

Managing Partners and Law Firm Leaders Conference

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

- Programming specifically tailored to the needs of firm leaders
- Obtain an in-depth understanding of business metrics, succession planning, law firm culture, and other issues related to managing the modern practice in today's competitive market.
- Learn how to make sound business development decisions to differentiate your firm strategically in an increasingly commoditized market.
- Gain unique insights from leading authorities about hiring practices, emerging business trends, and where they see the practice of law headed in the future



September 6-7, 2018

Loews Chicago Hotel | Chicago, IL

DRI—The Voice of the Defense Bar, which has been providing gold-standard legal education for over five decades, proudly presents this unique program specifically for managing partners and law firm leaders. The keynote address will be by Eric A. Seeger, Principal, Altman Weil Inc., Willow Grove, PA, an accomplished expert. During the program you will also have the opportunity to hear from and network with leading authorities from Boeing, Microsoft, and Starbucks and more!

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



James R. (Jay) Courie

Chair, DRI Managing Partners
Advisory Committee



Amy L. Miletich

Vice Chair, DRI Managing
Partners Advisory Committee

Organized by **DRI** under the auspices of the
DRI Law Practice Management Committee.

Register online now at dri.org or complete the form in the back.



- Participate in sessions that will provide you with forums to exchange ideas and best practices to promote long-term growth and profitability
- Take time to discuss strategic planning and the use of data metrics
- Learn and apply new strategies to retain staff

Members Get More

- Access to **LegalPoint**™ at **dri.org**: Committee newsletters, seminar course materials, and other publications.
- Access to the **DRI Law Practice Management Committee Community**: Share articles, post blogs, and connect with others on the latest trends in your area of practice.
- Access to **dri circles**, where lawyer-to-lawyer connections happen. Search **dri circles** in your app store:



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PROGRAM SCHEDULE

Click on any speaker name to view bio.

THURSDAY, SEPTEMBER 6

11:30 a.m. **Registration**

1:00 p.m. **DRI Update**

John F. Kuppens, DRI President, *Partner*, Nelson Mullins Riley & Scarborough LLP, Columbia, SC

1:15 p.m. **Emerging Trends in Purchasing Legal Services and the Use of Outside Counsel**

Clients today have many options in choosing who to represent them. Given budget and other constraints, the expectation is lower costs, higher predictability, faster resolution, and better outcomes. Modern technology and the ability to accumulate and analyze data provide an opportunity for general counsel and insurance panel counsel managers to measure and reward firms based on objective performance. In fact, many clients are significantly reducing the number of outside referral firms, based on costs and performance measured against competitors. Many companies are also relying on third-party vendors for services historically performed by traditional law firms. This session will explore what firms need to do to remain competitive and relevant in today's business and economic climate.

MODERATOR | **John E. Cuttino**, DRI Immediate Past President, *Partner*, Gallivan White & Boyd PA, Columbia, SC

➤ **Mark C. Fava**, *Chief Counsel—Boeing Commercial Airplanes*, Boeing South Carolina, North Charleston, SC

➤ **Katina C. Thornock**, *Director, Corporate Counsel*, Starbucks Coffee Company, Seattle, WA

➤ **Michael D. Zeoli**, *Vice President*, Chubb, New Haven, CT

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

SPONSORED BY **Lewis Wagner**

2:30 p.m. **Workshop 1: Successfully Managing the Modern Practice**

The actual practice of law, while vital, is only one facet to consider in today's modern law firms. To run today's legal practices, lawyers must be adept at attracting and retaining clients, running the operations of the firm, and managing firm finances, none of which was taught in law school. This session explores the myriad roles that today's law firm leaders need to fill, with an in-depth exploration of some of the most common pain points, as well as ideas about how to meet those challenges. Whether your lawyers are confronting questions around business development best practices, billing and cash management

cycles, inefficient workflows, or financial metrics, this session will have valuable takeaways to help you look toward the future.

