

Managing Partners and Law Firm Leaders Conference

**Because Your Responsibilities Are Unique,
Your Education Opportunities Should Be Unique**

- Geared exclusively to the needs and opportunities of the defense bar and firm leaders
- Tailored breakout sessions providing defense law firm leaders with a forum to exchange ideas and best practices designed to promote long-term growth and profitability
- Two in-depth single-topic workshops offered to assist with strategic planning and the use of data metrics
- Great social and networking opportunities, including an opening night reception



September 14-15, 2017

The Gwen Hotel

Chicago, Illinois

DRI delivers **resources** to build your practice ■

DRI—The Voice of the Defense Bar has been providing gold
standard legal education for over five decades and

TheRemsenGroup is renowned for its annual managing partner conferences in Atlanta. Because of the popularity of our inaugural conference in 2016, we have again joined together in 2017 to present our second conference geared exclusively to managing partners of the defense bar. The conference is open only to DRI members.

New this year will be two in-depth, 2-3 hour, single-topic workshops conducted the afternoon before the Friday conference. Attendees can select either of two sessions: “Using Data and Metrics to Enhance Profitability” or “Planning a Successful Firm Culture: Developing and Implementing a Strategic Plan for Your Firm.”

The keynote address will be by Bill Carter, President and CEO, ALM Media Properties LLC, New York, an accomplished expert in the digital and legal services industry. ALM is a leading provider of news and information for the legal markets, with brands that include the *American Lawyer*, *Corporate Counsel*, *Law.com*, *LegalTech*, and the *National Law Journal*. His address will be followed by a panel of defense bar experts.

But the lion's share of the day will be devoted to what you have requested: three breakout sessions with an open and vigorous exchange of ideas and best practices among managing partners and firm leaders on those challenges that are most important to you. The breakout sessions will once again be facilitated by three former DRI presidents. To ensure a quality experience, attendance will be capped at 100 registrants.

There will also be great social and networking opportunities at an opening reception and luncheon.

So, join us at The Gwen Hotel, one of Chicago's finest meeting venues, for a high-value experience with those who most clearly understand your challenges and are, therefore, most able to provide you solutions.



James (Jay) R. Courie
DRI Managing Partners Advisory
Committee Chair and DRI Managing
Partners and Law Firm Leaders
Conference Co-Chair



John Remsen, Jr.
DRI Managing Partners and Law Firm
Leaders Conference Co-Chair

Organized by **DRI** and **TheRemsenGroup** under the auspices of
DRI's Law Practice Management Committee.

PROGRAM SCHEDULE

Click on any speaker name to view bio.

THURSDAY, SEPTEMBER 14 2:00 p.m.–5:00 p.m.

1:00 p.m. **Registration**

OPTIONAL ADD-ON SESSIONS *(\$125 fee is in addition to base program fee.)*

■ SESSION 1

Using Data and Analytics: Making Your Firm More Profitable and Competitive in Today's Environment

The business of law is changing at a record pace. To remain viable firms must understand the significant internal and external factors affecting our businesses. Clients demand efficiency, better legal product, and lower cost. To compete in this market, firms cannot continue the traditional business-as-usual mode. This workshop will focus on the following:

- understanding client demands, including efficient case handling and early resolution;
- capturing data to improve individual and firm efficiencies;
- understanding disruptors and existing threats to traditional law firms;
- gaining a competitive marketing advantage through understanding and utilizing internal and external metrics; and
- improving profitability through efficiencies such as technology, staffing ratios, outsourcing, and leverage.

