development

4:30 p.m. **Jam Session**

Wrap up your Impact Marketing pre-conference by participating in this group conversation, facilitated by the Small Firm/Solo Marketer SIG co-chairs. You will talk about how to implement what you heard during the day and solicit ideas about how to balance the benefits and pressures of navigating within the small and mid-size firm environment.

5:00 p.m. **Program Conclusion**



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Communications are central to legal marketing and provide marketers with powerful ways to enhance the visibility of their firms, lawyers and brand through a variety of mediums — new and old.

This interactive program will explore the critical components of implementing a successful communications strategy using the latest public relations, content marketing and technology tools.

8:00 a.m. **Registration and Breakfast**

8:45 a.m. **Co-Chairs' Opening Remarks**



**John Buchanan**  
Senior Communications Manager  
**Sheppard Mullin Richter & Hampton LLP**



**Ryan King**  
Director of Communications  
**Ogletree, Deakins, Nash, Smoak & Stewart PC**

9:00 a.m. **Storytelling for Business – Harnessing the Power of Story**

Learning how to craft and tell persuasive, memorable and impactful stories is the key to good communication. It's not enough to write a case study or pack a presentation with impressive facts. Breaking through the noise to get your message across requires connecting on an emotional level with your audience and making them care. Well-told and true stories can help you land a job, client and referral source. Professional storyteller Tracey Segarra will teach you the building blocks of effective stories and how to leverage them in your firm and life.

You will learn:

- The five beats of effective storytelling
- The science behind why storytelling works
- How to find the important stories in your organization



**Tracey Segarra**  
Director of Marketing  
**Margolin, Winer & Evens LLP**

10:00 a.m. **Digital and Content Optimization: The Power of Data-Driven Storytelling**

Are you collecting mountains of data from your marketing campaigns, but are not sure what to do with it? Are you trying to get your thought leadership in front of decision-makers exactly when and where they want it? Part one of this interactive session will introduce the iterative design cycle and the data capture and testing methodologies that drive it. During part two, you will discuss how leading marketers harness data to devise, document and continually evolve their content strategies and tactics.

You will learn:

- The tenets of the iterative design cycle and how to apply them across workstreams
- Guidelines for web- and campaign-specific data capture/measurement
- Effective methodologies to analyze and incorporate data into content development
- Content strategy, development and distribution best practices across professional services
- Tips for harvesting readership data to fuel relevant, useful and timely content for key audiences



**Brandon Copple**  
Director of Content Strategy  
**Greentarget**



**John Matthew (JM) Upton**  
Director of Digital Strategy and Analytics  
**Greentarget**

10:45 a.m. **Networking and Refreshment Break**

11:00 a.m. **Using Data to Fine-Tune Your Firm's Content Investment and Business Development Initiatives**

Gone are the days of random acts of content. Successful publishing initiatives require planning and follow-through. Adrian Lurssen will provide strategic insights, case study examples and action items you can implement right away. Learn how to incorporate metrics into your thought leadership programs so you are not simply increasing the reach of your brand visibility, but are also surfacing and acting upon the opportunities that lead to business growth.

You will learn:

- How to find BD opportunities in the engagement with your work
- What really matters when talking about content metrics
- How to fine-tune your ongoing writing based on analytics
- How content marketing supports BD, not just branding
- Types of data and the opportunities they represent



**Adrian Lurssen**  
Co-Founder and Vice President of Strategic Development  
**JD Supra**

11:45 a.m. **How to Craft a Campaign-Driven Marketing Strategy for Your Firm**

A marketing campaign is a collection of activities (email, social media, events, videos) aimed at a specific audience and centered around a specific message.

Without direction, a marketing activity's message becomes less focused and effective. A campaign approach lets the firm focus their attention more narrowly and track their results more precisely.

This session will show how to build a successful campaign-driven marketing strategy and generate better ROI from your marketing efforts.

You will learn:

- What campaign driven marketing is
- How to craft a single campaign using targeted content

- What channels you should consider to reach your target audience
- How to measure the engagement and success of your marketing campaign
- How marketing campaigns can help you generate meaningful business results



**Guy Alvarez**  
Chief Executive Officer  
**Good2bSocial**



**Jay T. Plum**  
Director of Communications  
**Bracewell LLP**

12:30 p.m. **Networking Lunch**

1:30 p.m. **The Pressure's On: What PR Professionals Can Do to Help the Media in Journalism's New World Order**

As if the news media hadn't already experienced enough change — now we've fake news, "alternative facts," elected officials trying to strangle free speech, and citizen journalists acting as if only their opinions matter. If any of this sounds interesting to you, join us for a lively panel discussion featuring an outstanding group of seasoned journalists. We'll look at how journalism has changed over the last few years; what challenges lie ahead; how PR professionals can best help the media; and how the media and PR people can/should all work together to ensure accurate, quality, unbiased reporting. We'll also talk about social media and its ongoing impact on news, journalism and communications.



**Kate Brumback**  
Reporter  
**The Associated Press**



**Meredith Hobbs**  
Staff Reporter  
**Daily Report**

Moderator:



**Erin West**  
Media Relations & Communications Manager  
**Dechert LLP**

2:15 p.m. **Target Practice – Preparing Law Firms for a Crisis**

Law firms face myriad potential crisis situations that can cause serious damage to reputation and revenue. Leader indiscretions, legal malpractice claims, harassment lawsuits, negative revenue reports, practice group departures and cybersecurity data breaches are just some of the scenarios that have necessitated reputation management. What is your law firm doing to proactively protect one of its most valuable assets?

You will learn:

- Stages of crisis planning and management
- How to protect your firm's reputation
- How to protect your firm's digital footprint



**Cheryl Bame**  
Principal  
**Bame Public Relations**



**John M. Byrne**  
Chief Marketing Officer  
**Gould & Ratner LLP**



**Gina F. Rubel**  
Founder and Chief Executive Officer  
**Furia Rubel Communications, Inc.**



**Jasmine C. Trillos-Decarie**  
Chief Client Service Officer  
**Stoel Rives LLP**

3:30 p.m. **Networking and Refreshment Break**

3:45 p.m. **Choosing a PR Partner**

You might have the resources to handle public relations in-house, but if not, you must identify a PR partner that fits with your firm. Do you know how? Do you need help getting started? This session will provide perspectives from those in law firms and PR agencies on how to select a PR partner who feels less like an external consultant and more like a part of your internal team.

You will learn:

- How to evaluate your current PR agency
- When to do an RFP
- What a PR RFP should include
- Ways to review submissions to gain more information about agencies and how they will work with you
- What you shouldn't ask for in an RFP



**Kevin E. Broyles**  
Co-Managing Partner and Co-Founder  
**FisherBroyles, LLP**



**Michelle McCormick**  
Senior Vice President, Public Relations  
**Jaffe PR**



**Elizabeth W. Tumminia**  
Chief Marketing Officer  
**Pashman Stein Walder Hayden, P.C.**

4:30 p.m. **PR Jam Session**

Wrap up your PR pre-conference by talking about what's remained unspoken. Join LMA's PR SIG co-chairs as they pull from the Jam Box questions submitted anonymously by you and facilitate a group conversation driven by what's on your mind.

Swap war stories and talk about what's working (and what's not), where your roles are headed and the pressures you face to deliver more value with fewer resources. Cap the session off with a wish list of what you want your firm and clients to do!

5:00 p.m. **Program Conclusion**





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**Michelle Lang at McDermott Will & Emery LLP**

Associate Director of Client Service



Clients' expectations for legal services are changing. And with this comes the proliferation of new technologies and alternative service delivery sources, together with new workforce realities for how law firms serve clients in a global economy. These market innovations and disruptive forces require CMOs to evolve and lead through this change with creative resolve and agility.

This summit will provide participants with a highly interactive view into this transformative landscape and perspective on how best to position their firms for success. Session topics will include special guests from within and outside of the legal industry.

8:00 a.m. **Registration and Breakfast**

8:45 a.m. **Co-Chairs' Welcome**



**Michael J. Mellor**  
Director of Marketing and  
Business Development  
Pryor Cashman LLP



**Anne Malloy Tucker**  
Chief Marketing Officer  
Hunton Andrews Kurth LLP

8:50 a.m. **Introductions and Agenda Outline**



**Mark E. Young**  
Counsel  
Vox Actio LLC

9:00 a.m. **Why and How Clients' Expectations for Legal Services Are Changing**

What the research shows about new skills and working relationship requirements.



**Michele DeStefano**  
Professor of Law  
University of Miami  
Guest Faculty, Harvard Law School Executive Education

10:00 a.m. **Interactive Reflection Exercise: Changing Client Expectations**

10:30 a.m. **Networking and Refreshment Break**

10:45 a.m. **From Surviving to Thriving: Lessons on Business Agility and the Future of Work**

In the increasingly competitive legal market, clients are demanding greater agility and responsiveness from their outside counsel and seeking highly specialized, yet cross-functional teams to handle their most complex, high-stakes legal challenges. Rob Biederman, CEO of Catalant, will discuss how his company's AI technology and agile operating model is transforming the delivery of professional services.



**Rob Biederman**  
Co-Founder and Chief Executive Officer  
Catalant Technologies

11:45 a.m. **Networking Lunch**

12:30 p.m. **New Models for Hiring, Retaining and Engaging Talent**



**Jamal Stockton**  
Head of Legal Innovation and Digital Enablement  
Fidelity Investments



**Scott A. Westfahl**  
Professor of Practice and Faculty Director,  
Harvard Law School Executive Education  
Harvard Law School

1:30 p.m. **Panel Discussion: The Fast-Changing Competitive Landscape**

**Panelists:**



**Andy Daws**  
Chief Customer Officer  
Kim Technologies/Riverview Law



**James Peters**  
Vice President of Legal, New Market Initiatives  
Legalzoom



**Jamal Stockton**  
Head of Legal Innovation and Digital Enablement  
Fidelity Investments



**Matthew "Mateo" Willmott**  
Director, Lawyer Talent  
Axiom

**Moderator:**



**Mark E. Young**  
Counsel  
Vox Actio LLC

3:00 p.m. **Client Engagement Town Hall Discussion**

How and why one of the leading museums in the United States created a neuroscience-informed approach to the design of art experiences.



**Tedi Asher, PhD.**  
Neuroscientist-in-Residence  
Peabody Essex Museum

4:00 p.m. **Program Conclusion**

Program created and presented by:



**Mark E. Young**  
Counsel  
Vox Actio LLC

Mark is Counsel at Vox Actio LLC, a consultancy that helps law firms, in-house legal departments and other service organizations discern and advance client engagement and service delivery priorities. Mark works at the intersection of client and professional development.

A lawyer for over 30 years, Mark's unique vantage point and perspective is informed by his service as a law firm partner, corporate general counsel, and business leader for global, national and regional law firms.

Mark is a native Bostonian. He received his J.D. from Boston College Law School and his undergraduate degree from Bates College.

4:00 – 5:00 p.m.

**CMO SIG Reception**  
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CMO Summit participants and members of LMA's CMO Shared Interest Group (SIG) are invited to attend this reception.



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Marketing technology is no longer something that's nice to have. It is crucial to how we run our firms. It is constantly changing, bringing with it advancements that drive our strategy and process. Using it creatively and efficiently can set firms apart from one another. Using it poorly can set firms down an expensive path of problems and low adoption that can take years to course correct.

This program is focused on optimization of the marketing technology stack, where speakers will address some of the most important innovations — and problems — that legal marketers encounter.

## 8:00 a.m. Registration and Breakfast

## 8:45 a.m. Co-Chairs' Opening Remarks



**Mary M. Tomaro**  
Web and Interactive  
Marketing Manager  
Jones Day



**John T. Witts**  
Senior Marketing  
Technology Manager  
Drinker Biddle & Reath LLP

## 9:00 a.m. Where Are We Now? Results of ILTA's Legal Marketing Technology Survey

In 2018, ILTA launched the first marketing technology survey for law firms and nearly 100 firms responded. We realized just how much marketing technologies have expanded when we needed 55 questions to cover them all! The survey covered nine major categories of marketing technology: CRM, Experience Management, Proposal Automation, Websites, Event Management, Webinars, Competitive Intelligence, Marketing Analytics, and Social Media. We can't draw too many conclusions from our first collection of data, but we'll review the methodology, the results and plans for benchmarking the legal marketing technology stack going forward.

You will learn:

- What tools firms are using
- What comprised a typical "marketing technology stack" in 2018
- Some surprises in the results
- Information about any topics we missed for the next survey
- The complete survey results, of which you will receive a copy



**Cheryl Disch**  
Senior Manager, Marketing Information Systems  
Duane Morris LLP

## 9:45 a.m. Overview of the Digital Marketing Stack

With the explosion of technologies for digital marketing, it is no wonder that marketers and marketing technologists feel a bit overwhelmed. From big data and the explosion of digital channels to marketing automation, AI and data visualization it is hard to keep track of all the components of today's digital marketing stack. This session will provide a framework for the day's discussions focusing on the major technologies in a marketer's tool belt. It will also address the technologies that are particularly useful for the legal industry. We will touch on the major technologies for (a) marketing & advertising, and (b) experiences and click streams. We will discuss how these come together in through (c) back office integration, and how (d) analysis and activation can show us what is effective and how we can continually improve.

You will learn:

- The key elements of the digital marketing stack
- How the elements of the stack interrelate
- How to apply elements of the stack at their firm to more effectively market



**Adam L. Stock**  
Chief Information Officer  
Allen Matkins

## 10:45 a.m. Networking and Refreshment Break

## 11:00 a.m. The Quest for the Holy Grail of CRM — Are We Getting Close?

They say that legends have a basis in reality. Is that the case with CRM? Is there an elusive special thing — an app, an approach, a policy — that will make everything better?