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

William J. Josten, *Manager, Strategy and Performance*, Thomson Reuters Legal Executive Institute, Eagan, MN

3:30 p.m.

Networking Break

SPONSORED BY **Lewis Wagner**

3:45 p.m.

Workshop 2: Succession Planning

Corporate America is all about planning, and succession planning is always part of it. Surprisingly, in the legal profession, the vast majority of law firms have no succession plan and no understanding of the disasters that can befall a firm that loses a founder, a key leader, or a major rainmaker. This fast-paced, interactive workshop will address the reasons that lawyers don't plan for succession, the range of problems that can arise from the lack of a plan, the many obvious and the hidden barriers to succession planning, how to start the planning process, how to use succession planning to retain and advance younger lawyers, and a whole array of practical suggestions to make succession planning a reality in your firm.

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

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

4:45 p.m.

Adjourn

6:00 p.m.

Networking Reception (held in conjunction with the DRI Cybersecurity and Data Privacy Seminar)

SPONSORED BY **McAngus Goudelock & Courie LLC**

FRIDAY, SEPTEMBER 7

7:45 a.m.

Networking Breakfast

Coffee and Continental Breakfast

8:30 a.m.

Keynote: The Law Firm of the Future

Eric A. Seeger of legal management consultancy Altman Weil will discuss trends in the legal profession and what managing partners should focus on to improve competitiveness and accelerate future performance. Mr. Seeger specializes in law firm strategy and practice group performance. He is co-author of Altman Weil's highly influential *Law Firms in Transition Survey*, an annual survey of the managing partners of hundreds of U.S. law firms.

Eric A. Seeger, *Principal*, Altman Weil Inc., Willow Grove, PA


9:30 a.m.

The Law Firm of the Future: What Can Firms Do to Adapt?

The panelists will provide unique insights into the firm of the future. Based on their background and experiences, these leaders will share thoughts on the tools and practices that firms can utilize to profit and to remain competitive in the ever-changing legal environment. Market challenges, emerging business practices, and future client expectations will also be addressed.

MODERATOR | **Eric A. Seeger**, *Principal*, Altman Weil Inc., Willow Grove, PA

Tom Finke, *Managing Director, West Region Operations*, Axiom Law, Chicago, IL

 **Dennis C. Garcia**, *Assistant General Counsel*, Microsoft Corporation, Chicago, IL

Christopher T. (Chris) Wilson, *Corporate and Finance Partner*, Taylor English Duma LLP, Atlanta, GA

10:30 a.m.

Networking Break

10:45 a.m.

The New World of Law Firm Marketing and Business Development

Given ongoing changes in the legal industry and in marketing across industries, firms of all sizes are pursuing innovative marketing strategies to raise brand awareness, improve communications, increase effectiveness in business development, and ensure client loyalty. Legal strategy and marketing consultant Marci Krufka Taylor will discuss how to invest strategically in marketing efforts to differentiate your firm in an increasingly commoditized market.

Marci Krufka Taylor, *Founder*, Mantra Partner LLC, Sedona, AZ

11:30 a.m.

How to Market and Grow Your Practice Effectively

Hear from a panel of experts who will share advice based on their years of experience in law firm marketing. These experts will provide key insights into the tools and strategies needed to develop your personal brand and the numerous marketing strategies needed to expand your practice.

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

Katherine M. Miletich, *Director of Marketing*, Vedder Price PC, Chicago, IL

Sally J. Schmidt, *President*, Schmidt Marketing Inc., Edina, MN

Marci Krufka Taylor, *Founder*, Mantra Partner LLC, Sedona, AZ

12:30 p.m.

Lunch



Denotes the **DRI CLIENT CONNECTION**: In-house and claims professional speakers

1:30 p.m.