FACILITATORS

James (Jay) R. Courie, *Managing Partner*, McAngus Goudelock & Courie, Columbia, SC

William J. Josten, *Manager of Legal Industry Analytics*, Thomson Reuters Legal Executive Institute, Eagan, MN

■ SESSION 2

Planning for a Successful Firm Culture: How to Develop and Implement a Strategic Plan for Your Firm

In today's increasingly competitive market for legal services, every law firm needs a firm-wide strategic plan. It should be simple, realistic, and achievable. A good, successfully implemented plan builds cohesiveness, improves profitability, and creates a more sustainable law firm. It lives, breathes, and guides firm decisions. Yet, many firms don't have strategic plans. And many firms with plans admit failing on their goals and objectives. In this practical workshop, attendees will learn the following:

- why firms need strategic plans;
- how to sell the strategic planning process to your partners;
- how to embark on the strategic planning process;
- what strategic objectives insurance defense firms are chasing; and
- the keys to successful implementation.

FACILITATORS

John Remsen, Jr., *President*, TheRemsenGroup, Atlanta, GA

John C. Trimble, *Firm Counsel*, Lewis Wagner LLP, Indianapolis, IN

6:00 p.m. **Registration**

6:00 p.m.–7:00 p.m. **Welcome Reception**

FRIDAY, SEPTEMBER 15 Main Program

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

8:00 a.m. **Networking Continental Breakfast**

8:30 a.m. **Welcome**

James (Jay) R. Courie, *Managing Partner*, McAngus Goudelock & Courie, *Chair*, DRI Managing Partners Advisory Committee, Columbia, SC

John Remsen, Jr., *President*, TheRemsenGroup, DRI Managing Partners and Law Firm Leaders Conference *Co-Chair*, Atlanta, GA

John E. Cuttino, *DRI President, Shareholder*, Gallivan White & Boyd, Columbia, SC

9:00 a.m. **Keynote Address: The Future of the Business of Law**

After decades of stability, the legal industry has become increasingly competitive. Power shifts have upended the business of law. The corporate legal department has taken more work in-house, and new entrants have emerged with alternative business models and technological advances powered by increased computing power. Law firms have responded in the short-term with mergers and acquisitions and intensified recruiting of lateral partners. Our speaker will review these trends and discuss the longer-term outlook for the law firm business model.

Bill Carter, *President and CEO*, ALM Media Properties LLC, New York, NY

9:45 a.m. **Morning Break**

FIRM LEADER BREAKOUT SESSIONS 10:15 a.m.–3:30 p.m.

Former DRI presidents will lead each breakout group. Each group will stay with their assigned facilitator throughout the day. This approach will allow more time to discuss key matters and develop tailored action plans that will drive growth and profitability. Group size and assignments will be based on registration demographics.

■ **BREAKOUT GROUPS**

Group 1: Firms with <25 lawyers

FACILITATOR | **J. Michael Weston**, *Managing Partner*, Lederer Weston Craig PLC, Cedar Rapids, IA

Group 2: Firms with 25–100 lawyers

FACILITATOR | **Sheryl J. Willert**, *Member*, Williams Kastner, Seattle, WA

Group 3: Firms with >100 lawyers

FACILITATOR | **Marc E. Williams**, *Managing Partner*, Nelson Mullins Riley & Scarborough LLP, Huntington, WV

10:15 a.m. **Firm Leader Breakout Sessions**

Topic 1: Business Development Strategies in a More Technology-Driven World

- Specifically, what is your firm doing on a regular basis to build and enhance its relationships with current clients?
- Is your firm in a law firm network? If so, would you recommend one to other firms, and what are you doing to get the most out of it?
- What are the benefits and risks of using social media to develop your firm's brand and new business?
- Does your firm have formal social media policies in place? Does your firm provide social media training?
- How can your firm's website be an effective tool, including how you can distinguish your firm's website from all the other competing websites?
- How can your firm measure the effectiveness of marketing, including websites and social media?
- Does your firm have a marketing director? What are his or her major contributions? To whom does he or she report?