Let's evaluate how the combination of firms and solution providers are approaching the question, redefining the quest and making the myth a reality.

You will learn:

- What is changing in the evolving world of CRM
- How firms are supporting client service with technology
- How firms are approaching the client service tech ecosystem holistically



**Jennifer Klyse**  
Owner and Principal  
Klyse Advisory Group LLC

## 11:45 a.m. Data Visualization

The current competitive marketplace necessitates a no-nonsense, data-driven approach to tracking and reporting. But how do you identify the key performance indicators (KPIs) for each marketing initiative to satisfy firm leadership? And how do you optimize your processes for maximum ROI on your marketing budget? In this interactive session, participants will compare the KPIs that are most important to their firms. They will then present a collaborative "dashboard" that provides a visual representation of what they would report to firm leadership about key objectives.

You will learn:

- How to best track all your platforms more seamlessly (social media, web traffic, RFP win rates, inbound referrals, etc.)
- The best practices and reporting platforms used at other firms to capture and communicate marketing success
- How to reduce the amount of time you spend in laborious spreadsheets by applying the latest KPI theory and reporting technologies



**David Ackert**  
President  
Ackert Inc.

## 12:30 p.m. Networking Lunch

## 1:30 p.m. Law Firm Mobile Apps: The Good, the Bad and How to Make Yours Great!

First, learn what legal marketing and business development teams are doing with mobile apps including what does and doesn't work. Second, learn how to plan and build a mobile app that can be used to engage clients, promote the firm and generate leads.

You will learn:

- What other firms are using mobile apps for
- What makes a good and bad app
- How to plan a mobile app
- How to produce a mobile app
- How to generate leads from mobile apps



**Ian Broom**  
Chief Executive Officer  
Fliplet

## 2:30 p.m. Open to Everyone: The Business Case for Law Firm Web Accessibility

In our digital world, the internet is an essential forum for connection: but what if your law firm's website isn't accessible to people with impaired vision or hearing, or other disabilities?

Nearly one in five people in America have a disability, according to the U.S. Census Bureau. In this seminar, we will provide an overview of web accessibility, share key principles of accessible design and discuss the legal and reputational risks that come from failing to meet standards. We will also consider the strong business case to be made for web accessibility — from user-centric design to SEO advantages — and identify why this should be a priority for your firm in 2019.

You will learn:

- What web accessibility is
- How to understand WCAG-accessible content
- How to check if your firm's website is accessible
- The legal risks of failing to meet ADA standards
- How an accessible website can improve your firm's digital marketing, brand and bottom line



**Lynn Foley**  
Partner  
fsquared Marketing

## 3:30 p.m. Networking and Refreshment Break

## 3:45 p.m. SEO 2020: Building Your Strategy for On-SERP SEO and Beyond

Every year, reports are published stating that Google is shifting more to on-SERP SEO, or publishing content for searchers right on the search engine results page (SERP).

In this session, Diane Kulseth from Siteimprove will help you focus on three core tenets of your SEO strategy to fight against any drops in traffic coming from SEO, such as:

- Keyword intent, what it is and why it matters
- Looking to the SERPs for content direction
- Strengthening your content with structured data markup and other technical optimizations

This intermediate-level session will provide a high-level SEO overview for marketers new to SEO and help attendees walk away with clear takeaways for their firm to reinforce their efforts for the future.



**Diane Kulseth**  
SEO Consultant  
Siteimprove

## 4:30 p.m. Wrap-Up Panel and Final Q&A

Submit questions during the course of the day using flip charts around the room. To round out the program, the day's panelists will respond to any unanswered questions.

## 5:00 p.m. Program Conclusion





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# Developing a Roadmap for Deliberate Diversity and Informed Inclusion

Diversity and inclusion (D&I) continues to be a hot topic in the legal industry – all you have to do is read the latest headlines: “170 GCs Pen Open Letter to Law Firms: Improve on Diversity or Lose Our Business,” “A Black Partner Responds to GCs on Law Firm Diversity,” and “Partnership Classes Are Shrinking, Hampering Advancement and Diversity,” to name a few. Despite all the media coverage and at nauseum conversions, many legal marketers and business developers struggle in figuring out how to start the conversation at our firms, or we have “hit the wall” in our current efforts.

This half-day program is designed to address D&I topics in a format that allows for hearing perspectives from your fellow LMA colleagues and shared problem-solving using design thinking. Through breakout sessions and facilitated group debriefs, attendees will walk away with best practices, new ideas, and tactics to begin and accelerate D&I efforts within their respective firms.

## 1:00 p.m. Co-Chairs’ Opening Remarks and Town Hall

In this fast-paced Town Hall-style session, you’ll deepen your awareness of the need for D&I and be empowered and equipped to build and support diverse and inclusive firm teams, programs and successful initiatives. You’ll also hear from your LMA peers in the room about their continued successes and challenges as they approach the D&I issues at their own firms and provide critical “group think” feedback to increase the success of D&I within the entire legal community.

### Workshop Co-Chairs:

 **José Cunningham**  
Chief Marketing and  
Business Development Officer

 **Rafeedah A. Keys**  
Senior Marketing Manager  
Perkins Coie LLP

### Presenters:

 **Holly Barocio**  
Principal Consultant  
GrowthPlay

 **Doneene K. Damon**  
Current Executive Vice President  
and President-Elect  
Richards Layton & Finger PA

## 1:30 p.m. Champion Story

Everyone has a “champion story” to tell – either in their professional, personal or community lives. However, what many are missing is the heightened level of impact that they could – until now. Doneene Damon, President-Elect of Richards, Layton & Finger will share with us her story of successes and frustrations, discuss with us what’s next on her journey, and offer practical advice for you to follow and share with others as they start, or continue, their own journey.

## 2:15 p.m. Design Thinking

When tackling an issue as complex as D&I, we need an approach that focuses on possibility rather than limitations; spurs creativity rather than relying on what has worked in the past; and allows for quick failure to continuously generate new ideas. It’s also important to remember that Design Thinking isn’t the final destination and it’s not always a linear process.

Participants will learn and apply the 5-steps of Design Thinking to help provide potential solutions to the above diversity and inclusions issues as well as the issues they are facing at their respective firms.

## 3:00 p.m. Break

## 3:15 p.m. Facilitated Group Breakouts

There are many complex problems looming with D&I initiatives that your team members just want to get better at handling. We will break into smaller groups with the goal of addressing these issues and leaving with new strategies designed to counter the current issue preventing or hindering your team’s progress. Issues to be addressed include:

- Building the case for a D&I program at your firm
- How to foster an inclusive environment
- Tying D&I to revenue generation
- Combating “tokenism” and addressing D&I fatigue
- Diversity metrics or taking a data-driven approach to D&I
- How to start affinity and resource groups within your firms

## 4:00 p.m. Group Report-Backs

Together, each group will present their problem and practical solutions to the entire audience.

## 4:45 p.m. Wrap Up and Final Q&A

## 5:00 p.m. Program Concludes



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# Is CRM driving you CRAZY

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CRM Therapy – The (Juris) Doctor Is In:  
Client CRM Confessions

Wednesday, April 10 at 2:45 p.m.

Please also join Chris Fritsch and the CLIENTSFirst  
Team at LMA Booth #225 for some CRM Therapy,  
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## Applying Design Thinking Principles to Create Change

The legal market is consolidating and facing fierce competition from both within and outside of the profession. And, law firms are facing unprecedented demands from clients to innovate not only the legal solutions they are providing, but also how they are providing them.

Law firm executives are expected to solve these "business of law" problems, but must do so while operating within slow-moving, consensus-building organizations. One tool you can use to better effect change is to engage stakeholders in the design thinking process to expedite consensus, build momentum and, ultimately, produce better solutions.

Professor Scott A. Westfahl and Anusia Gillespie will teach design thinking through a highly interactive lecture. They will follow it with a team-based simulation where teams will use brainstorming, innovation, exaptation and other techniques to generate and detail solutions to the issues presented. And, they will use additional tools to assess feasibility of execution.

You will learn:

- Research relating to disruption and innovation facing the global legal profession
- Motivational forces that drive professionals within law firms and how to leverage the psychology of motivation and influence for positive impact
- Principles of design thinking
- How to apply design thinking and creativity principles to gain a hands-on understanding of their application in legal marketing



**Anusia Gillespie**  
*Director of Innovation*  
**Eversheds Sutherland (US) LLP**



**Scott A. Westfahl**  
*Professor of Practice and Faculty Director, Harvard Law School Executive Education*  
**Harvard Law School**

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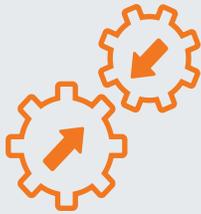


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# Conference Networking Opportunities

## Embrace the community spirit among legal marketers!

The conference offers a range of facilitated networking events that will give you plenty of opportunities to meet your peers, make new connections and share ideas that will help shape the future of the changing industry.



Monday, April 8, from 4:00 – 5:00 p.m.

### CMO SIG Reception

» International Tower, Ballroom North

CMO Summit participants and members of the LMA CMO Shared Interest Group (SIG) are invited to attend this cocktail reception. Not a member of the CMO SIG? If you are an in-house first chair marketing and/or business development director and would like to learn more about becoming a member of the CMO SIG, you're welcome to attend.



Monday, April 8, from 4:45 – 5:00 p.m.

### Conference Mentoring Program Meet Up

» Centennial Foyer (Ballroom Level)

A hub for conference mentor/mentee pairings to meet face-to-face before heading to the First-Timers' Reception.



Monday, April 8, from 5:00 – 6:00 p.m.

### First-Timers' Reception

» Pool Deck (Ballroom Level)

The First-Timers' Reception welcomes those who have not attended an LMA Annual Conference before. It's an opportunity to meet other first-time attendees and to become acquainted with key members of LMA leadership. Featuring a fun ice-breaker game, you can also win a prize!



Monday, April 8, from 5:00 – 6:00 p.m.

### Exhibit Hall Sneak Peek

» Grand Hall (Exhibit Level)

This sneak peek is an opportunity for an early review of the exhibitors. Use the event app to pre-schedule one-on-one meetings with specific exhibitors of interest.



Monday, April 8, from 6:00 – 7:30 p.m.

### Exhibit Hall Welcome Reception

» Grand Hall (Exhibit Level)

The exhibit hall opens in full force with the Welcome Reception. Mingle with your colleagues and get to know the exhibitors while enjoying drinks and appetizers. The Welcome Reception is a fantastic opportunity to learn about the latest legal marketing products, services and technologies and to show support for the 2019 LMA Annual Conference sponsors and exhibitors.



Tuesday, April 9, from 12:15 – 1:30 p.m.

### Shared Interest Group (SIG) Meetings

» Centennial I-III (Ballroom Level)

During lunch, tables will be reserved for each SIG. Take advantage of the opportunity to network with your SIG colleagues. If you aren't a member of a SIG yet, join a table and learn how to connect year-round with these experts.

For more information on LMA's SIGs, visit [www.legalmarketing.org/SIGs](http://www.legalmarketing.org/SIGs)



Tuesday, April 9, from 6:30 – 8:00 p.m.

### Skyline Park at Ponce City Market Networking Reception

After a busy day of conference programming, all conference attendees are invited to experience an iconic Atlanta destination, The Roof at Ponce City Market. Enjoy panoramic views, an 18-hole mini golf course and boardwalk-style games, while networking with your legal marketing colleagues. Transportation from the Hyatt Regency Atlanta will be provided.



Wednesday, April 10, from 10:45 – 11:15 a.m.

### Networking for Prizes Drawing

» Grand Hall (Exhibit Level)

Networking for Prizes is a great opportunity to network with industry leaders and learn about the latest products and services for legal marketers. Play along during the course of the conference for a chance to win some great prizes from our sponsors and exhibitors.



Monday, April 8, from 7:30 – 8:30 p.m.

### Regional Receptions

Your time in Atlanta can also be an opportunity to connect and catch-up with your local legal marketing community.

#### Eastern and Western Canada Regions

7:30 – 9:00 p.m.  
Max Lagers  
(320 Peachtree St.)

#### Northeast Region

7:30 – 8:30 p.m.  
White Oak Kitchen  
(270 Peachtree St.)

#### Southwest Region

7:30 – 8:30 p.m.  
The Braves All Star Grill  
(200 Peachtree St.)

Wednesday, April 10, from 12:15 – 1:30 p.m.

### Regional Meet Ups

» Centennial I-III (Ballroom Level)

During lunch, tables will be reserved for each of LMA's Regions. Take advantage of the opportunity to network with your regional colleagues. If you aren't a member of LMA yet, join a table for your geographic location to meet legal marketers in your local area.