Business of Law

The practice of Law is a time-honored and noble profession. In today's business environment, we must also consider the bottom line. The old way of doing business is gone and will likely not return. This session will explore how law firms are moving toward a more aggressive and sophisticated business model, including non-lawyer executive teams; implementing more sophisticated technology to develop internal and external metrics; developing strategies to increase profit margins; and focusing on efficiency through legal process management, increased lateral hiring, and use of outsourcing. We will also address expense management, including reduced and more efficient office space; virtual staffing; and evaluating return on investment of certain marketing activities, including membership in national, state, and local professional organizations.

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

Richard J. Cohen, *Managing Partner*, Goldberg Segalla LLP,
Buffalo, NY


John R. Sparks, Sr., *Of Counsel*, Fowler Hirtzel McNulty
Spaulding LLP, Philadelphia, PA

 **Daniel A. Winkler**, *Director—Claims Legal*,
Westfield Insurance Company, Westfield Center, OH

2:15 p.m.

Law Firm Security: The Dos and Don'ts

Security and vigilance against cybercrime have become major focuses of law firms today. The attacks are constant and law firm clients are requiring assurances that firms are taking proper precautions. The myriad questionnaires have become significantly burdensome but are a way of life for firms. This session will address many of the things that can be done to put your firm in a position to address and avoid cyberattacks. We will look at email-targeted threat protection, patching, web filtering, log review, policy change management, end-point modeling, and threat protection. We will also touch on vulnerability scanning and intrusion protection. Incorporating security awareness training into your firm is at the heart of any proper program.

MODERATOR |  **Michael S. Kraft**, *Founder and General Counsel*,
Kraft & Kennedy Inc., New York, NY

Mark G. McCreary, *CIPP/US, Chief Privacy Officer and Partner*,
Fox Rothschild LLP, Philadelphia, PA

Steven M. (Steve) Puiszis, *Deputy General Counsel and Privacy and Security Officer*, Hinshaw and Culbertson LLP, Chicago, IL

3:00 p.m.

Networking Break



Denotes the **DRI CLIENT CONNECTION**: In-house and claims professional speakers

3:15 p.m. **The Law Firm Culture**

The culture of a law firm is the glue that holds it together. It is the set of values by which it operates in relating to its employees and its clients, and indeed, in its very approach to the practice of law. Firm culture is critical to the hiring and retention of legal talent and in the day-to-day satisfaction and performance of employees. Yet few law firm leaders can readily define their firm's culture. And if they can't define it, there is no way to evaluate its effect or appropriateness, or most importantly, to determine what changes should be implemented or avoided. Join us for a fascinating panel discussion by law firm leaders recognized for maintaining a model law firm culture, to help you define your culture and whether it meets the needs and goals of your firm.

MODERATOR | **Stacy Linn Moon**, *Shareholder*, F&B Law Firm PC, Huntsville, AL

Jennifer Hines, *President*, Accelerated Sales & Leadership Institute Inc, Highland, IN

Thomas J. Hurney, Jr., *Partner*, Jackson Kelly PLLC, Charleston, WV

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

4:00 p.m. **Program Wrap-Up: Open Microphone**

Participants are encouraged to ask questions about topics or ideas presented during the day, as well as share successful past experiences and lessons learned as a managing partner or firm leader.

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

4:30 p.m. **Adjourn**

FACULTY

Click on any name to view bio.

Richard J. Cohen, Managing Partner,
Goldberg Segalla LLP, Buffalo, NY

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

John E. Cuttino, DRI Immediate Past President;
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➔ **Mark C. Fava**, Chief Counsel—Boeing
Commercial Airplanes, Boeing South Carolina,
North Charleston, SC

Tom Finke, Managing Director, West Region
Operations, Axiom Law, Chicago, IL

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Microsoft Corporation, Chicago, IL

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Thomas J. Hurney, Jr., Partner, Jackson Kelly PLLC,
Charleston, WV

William J. Josten, Manager, Strategy and
Performance, Thomson Reuters Legal
Executive Institute, Eagan, MN

➔ **Michael S. Kraft**, Founder and General Counsel,
Kraft & Kennedy Inc., New York, NY