12:00 p.m. **Networking Luncheon**

1:00 p.m. **Firm Leader Breakout Sessions Continue**

Topic 2: Maintaining and Increasing Profitability

- Does your firm analyze profitability by client, by matter, by practice group, by lawyer, and by office? If so, what have you learned? If not, why?
- Does your firm use and analyze metrics? If so, what do you track, review, and act on?
- How can you determine what a competitive business model is for your firm?
- Does your firm have a modern and competitive strategy for determining proper staffing ratios?
- How can your firm optimize use of virtual offices or offsite staffing to increase competitiveness?
- What are the pros and cons of virtual offices, offsite staffing, and outsourcing?
- Does your firm aggressively and proactively seek regular rate increases from its current clients?
- What strategies has your firm successfully executed to attract clients who are willing to pay higher hourly rates?
- What can your firm do to develop and implement effective rate strategies and alternative pricing models?

2:15 p.m. **Afternoon Break**

2:30 p.m. **Firm Leader Breakout Sessions Continue**

Topic 3: Growth and Sustainability

- Does your firm have a written, firm-wide strategic plan? If so, what are your strategic priorities?
- What have you found to be the keys to establishing and growing branch offices successfully?
- What has been your firm's experience with mergers/acquisitions and lateral hires?
- Has your firm successfully built more lucrative practice groups around lateral hires?
- How can your firm use hiring to encourage sustainability? Is diversity (in all its forms) important to sustainability, and, if so, how?
- Does your firm have a formal process to ensure successful transition of its senior lawyers?
- What other factors affect your firm's ability to hire qualified, motivated new lawyers, including student loan debt, generational impressions of the legal profession, and other factors?
- How can you continue to grow in the era of consolidation of insurance panels and commoditization of lawyers?
- Does your firm have an effective plan for client and leadership succession?

3:30 p.m. **Adjourn**

FACULTY

Click on any name to view bio.

Bill Carter, President and CEO, ALM Media Properties LLC, New York, NY

James (Jay) R. Courie, Managing Partner, McAngus Goudelock & Courie, Columbia, SC

John E. Cuttino, DRI President, Shareholder, Gallivan White & Boyd, Columbia, SC

William J. Josten, Manager of Legal Industry Analytics, Thomson Reuters Legal Executive Institute, Eagan, MN

John Remsen, Jr., President, TheRemsenGroup, Atlanta, GA

John C. Trimble, Managing Partner, Lewis Wagner LLP, Indianapolis, IN

J. Michael Weston, Managing Partner, Lederer Weston Craig PLC, Cedar Rapids, IA

Sheryl J. Willert, Member, Williams Kastner, Seattle, WA

Marc E. Williams, Managing Partner, Nelson Mullins Riley & Scarborough LLP, Huntington, WV

View faculty bios on the [Managing Partners and Law Firm Leaders Conference webpage](#); click on "View speakers" button.

GENERAL INFORMATION

CLE Accreditation

This seminar has been approved for MCLE credit by the State Bar of California for up to **7.75** hours. Accreditation has been requested from every state with mandatory continuing legal education (CLE) requirements. Certificates of attendance will be provided to each attendee. Attendees are responsible for obtaining CLE credits from their respective states. Credit availability and requirements vary from state to state; please **check the DRI website** at dri.org for the latest information for your state.

Registration Policy

Save \$100 when you register by August 22, 2017. (See the registration form for pricing.) The registration fee includes course materials, continental breakfasts, refreshment breaks, networking receptions and lunch. If you wish to have your name appear on the registration list distributed at the conference and receive the course materials in advance, DRI must receive your registration by **August 22, 2017** (*please allow 10 days for processing*). Registrations received after **August 22, 2017**, will be processed on-site. Open to Managing Partners and high-level decision-makers. Space is limited to 100 attendees and will be registered on a first-come first-served basis.

Free seminar certificates cannot be used or applied towards registration for the Managing Partners and Law Firm Leaders Conference.