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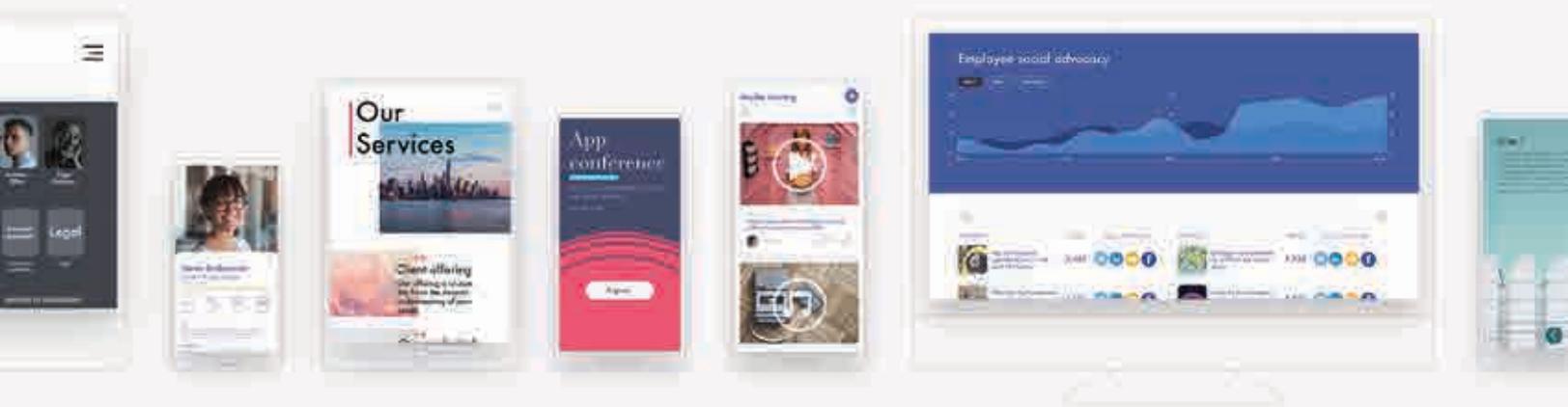
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8:00 a.m.  
General Session Doors Open

8:30 – 8:45 a.m.  
Welcome and Opening Remarks

2019 LMA President  
 **Cynthia P. Voth**  
*Director of Client Engagement  
and Innovation*  
**Miller Nash Graham  
& Dunn LLP**

2019 Conference Co-Chairs  
 **Andrew Laver**  
*Business Development Manager*  
**Buchanan Ingersoll  
& Rooney PC**

 **Erin Meszaros**  
*Chief Business Development  
and Client Service Officer*  
**Eversheds Sutherland (US) LLP**

Spotlight  
Session

8:45 – 9:30 a.m.  
**Is ABA Rule 5.4 Keeping Nonlawyer Competitors Out, or Lawyers in?**

The primary mechanism for regulating lawyers is a system of ethics rules based on the ABA Model Rules of Professional Conduct. This includes Model Rule 5.4, which reflects the legal profession's longstanding prohibition on lawyers sharing equity interest with "nonlawyers" in any business engaged in the practice of law. Although the policy rationale for Rule 5.4 is the need to preserve lawyer independence, the prohibition also carries the cost of limiting the amount and quality of collaboration between lawyers and allied professionals when making business decisions, which affects the bottom line. As a result, traditional law firms find themselves in the vulnerable position of trailing NewLaw, legaltech and in-house legal in the development and implementation of innovations that can deliver value to clients. Other common law jurisdictions, including England and Australia, have already lifted the prohibition on nonlawyer ownership. Is it time for the United States to follow suit? The State Bar of California recently created a taskforce to study this question. Join this session to learn what that could mean for your organization and your career.

 **William D. Henderson**  
*Professor of Law*  
**Indiana University Maurer School of Law**

 **Scott A. Westfahl**  
*Professor of Practice and Faculty Director, Harvard Law School Executive Education*  
**Harvard Law School**

Keynote  
Presentation

9:30 – 10:30 a.m.  
**We Can All Be Movement Starters**

Though they may seem diametrically opposed in their missions and methods, the best leaders in both business and social change share one crucial trait: They lead movements. Drawing on stories of leaders from both the business and activism worlds, Jennifer Dulski walks through the common steps all successful movement starters take from creating a clear and compelling vision, to mobilizing people around that vision, navigating criticism and effectively persuading decision makers.

She also shares tips for business leaders on how to respond to pressure from changemakers — whether it be your customer base or the general public. Using real case studies, she shows how companies who want to lead are responsive to and engage with their stakeholders.

 **Jennifer Dulski**  
*Head of Groups and Community*  
**Facebook**

**About Jennifer:** Jennifer Dulski is the author of Wall Street Journal bestseller *Purposeful: Are You a Manager or a Movement Starter?* about how each of us can be movement starters. She leads Facebook Groups — a product used by more than 1.4 billion people to create and engage in communities that matter to them on topics from parenting to health to disaster response. Prior to Facebook, Jennifer was president & COO of Change.org. She was also an early Yahoo! employee and led one of six business units there as group VP and GM of Local and Marketplaces. In 2007, Jennifer left Yahoo! to become CEO of The Dealmap, a mobile, local deals site that Google acquired in 2011, making Jennifer the first female entrepreneur to sell a company to Google, where she then led Google Shopping and Product Listing Ads. A prominent thought leader in Silicon Valley, she writes frequently about management and leadership for LinkedIn Influencers, Forbes, Fortune and Huffington Post.

10:30 – 11:15 a.m.  
**Networking Break  
in the Exhibit Hall**

# Concurrent Breakout Sessions

## BREAKOUT ONE A LMA's Next Big Thing: Service Metamorphosis – Driving Performance Improvement

"Service" has been talked about for more than 30 years. And, if we are honest, our profession should receive an "F" for its efforts. The law firm's historic culture and structure make measurable, firmwide improvement slow at best and impossible at worst.

Hear from two CMOs whose law firms are well on their way on the service continuum, plus strategies and tactics to help law firms of any size. There are four stages of performance (and you can start where your firm is) similar to the metamorphosis of the egg into the butterfly. These correspond to the objectives for this session. You will learn:

Stage One – Egg: Learn how to design a new beginning in the client/lawyer relationship, which easily scales to the size of the firm.

Stage Two – Caterpillar: Learn how to identify the action that needs to be designed by the law firm. Learn how to hold conversations that uncover the relationship strategy and the "how" elements that will drive performance improvement.

Stage Three – Chrysalis: Learn how to set a clear vision of the desired relationship and performance improvement goals. Lawyers are accountable for measurable outcomes and ensuring that the needle is moving.

Stage Four – Adult: Learn what it looks like when clients and lawyers are thriving together.

-  **Melanie S. Green**  
Chief Client Development Officer  
**Faegre Baker Daniels LLP**
-  **Terra M. Liddell**  
Chief Marketing Officer  
**Finnegan, Henderson, Farabow, Garrett & Dunner, LLP**
-  **Deborah McMurray**  
Chief Executive Officer and Strategy Architect  
**Content Pilot LLC**
-  **Douglas B. Tumminello**  
Partner  
**Lewis Roca Rothgerber Christie LLP**

## BREAKOUT TWO A Legal Operations and Legal Marketing: Collaborating for Success

You will learn:

- How legal marketers can get to know and work with legal ops experts at their clients' companies
- What the objectives (and challenges) of the legal ops experts are and how you can help
- What role CLOC plays in shaping how legal operations departments face the future

-  **Lisa Brzycki**  
Senior Director, Legal Strategy,  
Technology and Operations  
**Northwestern Mutual**
-  **Laura A. Dieudonné**  
General Manager of Legal Operations  
and Administration  
**Delta Air Lines**
-  **Jamal Stockton**  
Head of Legal Innovation and Digital Enablement  
**Fidelity Investments**

## BREAKOUT THREE A The Practical Implications of Change to ABA Rule 5.4, the 'Non-Lawyer' Ownership Rules

In the conference opening, William D. Henderson and Scott A. Westfahl set forth the landscape surrounding liberalization of ABA Rule 5.4. You may have come away from this landscape report with more questions than answers on how to prepare your firm for reform. Join Professor Westfahl for a facilitated discussion on what law firm leaders need to think about to strategically develop and prepare their contingency plans, including the practical implications of reform across the legal organization.

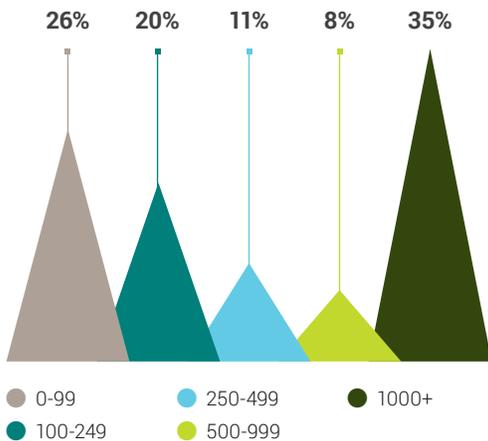
You will learn:

- How to set expectations on the time frame and evolution of reform
- What can be learned from the Legal Services Act 2007 in the United Kingdom, a case of similar reform
- How to think about your firm's changing talent strategy, and how to "right-skill" for your future workforce
- How to manage the change to the professional identities of lawyers and allied professionals, a massive undertaking

-  **Scott A. Westfahl**  
Professor of Practice and Faculty Director,  
Harvard Law School Executive Education  
**Harvard Law School**

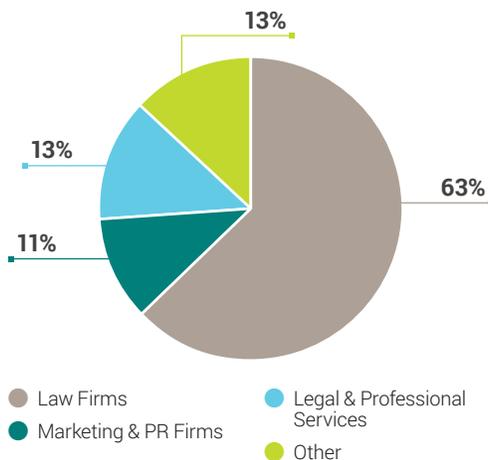
## 2019 Attendee Demographics\*

Attendees by Firm Size\*\*

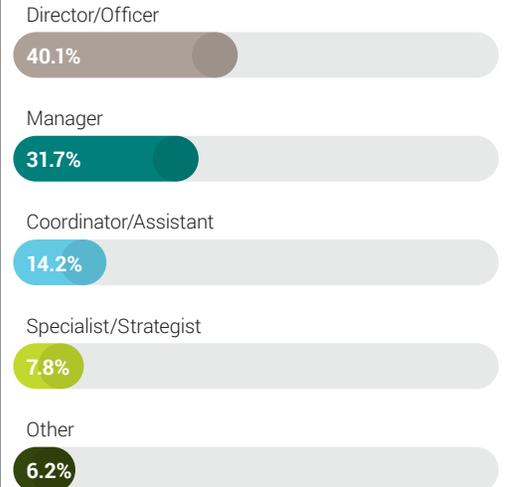


\*\*by number of lawyers

Attendees by Industry



Law Firm Attendees by Title



\*Initial 2019 LMA Annual Conference attendee breakdowns. Final details will be posted on [www.LMAconference.com](http://www.LMAconference.com) in the months following the event.

## Concurrent Breakout Sessions



### BREAKOUT FOUR E

#### Diversity From the Client Perspective: Smart Strategies to Winning Business

Join a discussion on diversity from the client perspective. You will examine how to support client demands for Diversity and Inclusion (D&I) through strategic programs and partnerships and targeted marketing and business development efforts. The session will cover client surveys and reports, using data to drive D&I decisions and efforts, D&I-focused marketing and business development strategies, partnering with clients on D&I initiatives, and inclusive leadership and cultures.

You will learn:

- The role clients play in D&I efforts
- How D&I intersects with marketing and business development (e.g., RFPs, pitches, brochures, websites)
- How to use data to support, drive and enhance your D&I efforts
- The difference between having diversity and being inclusive
- The traits and characteristics of an inclusive leader



**Lia Dorsey**  
*US Diversity & Inclusion Director*  
**Dentons US LLP**



**Barbara Miller**  
*Vice President and Associate General Counsel*  
**Federal Home Loan Bank of Atlanta**



**Candace N. Rodriguez**  
*Associate General Counsel*  
**The Home Depot**



### BREAKOUT FIVE E

#### Building Your Proposal Technology Blueprint

Does your firm really need a proposal automation tool? Hear several different perspectives on how to determine whether a proposal technology tool or system would enhance or diminish your firm's proposal processes, resources and budget. This session is for you if you are a firm proposal decision-maker/influencer ready to take an honest inventory of your current state of business affairs. Walk away with an actionable blueprint to help you determine the right technology tools/systems to address your needs.

You will learn:

- Varying components of the proposal process and the impact on the technology needed
- Team priorities and insufficiencies (if any) to create a successful proposal process and system
- How to help firm leaders create a blueprint for choosing the right technology tool(s) to manage the proposal process



**Denice Jayaram**  
*Business Development Manager*  
**Stinson Leonard Street LLP**



**Vanessa Petrea**  
*Senior Manager, Business Development*  
**Pillsbury Winthrop Shaw Pittman LLP**



**Tracey (Serber) Silver**  
*Pitches and Pursuits Manager*  
**Hogan Lovells**



**Ger Thor**  
*Global Pitch Infrastructure Manager*  
**Hogan Lovells**



### BREAKOUT SIX E

#### David vs. Goliath: The Competitive World of Plaintiff Firm Marketing

The plaintiff law firm experience is unique. It is highly rewarding to successfully represent the underdog in a battle with giant corporations. In an immensely competitive legal environment, the job of the plaintiff law firm marketer is daunting because of an over-saturation of lawyers, a plethora of information to learn about, few trusted resources and an evolving marketplace that has switched its emphasis from referrals to direct-to-consumer.

This panel of in-house and external legal marketing advisors will demystify the evolving role of the legal marketer in a plaintiff law firm. This session offers real-world experiences, tips, tools and tactics for growing your client base and measuring your results to prepare you to tackle the challenges of today and tomorrow.

You will learn:

- How to understand your firm's unique value proposition
- Research growth markets for your firm
- Select tactics that can be quickly implemented
- How to strategically use digital marketing to attract leads
- How to speak to multiple markets without diluting the message
- How to create the most effective intake process for your firm
- Tools to prove return on investment



**Adrian Dayton**  
*Founder*  
**ClearView Social Inc.**



**Pamela Foster**  
*Director of Marketing and Business Development*  
**Howie Sacks & Henry LLP**



**Danelsy C. Medrano**  
*Director of Marketing*  
**Feldman Shepherd Wohlgelemer Tanner Weinstock Dodig LLP**



**Erin Watson**  
*Director of Communications and Marketing*  
**Motley Rice LLC**

12:15 – 1:30 p.m.