John F. Kuppens, DRI President; Partner, Nelson
Mullins Riley & Scarborough LLP, Columbia, SC

Mark G. McCreary, CIPP/US, Chief Privacy Officer
and Partner, Fox Rothschild LLP, Philadelphia, PA

Amy L. Miletich, Managing Partner, Miletich PC,
Denver, CO

Katherine M. Miletich, Director of Marketing,
Vedder Price PC, Chicago, IL

Stacy Linn Moon, Shareholder, F&B Law Firm PC,
Huntsville, AL

Steven M. (Steve) Puiszis, Deputy General Counsel
and Privacy and Security Officer, Hinshaw and
Culbertson LLP, Chicago, IL

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McNulty Spaulding LLP, Philadelphia, PA

Marci Krufka Taylor, Founder, Mantra Partner LLC,
Sedona, AZ

➔ **Katina C. Thornock**, Director, Corporate Counsel,
Starbucks Coffee Company, Seattle, WA

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

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

Christopher T. (Chris) Wilson, Corporate and Finance
Partner, Taylor English Duma LLP, Atlanta, GA

➔ **Daniel A. Winkler**, Director—Claims Legal,
Westfield Insurance Company,
Westfield Center, OH

➔ **Michael D. Zeoli**, Vice President, Chubb,
New Haven, CT

**View faculty bios on the Managing Partners and
Law Firm Leaders Conference webpage; click on
“View speakers” button.**

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GENERAL INFORMATION

CLE Accreditation

This seminar has been approved for MCLE credit by the State Bar of California for up to **8.75** hours, including **0** hours of ethics credit. 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 8, 2018. (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 15, 2018** (*please allow 10 days for processing*). Registrations received after **August 15, 2018**, will be processed on-site. Open to Managing Partners and high-level decision-makers.

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 15, 2018**. Cancellations received after **August 15** and on or before **August 22, 2018**, will receive a refund, less a \$100 processing fee. Cancellations made after **August 22** 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**](mailto: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 **Loews Chicago Hotel, 455 North Park Drive, Chicago, IL 60611** ([click here](#) to view hotel photos).

Take advantage of the group rate of **\$239 Single/Double** in one of two ways:

- 1) Reserve online: [Click here](#) or visit [**dri.org**](http://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 312.840.6600** 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 8, 2018**, to be eligible for the group rate. Requests for reservations made after **August 8** are subject to room and rate availability.

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Employment and Labor Law

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June 14–15

Diversity for Success

Marriott Downtown

Magnificent Mile, Chicago, IL

June 20–22

Young Lawyers

Portland Marriott Downtown, Portland, OR

June 26–27

Marijuana Law

Gleacher Center, Chicago, IL

September 5–7

Cybersecurity and Data Privacy

Loews Chicago, Chicago, IL

September 13–14

Fire Science Litigation

Grand Hyatt Washington, Washington, DC

September 13–14

Nursing Home/ALF Litigation

Sheraton New Orleans, New Orleans, LA

November 8–9

Asbestos Medicine

Hilton Austin, Austin, TX

November 29–30

Insurance Coverage and Practice Symposium

Sheraton New York, New York, NY

November 29–30

Professional Liability

Sheraton New York, New York, NY



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.

Harassment and Discrimination

DRI is committed to the policy of equal opportunity regardless of race, color, religion, sex, sexual orientation, gender, national origin and disability in all of its programs and activities, as well as maintaining an environment in our programs and activities which is free from all forms of harassment or discrimination of any kind. Pursuant to this policy, if any person who attends our programs or activities experiences unlawful discrimination or harassment, this should be reported to the Executive Director so that appropriate action may be taken.

SEMINAR SPONSORS

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

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September 6-7, 2018
Loews Chicago Hotel
Chicago, IL

Register online

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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.

☐ Member/Nonmember

\$995

<input type="checkbox"/> Member/Nonmember	\$895	\$995
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PAYMENT METHOD

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