Refund Policy

The registration fee is fully refundable for cancellations received on or before **August 22, 2017**. Cancellations received after **August 22** and on or before **August 29, 2017**, will receive a refund, less a \$100 processing fee. Cancellations made after **August 29** will not receive a refund, but a \$100 certificate good for any DRI seminar within the next 12 months will be issued. All cancellations and requests for refunds must be made in writing. Fax (312.795.0747) or email (seminars@dri.org) to DRI's Accounting Department. Processing of refunds will occur within four weeks after the date of the seminar. All refunds will be processed in the same method that the payment was received. Substitutions may be made at any time without charge and must be submitted in writing.

- The taping or recording of DRI seminars is prohibited without the written permission of DRI.
- Speakers and times may be subject to last-minute changes.
- DRI policy provides there will be no group functions sponsored by others in connection with its seminars.

Hotel Accommodations

A limited number of discounted hotel rooms have been made available at **The Gwen Hotel, 521 Rush Street, Chicago, IL 60611** ([click here](#) to view hotel photos).

Take advantage of the group rate of **\$289 Single/Double** in one of two ways:

- 1) Reserve online: [Click here](#) or visit dri.org and go to the **Managing Partners and Law Firm Leaders Conference** page and click on the "Book hotel" button.
- 2) Or **contact the hotel directly at 888.627.7039** and mention the **Managing Partners and Law Firm Leaders Conference**.

The hotel block is limited and rooms and rates are available on a first-come, first-served basis. You must make reservations by **August 22, 2017**, to be eligible for the group rate. Requests for reservations made after **August 22** are subject to room and rate availability.

SEMINAR SPONSORS

DRI wishes to thank our sponsors for their support at this year's seminar!

LawyerGuard[®]

THE EXPERTS
Robson Forensic



mgc | INSURANCE
DEFENSE

TheRemsenGroup
Smart Strategies for the Forward Thinking Law Firm



Diversity and Inclusion in DRI: A Statement of Principle

DRI is the largest international membership organization of attorneys defending the interests of business and individuals in civil litigation.

Diversity is a core value at DRI. Indeed, diversity, which includes sexual orientation, is fundamental to the success of the organization, and we seek out and embrace the innumerable benefits and contributions that the perspectives, backgrounds, cultures, and life experiences a diverse membership provides.

Inclusiveness is the chief means to increase the diversity of DRI's membership and leadership positions. DRI's members and potential leaders are often also members and leaders of other defense organizations. Accordingly, DRI encourages all national, state, and local defense organizations to promote diversity and inclusion in their membership and leadership.

Managing Partners and Law Firm Leaders Conference

September 14-15, 2017 | The Gwen Hotel | Chicago, Illinois

Register online
Download form to fax or mail

FORMAL NAME _____ TITLE _____

NAME (as you would like it to appear on badge) _____

COMPANY/FIRM/LAW SCHOOL _____

ADDRESS _____

CITY _____ STATE/PROVINCE _____ ZIP/POST CODE _____

TELEPHONE _____ FAX _____ EMAIL _____

Please list any special needs _____

Are you a first-time attendee at this DRI seminar? Yes No

How many attorneys are in your firm? _____ What is your primary area of practice? _____

REGISTRATION FEE

Registration fee includes conference attendance, networking events, and course materials. DRI will email a link to download the course materials to all registrants two weeks in advance of the conference.

	On or before Aug. 22, 2017	After Aug. 22, 2017	<i>For inclusion on the preregistration list and to receive course materials in advance, register by August 22, 2017.</i>
<input type="checkbox"/> Member	\$895	\$995	
<input type="checkbox"/> Session 1	\$125	\$125	
<input type="checkbox"/> Session 2	\$125	\$125	

PAYMENT METHOD

My check for _____ (USD) is enclosed.
 Please charge my VISA MasterCard American Express.

3400-0185-21
Managing Partners

2017-0185B

Card # Exp. Date - CVC

Signature _____

Please remit payment by **MAIL** to:
DRI
72225 Eagle Way, Chicago, IL 60678-7252

Please remit payment by **COURIER** to:
JP Morgan, Attn: DRI LBX 72225
131 S. Dearborn, 6th Floor, Chicago, IL 60603