### Networking Lunch

Sponsored By:



During lunch, tables will be reserved for each of shared interest groups (SIGs). Take advantage of the opportunity to network with your SIG colleagues, or, if you aren't a member of a SIG yet and would like to be, join a table to learn more.

For information on LMA's SIGs, visit [www.legalmarketing.org/SIGs](http://www.legalmarketing.org/SIGs)

### Breakout Key



Business Development



Business of Law



Client Services



Communications



Marketing Management and Leadership



Technology Management

### Competency Level



Advanced



Essential



## Concurrent Breakout Sessions

### **BREAKOUT ONE A** From PSO to PSB: A New Model for Creating Differentiated Brand Experiences

Unlike B2B or B2C peers, Professional Services Organizations have a host of hurdles to overcome to successfully present a clear and cohesive brand story in a unique fashion. All too often, marketers find themselves stuck between building the firm brand or building lawyers' brands. This session will examine how the use of an umbrella brand and supporting practice area marketing can help drive an integrated and powerful experience. They will use real examples to show how firms are using this approach to guide their content, thought leadership, events and digital strategies. The end result is a differentiated and memorable brand experience at every touch point.

You will learn:

- A new Professional Services Brand Model
- How to implement in a practical and achievable fashion
- How practices areas, lawyers and marketers can embrace the framework
- Real-world examples of firms that have embraced this new model and the resulting brand touchpoints



**Kaleb Peek**  
Managing Director, Chief Strategist  
One North



**Ryan Schulz**  
Managing Director, Experience Design  
One North

### **BREAKOUT FOUR E** Crazy, Rich Collaboration – Notes From the Field on How to Get IT and Firm Leadership Onboard

We tend to over complicate it, but collaboration is simply the act of working with someone to produce or create. We collaborate in many aspects of our lives but when it comes to finding the best approach to fostering collaboration across marketing, IT and firm leadership, we often fall short.

Whether your next project is a large-scale initiative or a specific campaign, you – and your firm – will be more successful if everyone works cohesively. As a marketing leader, though, driving collaboration also provides a platform for you to lead with the voice of the market and help the firm succeed against evolved client expectations.

This session will offer a needs assessment for three key stakeholder groups to provide insight on how to best collaborate. These needs will come to life against a backdrop of real-life examples drawn from Mary's extensive background working with a wide range of firms. Finally, a sample collaboration plan will arm you with a starting point for achieving crazy, rich collaboration that improves engagement both inside and outside of your firm.



**Mary J. Olson**  
Client Advisor, InterAction  
LexisNexis

### **BREAKOUT TWO E** Alternative Legal Service Providers (ALSPs) Are No Longer Alternative

The rise of the alternative legal service providers (ALSPs) has been swift and impactful in the past two decades, and legitimized by acquisitions and expansion of legal industry market share. Though they grew out of repeatable, mundane tasks for law firm back offices and high-volume document production work, they are now established as a credible player in legal services and often a direct competitor to law firms. They have steadily gained traction with corporate legal departments and become enablers for big law firms to deliver more cost-effective services to their enterprise clients. They continue to move up the value chain, adding consulting service, legal technology and extensive managed services. This session will review the ways in which ALSPs play a critical role in the legal ecosystem and the ways in which they are winning the game of service delivery.

You will learn:

- Areas of work ripe for ALSPs services
- The benefits of ALSP as a service provider
- How law firms can use ALSPs to reduce costs to their clients
- How to prepare to compete with ALSPs for corporate legal department work
- How a managed service can work for corporate clients



**Mark Ross**  
Executive Vice President and Global Head  
Contracts, Compliance and Commercial  
Integreon



**Heather Suttie**  
Legal Marketing and  
Business Development Consulting  
Heather Suttie & Associates



**Stuart Wood**  
Chief Executive Officer  
Caravel Law

### **BREAKOUT FIVE A** How to Turn CRM Into an Insights Engine

In this session, you will hear how leading law firms found ways to make their sales and marketing technology work for their firms. This session will explore successful strategies implemented to drive CRM user adoption and innovation across a law firm.

Whether your firm currently stores contact information in various spreadsheets or uses a customer relationship management (CRM) system, you will discover effective strategies to grow your law firm with relationship intelligence and CRM automation.

You will learn:

- How to form an action plan from the insights uncovered to improve user adoption of CRM in your firm
- How these firms discovered hidden relationships among their colleagues and clients or prospects, and how they utilized that information to enhance team business development and cross selling
- How to adopt the same strategies these senior leaders leverage to turn your firm's CRM system into an insights engine



**Nanette Matys**  
Chief Client Officer  
Smart & Biggar/Fetherstonhaugh



**Joe Przybyla**  
Director  
Introhive



**Jennifer Schreck**  
Director of Client Intelligence  
Reed Smith LLP



**Milosz Skrzypczak**  
Director, Market & Competitive Intelligence,  
Client Development  
Osler, Hoskin & Harcourt LLP

### **BREAKOUT THREE A** Serve Clients While You Sleep

Did you ever notice that you generally cannot go to a law firm's website and buy anything? That's because law firms sell full-service legal solutions all the time. Their products are their people. Law firms do not offer self-service.

The challenge for clients is that full-service legal services are perfectly appropriate for sticky-wicket and strategic matters, but often ill-suited for business-as-usual transactions and needs. Clients complain about cost and speed, and law firms have few options to satisfy the demand outside of working harder for less money.

Artificial intelligence (AI) offers a way out. In this session, you will learn how some law firms are now offering self-service and partial-service legal solutions with the help of client-facing, firm-branded legal software, empowered by AI. Clients subscribe to self-service software from the law firm when they need quick, affordable help. They use partial-service and full-service when they need more help. Law firms enhance their revenues and margins, and serve clients while they sleep.

You will learn:

- How a lawyer plus an algorithm is stronger than either by itself
- How to serve your clients 24x7x365
- How self-service subscription software will not cannibalize your full-service, bespoke, billable-hour work



**Kevin L. Miller**  
Chief Executive Officer  
LegalSifter Inc.



**A. Elizabeth (Lizz) Patrick**  
Chief Client Officer & Founder  
Patrick Law Group

### **BREAKOUT SIX E** Strategies for Launching and Measuring the Impact of Your Law Firm Alumni Program

Your law firm makes significant investments in its lawyers while they are at the firm and invests in their afterlives through an alumni program. Engendering goodwill is important, but developing opportunities that increase firm revenue is key and an important justification for your firm's investment. Hear from alumni relations professionals who will share strategies for creating an alumni program at your firm and measuring and reporting on that investment.

You will learn:

- How to develop BD opportunities from a law firm alumni program
- Reporting on return on investment
- How to collaborate effectively with other departments



**Graziella Reis-Trani**  
Alumni Program Manager  
White & Case LLP



**Amanda Stipe**  
Global Alumni Relations Manager  
Latham & Watkins LLP

2:30 – 3:15 p.m.

### Networking and Refreshment Break in the Exhibit Hall



## Concurrent Breakout Sessions



### BREAKOUT ONE **A** Power Your Firm's Growth by Adopting a Key Client Strategy

Who knows how you'll be selling legal services a year from today? Your top clients do. They're demanding different engagement with their law firms. They want to develop deep relationships with firms that understand their strategies, serve as trusted advisors, and proactively provide breadth of expertise that helps support their initiatives. Aligning to your key clients' needs and objectives holds the key for real and sustained firm and practice growth.

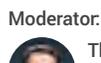
Our panel of legal, financial services, and technology executives will reveal how law firms use key client programs to better collaborate and expand client relationships on a global scale. You'll learn an approach to driving practice area growth — in some cases, by more than 200% — that focuses on a select client list and recasts business development as a "farming" rather than a "hunting" discipline. Whether you're from a mid-sized or large firm, you'll learn how you can move your business forward through a practical discussion with one of the world's best firms.

You'll learn best practices in:

- Navigating changing client expectations and law firm selection preferences
- Collaborating to expand client relationships across practice areas
- Managing key client initiatives complicated by lateral hire and merger growth strategies



**Neale Fisher**  
Managing Director  
Croft & Bender



**Thad Jampol**  
Chief Product Officer  
Intapp



**Kelby Luther**  
Associate  
Director of Client Development  
Baker McKenzie



### BREAKOUT FOUR **A** Whither the Bellwethers? How Current Legal Market Economics Will Impact Your Firm

Following several years of flat growth, the legal market has begun to show noteworthy signs of financial health, and, for many law firms, a return to growth. Will the growth last? Are you, like many marketing and business development leaders, expected to be more versed in the industry economics affecting law firms? Following the release of the State of the Legal Market Report (January 2019) by the Georgetown Center for the Study of the Legal Profession and Legal Executive Institute/Peer Monitor, this session will continue that study to explore the factors that are impacting firms and how these insights are being leveraged to produce winning strategies. Beginning with a brief update on the most current financial performance figures, we will turn for reaction and predictions from a distinguished panel of industry thought leaders.

You will learn:

- Learn the most current law firm financial trends (data through February 2019)
- Gain a better understanding of the competitive forces in the marketplace
- Hear from industry leaders on their reaction to the data and what they see as most important for their firms, businesses, and the industry
- Learn how firms are applying market trends to guide their strategic decision-making
- Be able to better answer the question: What will 2019 hold?



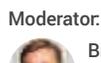
**Silvia L. Coulter**  
Principal  
LawVision Group LLC



**Greg Negus**  
Chief Operating Officer  
Ogletree, Deakins, Nash, Smoak & Stewart, P.C.



**Dwight Floyd**  
Director of Pricing and Value  
Eversheds Sutherland (US) LLP



**Brent Turner**  
Manager,  
Peer Monitor  
Thomson Reuters



**Evan Glover**  
Law Vice President  
NCR Corporation



### BREAKOUT TWO **A** How to Use the Right Data, Right. Validate Initiatives, Create Transparency and Engage Your Fee Earners

Firms are wrestling with an increasing need to put more structure around how they manage their clients while fee earners often have little experience of doing so. Using data in the right way can help firms with this cultural change and doesn't have to be complex to be highly effective. In some cases, it's as simple as connecting existing dots with the right set of reports. In others, capturing new data points can deliver insight that transforms how a firm evaluates the success of its business development initiatives.

We'll explore examples of how marketing and business development teams in different firms have become fluent in their data to validate initiatives, create transparency and engage their fee earners.

You will learn:

- How capturing and analyzing the right opportunity data can provide hard facts on BD initiatives and get the partnership engaged
- How providing access to meaningful insight to fee earners can have a big impact, including on the bottom line
- Brief outlook: what can law firms do today to get their data ready for AI in BD tomorrow



**Robyn Addis**  
Director of Marketing  
Ballard Spahr LLP



**Brian Conway**  
Head of Business Development and Marketing Operations  
McDermott Will & Emery LLP



**Andrew Hutchinson**  
Vice President of Sales and Marketing, Americas  
OnePlace



### BREAKOUT FIVE **A** Making It or Faking It? Effective Industry Sector Strategy Workshop

Having a sector focus has become all the rage. Today, 118 of Am Law's top 200 firms claim to have a sector focus. But, in reality, there are more "fakers" than "makers."

Through a case study, you will evaluate sector effectiveness, identify opportunities and develop a plan to create an authentic sector focus and institute a real competitive edge. You will leave this session with a new and enlightened perspective on what goes into building a credible sector strategy, the measurable benefits it delivers to clients and what it actually takes to make it work in the real world.

You will learn:

- Through a dynamic activity, how to think differently about your next wave of marketing
- The differences between identifying sector as a label and sector as a strategy
- The critical aspects of an effective sector strategy and how to drive performance on each
- Extra networking opportunity: Enjoy getting to know and working with peers, instead of sitting beside them wondering how to introduce yourself



**Elizabeth Duffy**  
Vice President  
Acritas US Inc.



**Gillian Ward**  
Chief Marketing Officer  
Baker Botts LLP

3:15 – 5:15 p.m.

DEEP DIVE



### BREAKOUT THREE **A** Driving Growth: Building Your Ability to Lead the Lawyers to Bring in More Profitable Business

Business development (BD) is a craft that can be learned. Sadly, most lawyers aren't taught it. In this session, you will learn the core procedural elements lawyers need to know to bring in business. Then, you will examine how you can put yourself in the position of driving growth across your firm.

This session will use elements of a highly interactive training programs. You will do far more than learn important new skills — you will leave with a plan to jump-start your firm's growth and enhance your career. You will gain both large- and medium-sized firm perspectives on implementing these techniques.

You will learn:

- How to use the skills learned to elevate your status in the firm and enhance your career
- How lawyers can use behavioral science to *Manage Opportunities* to get to a "yes," to *Manage Relationships* to generate more referrals and "raving fans" and to *Manage Themselves* to stay on top of BD, even when they are busy
- How you can work with your lawyers to deploy these methods, assume the roles of BD strategist and accountability partner, and drive more growth for the firm



**Mo Bunnell**  
Founder and Chief Executive Officer  
Bunnell Idea Group



**Aleisha Gravit**  
Chief Marketing and Business Development Officer  
Akin Gump Strauss Hauer & Feld LLP



**Lindsay McReynolds**  
Chief Client Relations Officer  
Schwabe, Williamson & Wyatt PC



### BREAKOUT SIX **E** Keeping the Billing Tail From Wagging the Law Firm Dog

Hourly and non-hourly billing have powerful effects on firm structure and strategies. The remodeling process is virtually irresistible and imperceptible. This session will look at the theory of hourly and non-hourly billing and present a case study in which the speaker's firm (non-hourly) took over a major piece of litigation from another firm that had billed by the hour for a substantial period. In addition, you will hear other instances and examples from the speaker's experience and that of his firm. Learn how to recognize and understand the problems spawned by billing structures and enable responses that maximize the operation of the firm, both financially and in terms of client satisfaction.

You will learn:

- How the firm's predominant billing method inevitably sculpts its structure and strategy (Grand Canyon)
- The client service implications of billing model-induced staffing and operations
- How to anticipate and respond to billing model-induced dysfunction to maximize firm performance



**Lindley Brenza**  
Partner  
Bartlit Beck LLP



## Concurrent Breakout Sessions



### BREAKOUT ONE **E**

#### Like a Shark: How to Apply Intelligence and Killer Instincts to Dominate Marketing Technology

Today's marketers are confronted by a technology landscape that includes literally thousands of products, each addressing different needs. Marketers are becoming more technologically savvy. Yet, the proliferation of niche and one-size-fits-all solutions can make even the most sophisticated professional feel like a fish out of water.

You will learn:

- An overview of the marketing technology stack concept
- A survey of the abundant technologies available to marketers, legal and otherwise
- Actual solutions to selecting, adopting and scaling marketing technology
- Helpful insights into how to bring ideas and options to decision-makers at your firm



**Jaron Rubenstein**  
President  
RubyLaw



### BREAKOUT FOUR **A**

#### Streamlined, Actionable and Transparent Partner Business Plans

Is your annual partner business plan process a chore? Are you frustrated by the lawyers' lack of follow-through and implementation? In this case study, learn how one law firm leveraged an online platform to develop and implement lawyer business plans. Their solution provided partners with personalized business development "dashboards" that can be reviewed and updated throughout the year. It also delivered actionable reminders, tied to due dates, to promote execution. And, it provided transparency for business development activities across the firm. More than 75 percent of partners are using the tool and, within the first month, the firm could identify 15 successes and opportunities.

You will learn:

- How to implement a partner business plan process that drives sales activity
- How to leverage technology to drive accountability
- Key elements of a successful implementation and communication plan to introduce new business development technology



**Guy Adams**  
Chief Operating Officer  
ObjectiveManager



**Jill Weber**  
Chief Marketing and Business Development Officer  
Stinson Leonard Street LLP



5:15 – 5:45 p.m.

### End of Day One Wrap Up

This session is an opportunity to consider, solidify and share your biggest takeaways from day one with other conference participants. It also enables you to hear highlights from breakout sessions you aren't able to attend.

6:30 – 8:00 p.m.

### Networking Reception – The Roof at Ponce City Market

After a full day of educational programming and professional development, unwind and network with your fellow conference attendees at The Roof at Ponce City Market.

We invite you to experience what is quickly becoming an iconic Atlanta destination featuring panoramic views, boardwalk-style games, craft cocktails and so much more.

See p. 45 for details.



### BREAKOUT TWO **E**

#### Creating a Niche Market at Mid-Sized Firms

Hear from two in-house legal marketing professionals about the nuts and bolts of forming and growing a new niche market. Through a case study, you will walk through their experiences of forming the highly controversial, yet profitable, Cannabis and Controlled Substances Group at Lowndes and the early-adopter play of the Opportunity Zones Task Force at McNair. This session will cover how to obtain firm buy-in, clarify the roles and responsibilities of the lawyers and the marketers, research market trends while growing, manage media relations and crises, and determine ROI.

You will learn:

- A framework for forming a new practice
- Message planning best practices
- A checklist for measuring message effectiveness
- Tips on how to handle it all in-house



**Ioana Good**  
Senior Business Development  
and Communications Manager  
Lowndes, Drosdick, Doster, Kantor & Reed



**Kathryn Whitaker**  
Director of Marketing and Business Development  
McNair Law Firm PA



3:15 – 5:15 p.m.

### BREAKOUT FIVE CONT. **A**

#### Making It or Faking It? Effective Industry Sector Strategy Workshop

See session details on page 61.

DEEP DIVE



3:15 – 5:15 p.m.

### BREAKOUT THREE CONT. **A**

#### Driving Growth: Building Your Ability to Lead the Lawyers to Bring in More Profitable Business

See session details on page 61.



### BREAKOUT SIX **A**

#### Balancing on the Data Tightrope – Too Little on One Side and Too Much on the Other Means an Inevitable Fall

Data is at the heart of everything we do as marketing and business development professionals. Without adequate data our attempts to successfully focus our activities are likely to be based on nothing more than divination. The reality for most firms is that they have an odd balance of data. In some areas, there is a distinct lack of useful data, in others there is a positive avalanche of data – so much, in fact, that it is difficult to make sense of.

In large firms, who have invested in sophisticated tools and services, the balance may swing towards too much data, in smaller firms the balance might swing towards too little data. The important thing is that both are out of balance.

This session will highlight the ways in which developments in technology, and increased connectivity between systems, can help redress this balance. More importantly, these advancements bring such a world into the reach of law firms of all sizes without the need to break the bank to do it.



**Simon Elven**  
Commercial and Marketing Director  
Tikit Ltd

### Breakout Key



Business Development



Business of Law



Client Services



Communications



Marketing Management and Leadership



Technology Management

### Competency Level



Advanced



Essential

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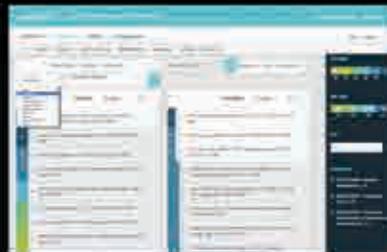
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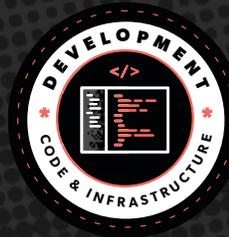
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User  
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Services



Development



Digital  
Marketing

## Meet our team

**Katie Desmond**  
Partner, CBDO

**Jay Antonucci**  
New Business Manager

**Thomas Saraceno**  
Director of Experience

**Maribeth Fitzpatrick**  
Lead UX Engineer

**Jeff Turcotte**  
Director of Engineering



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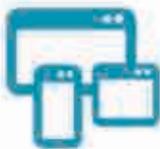
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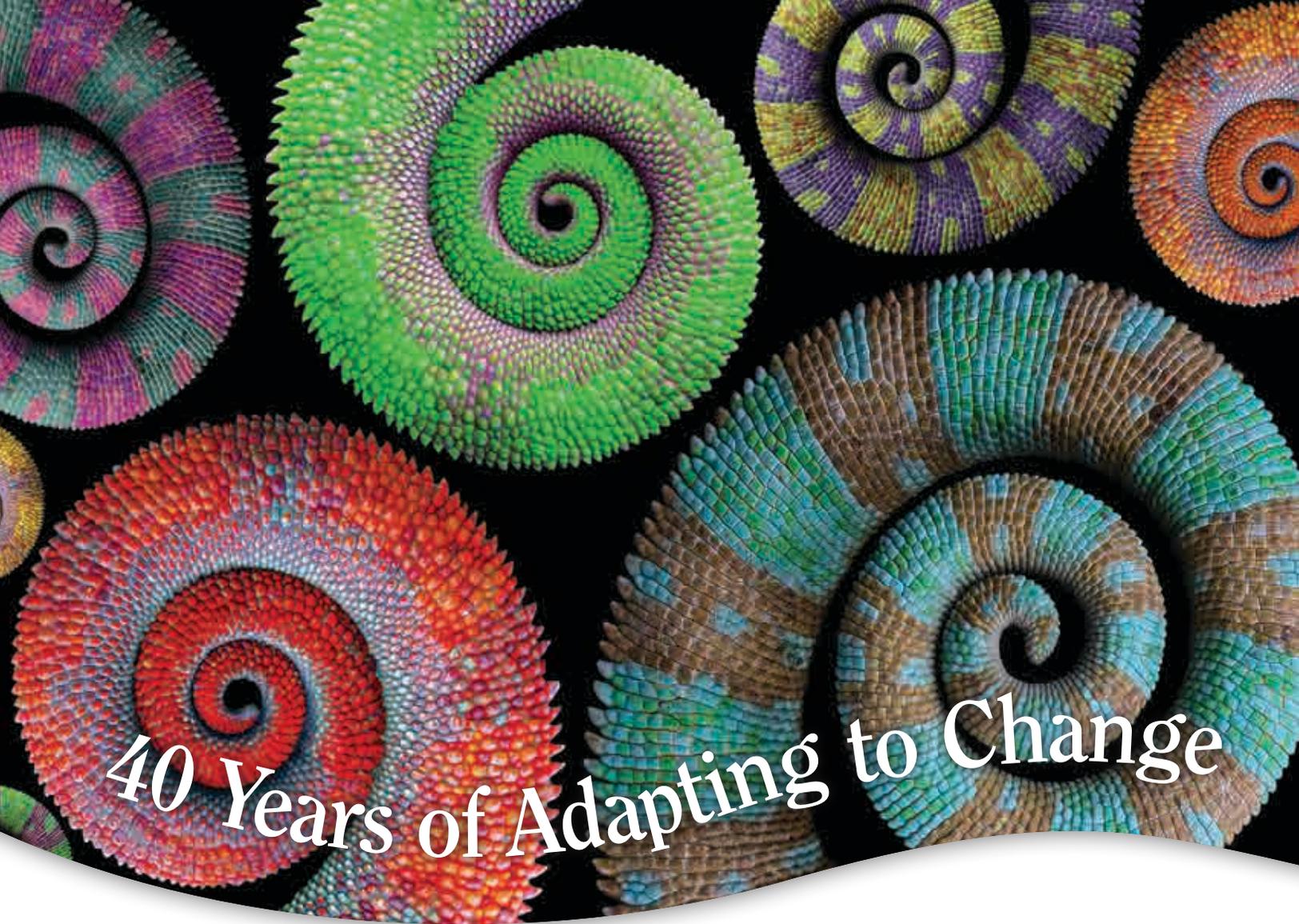
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Look for a copy of JD Supra's ring-a-word in your swag bag received during registration. Submit your completed entry at the conference registration desk (or to any JD Supra team member).  
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7:30 a.m.  
**Registration Opens**

7:30 – 8:30 a.m.  
**Breakfast in the Exhibit Hall**  
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7:30 a.m. – 1:30 p.m.  
**Exhibit Hall Open**

Be sure to build time in to your conference schedule to visit the Exhibit Hall. It is an exceptional one-stop opportunity to learn about the latest legal marketing products and services.

8:15 a.m.  
**General Session Doors Open**

8:30 – 9:00 a.m.  
**LMA Annual Report**

9:00 – 9:30 a.m.  
**LMA Hall of Fame Award Presentation**

9:30 – 10:30 a.m.  
**An Inside View: General Counsel Perspectives on the Use of Alternative Legal Service Providers and Artificial Intelligence**

As alternative legal service providers and artificial intelligence technology make their forays into the legal sector, in-house lawyers have increased options to meet their internal and external support needs. We talk to a panel of in-house leaders to hear what they think about these newcomers and the role each could play or is playing in meeting their legal needs.

We also know that some general counsels (GCs) may be hesitant to sever long-term relationships with outside counsel, despite the apparent advantages that these alternative providers have over traditional law firms, including more predictable and flexible pricing. Join us for an insider view to see if this really is the way of the future for the legal industry.

You will learn:

- Insights into how GCs view the emergence of new competitors and technology in the legal industry
- A deeper understanding of what goes into the sourcing decisions GCs are making today and how that may change in the next couple years



**William P. Barnette**  
*Associate General Counsel*  
**The Home Depot**



**Alexia J. Maas**  
*Senior Vice President, General Counsel*  
**Volvo Financial Services**



**Mark A. Smolik**  
*Chief Legal and Compliance Officer*  
**DHL Supply Chain Americas**

**Moderator:**



**Richard Caruso**  
*Vice President and General Manager, Legal Media*  
**ALM Media, LLC**

10:30 – 11:15 a.m.

**Networking and Refreshment Break in the Exhibit Hall**

10:45 – 11:15 a.m.

**Networking for Prizes Drawing in the Exhibit Hall**

Networking for Prizes is a fun and interactive activity designed to introduce you to the service provider community during the course of the conference.



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## Concurrent Breakout Sessions



### BREAKOUT ONE **A**

#### What's Next: Career Development for the Mid-Career Professional

As a mid-career professional with ten to 25 years of experience, you may be wondering about your next big step in your career progression. Join this law firm leader panel to explore a variety of career options covering a wide array of career potential, including director, CMO, firm operations and consulting. Learn how the panelists have progressed in their careers and the decisions they have made to lead them to their current roles, and discover what you need to know to set yourself apart from others.

You will learn:

- Different senior-level career paths and roles
- Educational options for business and personal growth
- Questions to answer in determining your next big professional step
- Ways to distinguish yourself from others for advancement
- How to use your networks to develop your career



**Jenna K. Schiappacasse**  
Director of Client Development  
**Rosenberg Martin Greenberg, LLP**



**Adam Severson**  
Chief Marketing and Business Development Officer  
**Baker, Donelson, Bearman, Caldwell & Berkowitz PC**



**Marcie Borgal Shunk**  
President and Founder  
**The Tilt Institute Inc.**

Moderator:



**Megan M. McKeon**  
Director of Business Development  
**Clark Hill PLC**



### BREAKOUT FOUR **A**

#### Driving Top-Line Growth With a Killer Proposal Strategy

Let's face the facts, folks. The expectation for law firm business development teams to drive top-line revenue is coming from every part of the organization — from the managing partner, to practice group leaders, to COOs. And, while taking control of revenue generation in the business development (BD) department might seem like a risky proposition, it presents many opportunities for those who can figure out how to navigate it via a killer proposal process and experience management strategies.

You will learn:

- Research results from 2018-2019 Best Practices in Proposal and Experience Management surveys and trends that will lead any law firm into the future
- Must-have components of law firm proposals
- A fail-safe proposal process and timeline, from start to finish, and how marketing and BD teams can use both to drive success
- Where most business development teams fail and strategies to prevent failure and increase winning



**Bob Robertson**  
Head of U.S. Marketing and Business Development  
**Freshfields Bruckhaus Deringer LLP**



**Keith Wewe**  
Vice President, Strategy and Solutions  
**Content Pilot LLC**



### BREAKOUT TWO **E**

#### 5 Essentials for Becoming a High-Powered Digital Marketing Organization

Law firms have historically lagged in digital marketing, but many are quickly catching up. Learn the steps world-class companies have taken to become effective digital-led brands — and how those learnings can be applied to B2B professional services firms. Hear practical advice and trends related to digital strategy, content development, distribution, analytics and measurement, and the power of video. This interactive session will include case studies, actionable takeaways and Q&A.

You will learn:

- Steps to developing an effective, focused digital content strategy
- How to build a digital measurement framework and demonstrate ROI
- Keys to unlocking the power of video — and how to build a video-centric content plan
- How to ensure you're reaching the right audience on the right channels at the right time



**Andrew Foote**  
Executive Vice President and Managing Director  
**Edelman Digital**



**Joseph Hammond**  
Co-Founder and Chief Executive Officer  
**Producify**



### BREAKOUT FIVE **A**

#### The Perfect Pitch: Through the Eyes of Clients

Clients view the pitch as an opportunity to predict their likely experience with your firm and are generally underwhelmed by expert-for-hire presentations. They want to leave the pitch with a clear sense of what it feels like to work with your team and an understanding of how the team frames its contributions in terms of how it helps clients grow, innovate and be more profitable.

Consequently, high-impact pitch is not simply a showcase of technical capabilities or legal results. Rather, the effective pitch provides the information that will help clients more accurately predict the experienced quality and commercial impact of your firm's service.

In this session, you will examine the anatomy of the perfect pitch and conduct an interactive exercise that allows you to see the pitch through the lens of clients.

You will learn:

- How to identify the reference points clients use to evaluate your pitch
- How to anticipate the high-value needs of prospective clients
- How to address potential client switching costs
- How to tune into pain points and identify reliable points of differentiation
- How to effectively communicate commercial or operational impact



**Werten F.W. Bellamy, Jr.**  
President  
**Stakeholders Inc.**



### BREAKOUT THREE **A**

#### Can We Learn From Uber, Amazon and Others and Use Data to Give People What They Actually Want From a Law Firm Website?

Uber picks you up, wherever we are and takes you home. It's not magic, it geolocates where you are and knows your home address. Amazon greets you and knows what you might like to buy. Again, it's not magic, it knows everyone's order and search history. They know what you want because they know you and that is what they give you.

As it becomes more widely accepted that traditional law firm websites are a reflection of a firm's structure rather than the reflection of client requirements, can we apply some of the same data based consumer centric principles on law firm websites that we see on consumer websites?

This session will look at some of the ways data is used in the consumer world and how it can be used to create customer centric approaches in professional services.



**Stephen R. DiGennaro**  
Director of Marketing Technology  
**Eversheds Sutherland (US) LLP**



**Jason M. Kennedy**  
Director of Marketing Operations  
**Pillsbury Winthrop Shaw Pittman LLP**



**Matt Parfitt**  
President  
**Vuture US**



### BREAKOUT SIX **A**

#### Social Responsibility and Sustainability Programs — and Why Law Firms Should Care

Are you ready? Clients are coming to expect it of their firms. Why aren't Diversity & Inclusion and pro bono programs enough? What is driving this increased focus on corporate social responsibility (CSR) by clients? What can firms do with respect to sustainability and the environment? What benchmarks or tools are available to firms interested in building a robust, holistic CSR program? Join this lively, engaging discussion of things to come — and how to use CSR to not only "do the right thing," but also to differentiate your firm and deepen relationships with your clients.

You will learn:

- Why CSR and sustainability are growing in importance with clients, and why law firms should care
- How a robust CSR and sustainability program differentiates your firm and what firms are doing now
- 10 key elements of a robust program and top 20 things you can do now to get started on sustainability best practices
- What are the United Nation's Global Goals and why do clients care? Why you should care and prepare
- How to choose a "signature" or "transformational" program for your firm and how to enlist clients



**Pamela Cone**  
Founder and Chief Executive Officer  
**Amity Advisory**



**Gayatri Joshi**  
Executive Director  
**Law Firm Sustainability Network**



**Mona Y. Sheth**  
Public Policy and Business Development Manager  
**Nixon Peabody LLP**

12:15 – 1:30 p.m.

### Networking Lunch

During lunch, tables will be reserved for each of LMA's regions. Take advantage of the opportunity to network with your regional colleagues, or if you aren't a member of LMA yet, join a table for your geographic location to meet legal marketers in your local area.

## Concurrent Breakout Sessions

### **BREAKOUT ONE E** Business Development Insights and Best Practices From the Big 4

Attendees will learn what the top firms in the Big 4 accounting group are doing to drive revenue growth through effective business development (BD) training, coaching and a dedicated team of client-facing business development professionals. Learn what the leading firm, Deloitte, does to train and coach thousands of practicing professionals on a regular basis in BD. Gather insights on how and why the Big 4 sees year-over-year ROI from the investment of time, money and resources allocated to their professionals when it comes to driving in revenue.

You will learn:

- The evolution of the professional services sales process
- Effective BD training and coaching programs
- How and why hiring dedicated client-facing BD professionals can make a difference in revenue growth
- Obstacles the Big 4 firms still face today with leveraging a client-facing sales team
- Practical tips that law firms can incorporate into their programs



**Tom Lutz**  
National Managing Director of Sales  
Deloitte Services LP



**Doug Ott**  
President  
Doug Ott Consulting LLC

### 1:30 – 3:45 p.m. **BREAKOUT FOUR A** **DEEP DIVE** Beyond Branding: Aligning Social Media Strategy With Business Development Goals

Explore how social media has developed far beyond a brand-building tool to a tool for accelerating the relationship-building process, leading to new business and enhanced client relationships. You will learn how to effectively use social media for lead generation and business development through practical, innovative, actionable and budget-friendly strategies and tactics. Then, you will work in groups to create a social media campaign based on your top takeaways from the session, which you can post to social media using the #LMA19 conference hashtag.

You will learn:

- How to develop content strategies that support your business development plan
- How to build an editorial calendar to plan future content and maximize content assets
- How to build a strong LinkedIn profile, evaluate connections and use the platform to generate business and new connections
- Effective analytics and measurement tools and what to do with them
- Tips for using analytics and metrics to write content that draws in readers



**Jennifer Simpson Carr**  
Director  
Knapp Marketing



**Stefanie M. Marrone**  
Director of Business Development and Marketing  
Tarter Krinsky & Drogin LLP

### **BREAKOUT TWO A** How to Secure a Seat and Have Your Voice Heard at the Power Table

A panel of diverse directors, CMOs and CBDMOs from Am Law 100, 200 and beyond will share their best practices for demonstrating value to the firm's leadership and the internal client. Gain tips and takeaways through real-life examples and success stories. Plus, hear stories about what not to do when you want to be heard. Your input and participation is encouraged and there will be ample time for your questions and comments. You will leave better equipped to forge a plan of action and timeline for becoming a trusted advisor to the firm while seated at the power table.

You will learn:

- Tips on effective communication with firm management and other leaders
- How to demonstrate exceptional value by contributing to the firm's priorities
- Pitfalls to avoid when establishing credibility and sharing your voice
- How to identify and contemplate opportunities and threats to the legal market, your firm and your department



**Wendy Bernero**  
Head of Client Development for North America  
Baker McKenzie



**Michael R. Coston**  
Chief Executive Officer  
Coston Consulting LLC



**Michelle Murray**  
Chief Marketing Officer  
Cahill Gordon & Reindel LLP



**Andrew Scott**  
Director of Business and Practice Development  
Seward & Kissel LLP

Moderator:



**Iris J. Jones**  
Chief Business Development and Marketing Officer  
McNees Wallace & Nurick LLC

### **BREAKOUT FIVE A** The Third Rail: Adding a Sales Function to Grow the Top Line

In 2017, K&L Gates expanded its traditional marketing and business development department structure to include a new function focused on developing new client relationships and expanding services to key client accounts. The shift included allocating existing resources and adopting a true startup mentality to build the processes, tools and framework necessary to support the client development function. In just 18 months, the team helped onboard dozens of new clients and hundreds of new matters for existing clients, and achieved other notable successes. This session will provide insight into the structure, processes and tools the team created to help grow the firm's top line.

You will learn:

- The process of developing and leading a dedicated client development function
- Tools to create new opportunities with key clients and prospects
- How to develop an effective sales pipeline and outcomes/ROI tracking and reporting
- How to obtain support from firm leadership and individual lawyers



**David Bowerman**  
Director of Client Development  
K&L Gates LLP



**Ashley Galston**  
Director of Client Development  
K&L Gates LLP

### **BREAKOUT THREE E** Market Positioning: The First Step in Differentiating Your Firm

Interested in differentiating your firm from its competitors? The first step is market positioning. If a law firm is effectively positioned, this can radically reduce the number of viable competitors.

This session is not about logos, taglines, or marketing materials. It is about owning a particular niche as a means of distinguishing yourself in the marketplace. A well-positioned firm with a clear, concise message is much easier to market and promote than one with a nebulous message. That's why it is essential to nail your positioning before beginning any big marketing project, like the development of a new website.

But here's the catch: positioning is really hard for law firms. So, how can a general-practice firm position itself for success?

You will learn:

- What "positioning" means and how it differs from branding
- Why positioning is essential
- Examples of great positioning from outside and inside the legal industry
- Overcoming the challenges law firms face when developing a market position
- Tricks for positioning a "full-service" law firm (that serves lots of services to many industries)
- The need to substantiate your firm's positioning



**Dion Algeri**  
Partner  
Great Jakes Marketing Company



**Robert Algeri**  
Partner  
Great Jakes Marketing Company

### **BREAKOUT SIX E** Buyer Behavior by the Numbers: A Cross-Generational Look at Decision Influences and Drivers of Engagement for Legal Buyers

Legal clients and prospects are changing — not what they care about, but what they expect from their experience with your firm. Mapping these changes by generation demonstrates the rising prominence (and influence) of the millennial client, whose preferences and behaviors have an impact on their Gen X and Baby Boomer counterparts upstream. What opportunities do legal marketers and business developers have to engage the modern buyer in new and compelling ways?

Sourcing from ClearlyRated's 2019 Legal Industry Benchmark Study, Kat Kocurek will unveil distinct changes, spotlight trends and debunk common misconceptions about how the modern legal client searches for, vets and makes the decision to hire a lawyer or firm. Beyond best practices for finding growth in today's flat market, Kat will discuss tactics and recommendations for building a marketing engine that sustains performance as buyer preferences continue to evolve.

You will learn:

- Key influences that impact the legal buyer decision journey
- Differences in buyer and client preferences by generation
- Opportunities to differentiate with the modern buyer
- Best practices for fueling firm growth in the age of digital disruption



**Kat Kocurek**  
Vice President of Marketing  
ClearlyRated

# Concurrent Breakout Sessions

## **BREAKOUT ONE** **A** The Outsourced Resource: How to Identify, Hire and Leverage Consultants With Internal Resources to Achieve Your Strategic Objectives

Law firms are continuing to pursue efficiencies – from technological advancements to outsourcing roles. Allowing certain support staff roles – or specific projects – in both the practice and business of law to be outsourced has been beneficial in enabling law firms to focus on the evolution of legal services. Outsourcing is relevant to marketing leadership, whose teams are often stretched thin and yet face expectations to deliver results, which are higher than ever. This panel dives into how to maximize your use of both external and internal resources to achieve strategic objectives.

You will learn:

- How to make the case for additional resources
- What outside resources are being hired for
- How best to plan and request budget dollars
- How to leverage budget dollars – partnering with other business service areas of the firm
- Last-minute hires – navigating the fortunate position of having to use remaining budget dollars
- How to avoid the “one and done” scenario: keeping the momentum going after the resource is gone

 **Ralph Allen**  
Chief Operating Officer  
**Allen Matkins**

 **Jamie Diaferia**  
Chief Executive Officer  
**Infinite Global**

 **Alina Gorokhovskiy**  
Chief Marketing Officer  
**Wiley Rein LLP**

 **Rina J. Sproat**  
Global Director of Business Operations  
**Baker & McKenzie LLP**

Moderator:

 **Toni Wells**  
Principal  
**Bespoke Marketing Partners LLC**

DEEP DIVE

1:30 – 3:45 p.m.

## **BREAKOUT FOUR CONT.** **A** Beyond Branding: Aligning Social Media Strategy With Business Development Goals

See session details on page 79.

### Breakout Key

- |   |   |
|---|---|
|  Business Development |  Marketing Management and Leadership |
|  Business of Law      |  Technology Management               |
|  Client Services      |   |
|  Communications       |   |

### Competency Level

- A** Advanced **E** Essential

## **BREAKOUT TWO** **A** Leveraging LinkedIn's Navigator to Scale Business Development

Busy and overtaxed marketers and business development professionals need to use all technologies at their disposal to leverage human effort to win business – and encourage and train lawyers to do so independently. With respect to LinkedIn, this means going beyond the basics. This session will provide case studies on how to leverage LinkedIn's Navigator platform in firms of various sizes and practice areas. Learn how to transform even your most hesitant of lawyers into bona fide business development machines.

You will learn:

- The impact that leveraging the full power of a firm's updated and real-time network can have on revenue
- How three firms have adopted the platform, implemented it globally and achieved lawyer buy-in and usage
- The ROI for each firm since inception
- The impact on all firms, from solo marketers supporting a few dozen lawyers to firms with global presence in dozens of offices, as well as niche practices focused on subjects, industries or geographies

 **Nathan Darling**  
Chief Business Development and Marketing Officer  
**Beveridge & Diamond PC**

 **Ann Meyer**  
Director of Marketing Operations  
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 **Ryan O. Emge**  
Senior Manager, Social Media  
**White & Case LLP**

 **Samantha McKenna**  
Head of Enterprise Sales, NYC  
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## **BREAKOUT FIVE** **E** CRM Therapy – The (Juris) Doctor Is in: Client CRM Confessions

Research suggests that up to 70 percent of CRM implementations fail to meet expectations. This not only results in a tremendous loss of money, time and resources, but also stress and anxiety for marketing professionals trying to implement the systems.

But CRM systems don't have to drive you crazy. During this therapy session (aka, presentation), marketing professionals who have implemented a variety of CRM systems will share their biggest headaches and frustrations from a “therapy couch.” And, the CRM “doctor” will offer some of the most successful “treatments/remedies” that include best practices for CRM success.

In this engaging and outside-the-box presentation, you will benefit from a “CRM therapy” session covering a variety of topics.

You will learn:

- The top reasons why CRM initiatives fail – and how to avoid them
- How to prevent denial by constructing a plan to enhance CRM success
- How to overcome “delusional expectations” by setting realistic goals and achieving them
- How to deal with data quality depression
- How to get “borderline personalities” to work together as a team

 **Paul Bonner**  
Director of Marketing  
**Venable LLP**

 **Christina R. Fritsch**  
Founder and CRM Success Consultant  
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## **BREAKOUT THREE** **E** Old Wine Isn't for New Bottles: Break Bad Communication Habits That Are Holding You Back

Effective communication is critical in a leadership role; it separates the poor leader from a brilliant one. Yet, strong communication skills remain one of the toughest to master. Many marketing professionals pride themselves on being strong communicators, but you may have a blind spot that is holding you back. Breaking through the blind spot can launch your professional development and career. Leverage your new insights to collaborate effectively with your internal stakeholders. Plus, hear best practices on how to advocate for MarTech projects.

You will learn:

- How to identify your professional blind spot – and how to overcome it
- How to deal with the “Lawyer Personality” effectively
- How to advocate for your marketing technology project with top two best practices

 **Elena Cutri**  
Director of Education Services  
**LexisNexis**

## **BREAKOUT SIX** **A** Million-Dollar Boot Camp

Join us for a case study on how to develop a successful, revenue-generating business development (BD) program for your lawyers. Discover the secrets this firm used to generate over a million dollars of business for a select group of lawyers in less than a year.

You will learn:

- Best practices for developing your own BD program
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- The impact of one-on-one coaching
- How to demonstrate ROI to your firm's decision-makers
- The power of marketing in teams and sharing successes

 **Beth Healey**  
President  
**Beth Healy Consulting**

 **Elizabeth Lockett**  
Chief Marketing and Business Development Officer  
**Miles & Stockbridge PC**

4:00 – 4:30 p.m.

### Conference Wrap Up

Concluding the 2019 LMA Annual Conference will be an interactive program that reviews the key themes and takeaways identified during this year's educational sessions. Hosted by LMA's 2019 president and conference co-chairs, this is an opportunity to gain insight into the breakout sessions you didn't attend and identify strategic and tactical next steps to implement some of the ideas you've heard when you return to the office.

PLUS – Attend for a chance to win a complimentary registration to the 2020 LMA Annual Conference. Participants of this session will be entered into a raffle for a complimentary registration to the 2020 LMA Annual Conference. The drawing will take place at the end of the session. You must be present to win.

4:30 p.m.

### Conference Concludes



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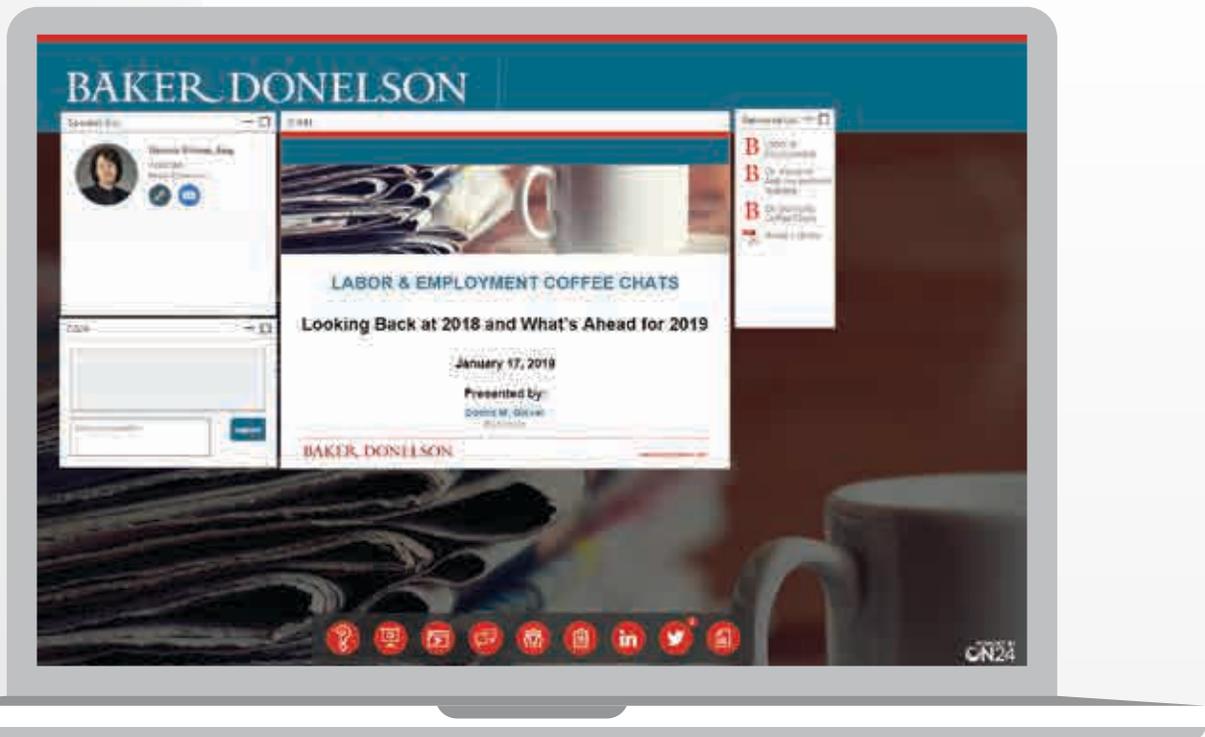


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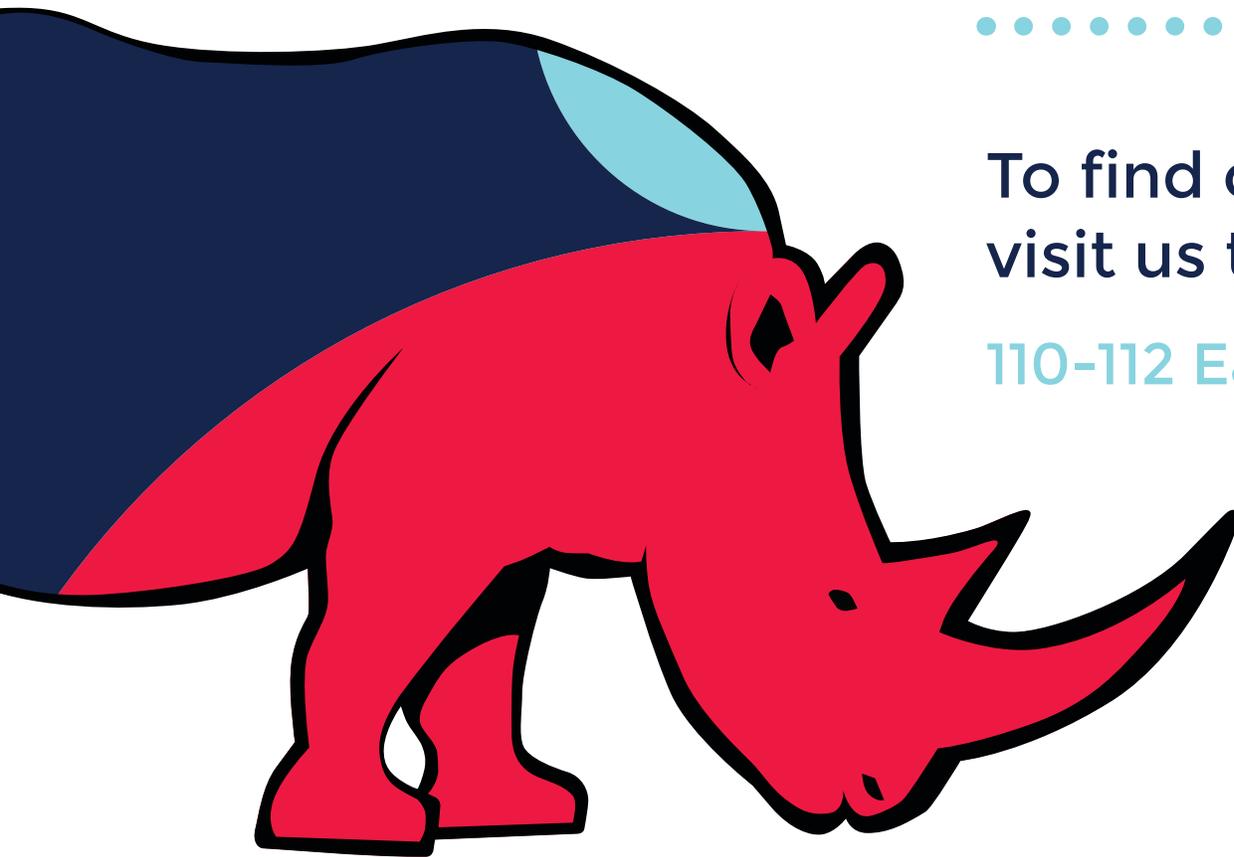
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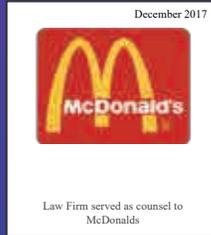
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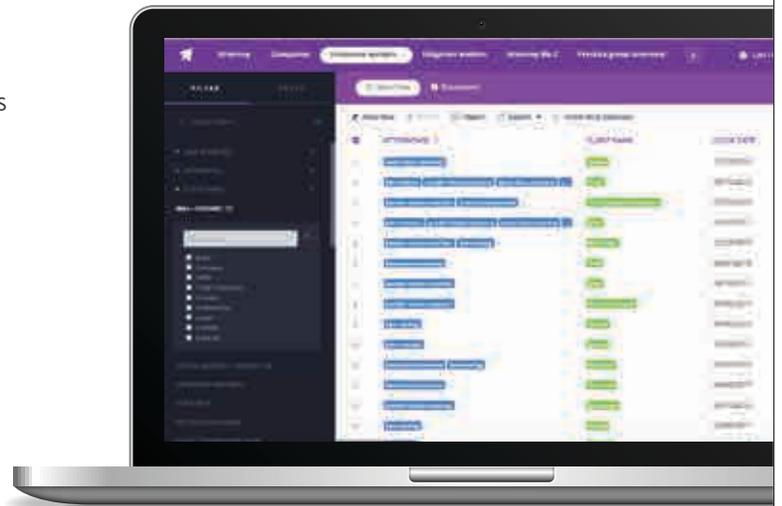
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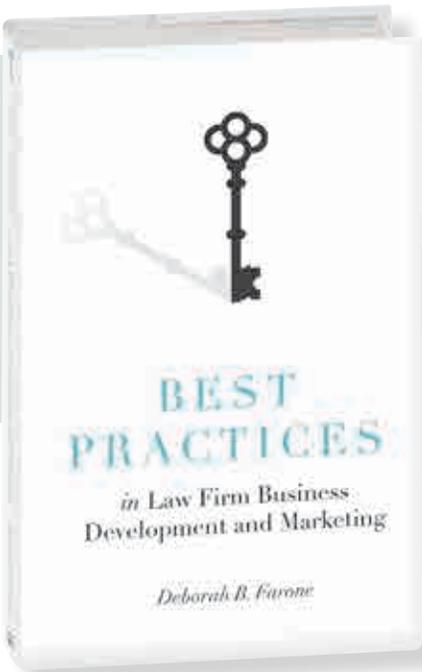
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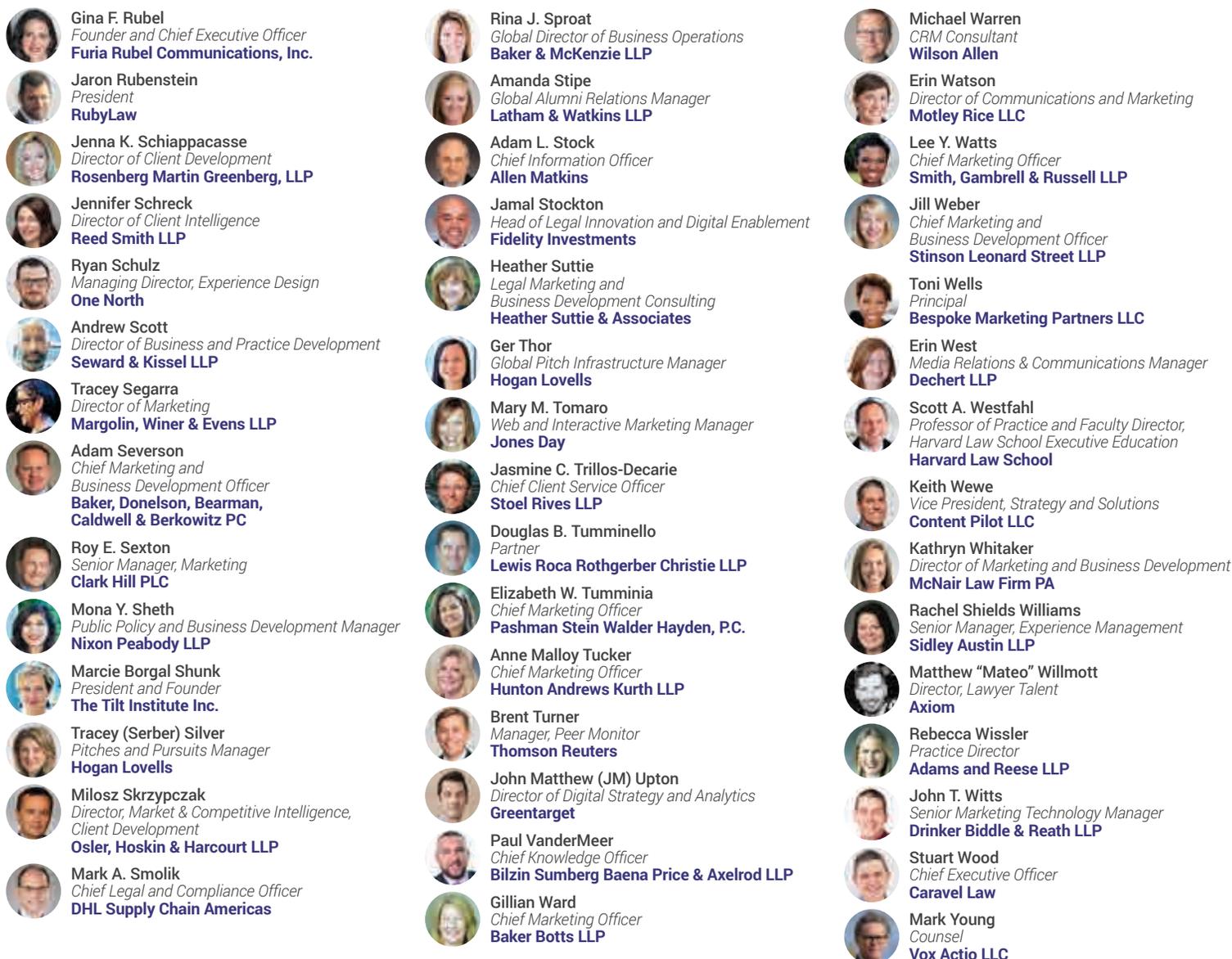
**Candace N. Rodriguez**  
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**Mark Ross**  
Executive Vice President and Global Head  
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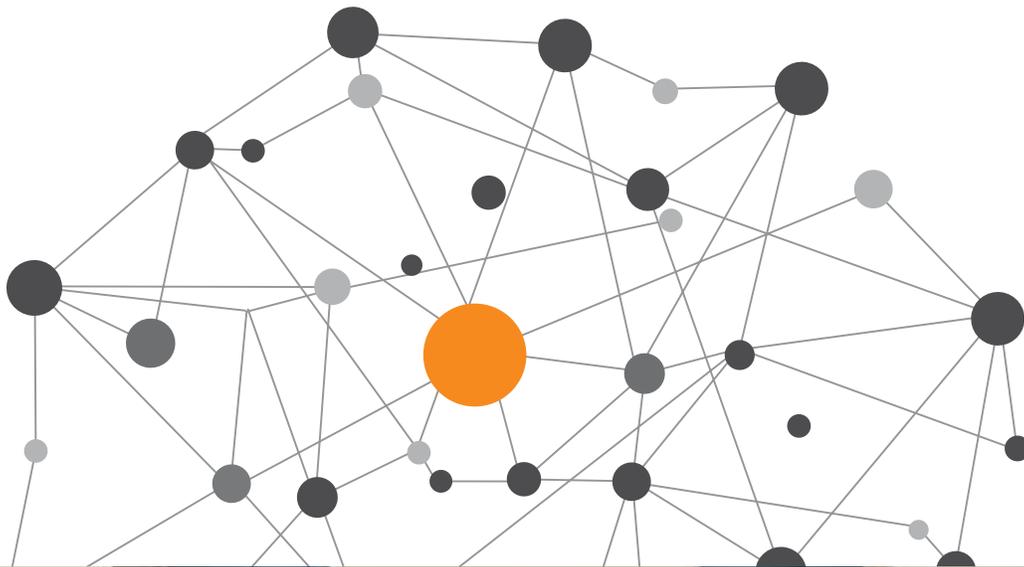
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**2015**

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**2013**

**Aleisha Gravit**  
Chief Client Services and Marketing Officer  
Akin Gump Strauss & Feld LLP  
Dallas, TX  
(Southwest Region)



**2012**

**Alycia Sutor**  
Managing Director  
GrowthPlay  
Chicago, IL  
(Midwest Region)



**2011**

**Jeanne Hammerstrom**  
Chief Marketing Officer  
Benesh, Friedlander, Coplan & Aronoff LLP  
Cleveland, OH  
(Midwest Region)



**2010**

**Nathan A. Darling**  
Chief Business Development  
and Marketing Officer  
Beveridge & Diamond, P.C.  
Washington, DC  
(Mid-Atlantic Region)



**2009**

**Jennifer A. Manton**  
Chief Marketing and  
Business Development Officer  
Kramer Levin LLP  
New York, NY  
(Northeast Region)



**2008**

**Lisa M. Simon**  
Chief Marketing and  
Business Development Officer  
Lewis Roca Rothgerber Christie  
Phoenix, AZ  
(Southwest Region)



**2007**

**Nathaniel (Nat) E. Slavin**  
Partner  
Wicker Park Group  
Chicago, IL  
(Midwest Region)



**2006**

**Kim A. Perret**  
Chief Marketing Officer  
Jones Walker  
Baton Rouge, LA  
(Southwest Region)



**2005**

**Diane E. Hamlin**  
President  
Hamlin Strategy Group



**2004**

**Nathalie Daum**  
Regional Director of Business  
Development and Marketing  
Dickinson Wright PLLC  
Phoenix, AZ  
(Southwest Region)



**2003**

**Heather Gray-Grant**  
Director of Business Development  
Borden Ladner Gervais  
Vancouver, BC  
(Western Canada Region)



**2002**

**Roberta Montafia**  
Chief Visionary Officer  
The Legal Mocktail  
The Villages, FL  
(Southeast Region)



**2001**

**Silvia L. Coulter**  
Principal  
LawVision Group  
Manchester, MA  
(Northeast Region)



**2000**

**Barbara Sessions, Esq.**  
Director of Business Development  
Winston & Strawn LLP  
Chicago, IL  
(Midwest Region)



**1999**

**Maggie T. Watkins**  
Chief Marketing Officer  
Sedgwick  
Kansas City, MO  
(Midwest Region)



**1998**

**Betsy W. Huntley**  
Principal  
Huntley Marketing  
Wayfield, MA  
(Northeast Region)



**1997**

**Robbin L. Smith**



**1996**

**Norm Rubenstein**  
Partner  
Zeughauser Group LLC  
Washington, DC  
(Mid-Atlantic Region)



**1995**

**Karen L. Braun**  
Co-Executive Director  
& Chief Marketing Officer  
Sullivan & Cromwell LLP  
New York, NY  
(Northeast Region)



**1994**

**Vicki Cummings**  
Director of Marketing  
and Business Development  
Smith Moore Leatherwood LLP  
Raleigh, NC  
(Southeast Region)



**1993**

**Kelly Kiernan Largey**  
Chief Marketing Officer  
Fish & Richardson PC  
Boston, MA  
(Northeast Region)



**1992**

**Kevin D. McMurdo**  
Principal  
McMurdo Consulting  
Vashon, WA  
(West Region)



**1991**

**Marceline O'Conner Johnson**  
Retired  
Chicago, IL  
(Midwest Region)



**1990**

**Michael R. Ralston**  
Business Development Manager  
Foley & Lardner LLP  
Chicago, IL  
(Midwest Region)



**1989**

**Donna L. G. Shaft**  
Marketing Counsel and Consultant for  
Professional Business Development  
DLG Shaft Consulting  
Oak Park, IL  
(Midwest Region)



**1988**

**Marilyn Astin Tarlton**  
Principal  
Astin Tarlton  
Golden, CO  
(Southwest Region)



**1987**

**Carol Scott James**  
Director of Marketing  
& Business Development  
Jeffer Mangels Butler & Mitchell LLP  
San Francisco, CA  
(West Region)



**1986**

**Sally Schmidt**  
President  
Schmidt Marketing, Inc.  
Minneapolis, MN  
(Midwest Region)

# LMA Hall of Fame Inductees *(updated as of March 22, 2019)*



**2018**  
**Anne Gallagher, Esq.**  
Director of Global Communications  
Jenner & Block LLP  
Chicago, IL  
(Midwest Region)



**2018**  
**Jeff Reade**  
Chief Executive Officer  
Cole Valley Software  
Medford, OR  
(West Region)



**2017**  
**Catherine Alman MacDonagh, J.D.**  
Chief Executive Officer and Co-founder  
Legal Lean Sigma Institute /  
Legal Mocktail / LSSO  
Norfolk, MA  
(Northeast Region)



**2017**  
**Jennifer A. Manton**  
Chief Marketing and  
Business Development Officer  
Kramer Levin Naftails & Frankel LLP  
New York, NY  
(Northeast Region)



**2017**  
**Merry Neitlich**  
Managing Partner  
EM Consulting  
Irvine, CA  
(West Region)



**2017**  
**Lisa M. Simon**  
Chief Marketing and  
Business Development Officer  
Lewis Roca Rothgerber Christie  
Phoenix, AZ  
(Southwest Region)



**2016**  
**David Bruns**  
Director of Client Services  
Farella Braun + Martel LLP  
San Francisco, CA  
(West Region)



**2014**  
**Mark Beese**  
President  
Leadership for Lawyers LLC  
Evergreen, CO  
(Southwest Region)



**2014**  
**Nathaniel E. Slavin**  
Partner  
Wicker Park Group  
Chicago, IL  
(Midwest Region)



**2013**  
**Kim A. Perret**  
Chief Marketing Officer  
Jones Walker  
Baton Rouge, LA  
(Southwest Region)



**2012**  
**Wendy Bernero**  
Head of Client Development  
for North America  
Baker McKenzie  
Bedford, NY  
(Northeast Region)



**2012**  
**Felice C. Wagner**  
Executive Director and General Counsel  
The Network of Trial Law Firms  
Pompano Beach, FL  
(Southeast Region)



**2011**  
**Silvia L. Coulter**  
Principal  
LawVision Group  
Manchester, MA  
(Northeast Region)



**2011**  
**Susan Saltonstall Duncan**  
President  
Rainmaking Oasis, LLC  
Old Lyme, CT  
(Northeast Region)



**2011**  
**Charles Maddock**  
Principal  
Altman Weil, Inc.  
Newtown Square, PA  
(Northeast Region)



**2011**  
**Elonide Semmes**  
President  
Right Hat LLC  
Chicago, IL  
(Midwest Region)



**2010**  
**Jim Durham**  
Chief Marketing Officer  
Clark Hill  
Dedham, MA  
(Northeast Region)



**2010**  
**Kevin D. McMurdo**  
Principal  
McMurdo Consulting  
Vashon, WA  
(West Region)



**2009**  
**Ann Lee Gibson**  
Principal  
Ann Lee Gibson Consulting  
West Plains, MO  
(Midwest Region)



**2009**  
**Marceline O'Conner Johnson**  
Retired  
Chicago, IL  
(Midwest Region)



**2008**  
**Burkey Belser**  
President  
Greenfield/Belser Ltd.  
Washington, DC  
(Mid-Atlantic Region)



**2008**  
**Robert Denney**  
Managing Director, East Coast Region  
Abstone Alley  
West Chester, PA  
(Northeast Region)



**2008**  
**Mark Greene**  
Principal  
Market Intelligence LLC  
Hendersonville, TN  
(Southeast Region)



**2008**  
**Deborah McMurray**  
Chief Executive Officer and  
Strategy Architect  
Content Pilot, LLC  
Dallas, TX  
(Southwest Region)



**2008**  
**Roberta Montafia**  
Chief Visionary Officer  
The Legal Mocktail  
The Villages, FL  
(Southeast Region)



**2007**  
**Ross Fishman, J.D.**  
Chief Executive Officer  
Fishman Marketing Inc.  
Highland Park, IL  
(Midwest Region)



**2007**  
**Norm Rubenstein**  
Partner  
Zeughauser Group LLC  
Washington, DC  
(Mid-Atlantic Region)



**2007**  
**Sally Schmidt**  
President  
Schmidt Marketing, Inc.  
Minneapolis, MN  
(Midwest Region)



**2007**  
**Merrilyn Astin Tarlton**  
Principal  
Astin Tarlton LLP  
Golden, CO  
(Southwest Region)

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**Cameron Smith**  
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### Annual Conference



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**Ken Glass**  
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*Atlanta*

A large, stylized word "Atlanta" is written in a blue, cursive script. The letters are filled with a photograph of the Atlanta skyline, including skyscrapers and trees with autumn foliage, reflected in a body of water. The word is positioned in the lower half of the page.