

# 2018 LMA Southwest Region Conference Agenda

## POWER OF THE PAST, FORCE OF THE FUTURE

### Wednesday, October 3rd

3:00 PM - 7:00 PM Registration Desk Open  
5:00 PM - 7:00 PM Welcome Reception

### Thursday, October 4th

7:00 AM - 7:00 PM Registration Desk Open  
7:30 AM - 8:30 AM Networking Breakfast  
8:30 AM - 8:45 AM Opening Remarks

8:45 AM - 9:30 AM

#### Keynote

**"Develop a Remarkable Brand - the Spotlight is on YOU!"**

Karen McCullough

Today the spotlight is on the individual and their personal brand – Personal branding is the #1 career and business strategy tool that can help put you in the spotlight. Strategic personal branding can advance your career, leadership development, and compensation opportunities. A strong personal brand will help you establish authentic relationships with key individuals in your organization. You will be recognized as a leader who can influence decisions. Learn how you can Do Better, Look Better, and Connect Better.

Karen McCullough knows branding, and she knows why great brands became great. She has worked for respected brands like Ralph Lauren, Coca Cola and P&G. Karen loves branding, and she wants to help YOU develop a remarkable personal brand.



9:30 AM - 10:00 AM Coffee Break with Sponsors

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## POWER OF THE PAST, FORCE OF THE FUTURE

Thursday, October 4th

10:00 AM - 12:00 PM

### Turning Millennial Lawyers into Marketing Ninjas

Morgan MacLeod | Cubicle Fugitive  
Lindsey Bombardier | Lenczner Slaght

As millennial lawyers look to take over from their boomer predecessors, they need new tools, tactics and information to build their books of business in the increasingly competitive and ever-evolving legal market. In this session, we'll walk you through results of our proprietary Millennial Attorney survey looking at who they are, what they want, need and really think about their firms. We'll also look at how this younger group of clients want to buy B2B services. You'll come away with invaluable information and the resources you need to guide these young lawyers and build a solid marketing plan that will withstand a disruptive market.

#### Key Takeaways:

- What millennial attorneys want in a law firm
- What they need from their firms to help market themselves
- Purchasing habits of millennial B2B buyers
- Generational differences in how buyers want to engage with their service providers
- The top-10 marketing techniques used by millennial attorneys and the top 10 marketing tactics with the greatest impact
- Generational differences in content and marketing preferences of millennials
- Increasing importance of client experience optimization

### If Communication is a Two-Way Street, Collaboration is a Construction Zone

Allen Fuqua | Winstead PC  
Marianne Lee | Winstead PC  
Jessica Brown | Winstead PC

Drawing on the perspectives of presenters from three different generations, this workshop will include discussion of how we define effective communication, how we define successful collaboration, and how the dynamics of a multi-generational workplace affects our efforts in both of those areas. Using worksheets, checklists, case studies, and group discussion, we will share proactive approaches to improve communication among your department and build collaboration into your team's routine.

#### Key Takeaways:

- Frameworks to use in defining department terminology and expectations
- Effective communication checklist
- How to build collaboration into the team's routine
- Tools to mitigate obstacles in collaboration
- Best practices to maximize the strength of a multi-generational workplace

12:00 PM - 1:00 PM Networking Lunch

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## POWER OF THE PAST, FORCE OF THE FUTURE

Thursday, October 4th

12:00 PM - 1:00 PM Networking Lunch

1:00 PM - 3:00 PM **Gender Differences, Implicit Gender Bias and Business Development: What the Marketing Professional Can DO**

Stewart Hirsch | Strategic Relationships LLC  
Caroline Turner | DifferenceWORKS, LLC  
Lori Armstrong Halber | Fisher & Phillips, LLP

Legal marketers, at all levels of experience, need knowledge and skills to be able to address the negative effects of implicit bias. These will support both their own personal effectiveness and their ability to help lawyers to appreciate the value of diversity and to leverage differences. Using tools from Caroline's book, Difference Works, and material from articles by Caroline and Stewart, this session will provide education and skills about:

- The business value of understanding and leveraging differences, including gender differences, in firm success and in pitching to and working with diverse clients
- Common forms of implicit bias and ways to counter them
- Practical ideas for how marketing professionals can reduce the negative business effects of implicit gender bias

The workshop will be interactive and will devote significant time to exercises that enable legal marketers to identify and share best practices for addressing implicit bias in themselves, in their professional lives, in their firms, and in business development efforts.

Key Takeaways:

This program applies concepts about implicit bias to the role of the legal marketer and business development. It focuses on practical solutions to an issue affecting firms and their clients. Participants will take away:

- Concepts that will help them identify implicit gender bias
- Ways to reduce implicit bias in their firms and to help lawyers they serve improve business development efforts with diverse clients and clients for which diversity is important
- Shared perspectives, best practices, and practical solutions gained from peers and facilitators

**Words Matter: Writing Web Site Copy That Gets Read**

Peter Feldman | Morning Light Marketing & Communications

Cecilia Linton | Linebarger Goggan Blair & Sampson, LLP

This workshop will provide practice and feedback in writing content for a variety of law firm web site applications, such as practice descriptions, attorney bios, case studies, client updates, blog posts, and more. Participants will have the opportunity to write content based on various scenarios.

The session will also cover some of the trends in law firm web sites as well as the challenges law firm marketers face in producing web content in-house, with opportunities for participants to share some of their challenges and get feedback from the group.

Key Takeaways:

- The trend is writing less but with greater impact
- Purpose and audience drive both content and style
- Law firm web content isn't just for other lawyers to read
- Write in a way that puts control of what they read in readers' hands
- A few grammar errors can cost you a prospective client
- There are resources available to help

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## POWER OF THE PAST, FORCE OF THE FUTURE

Thursday, October 4th

3:00 PM - 3:30 PM Afternoon Break with Sponsors

3:30 PM - 5:30 PM

### Planning for the Plan:

#### Advance Prep to Create a Stellar Marketing Plan

Vicki McCullough | Sequitur Marketing  
Clare Chachere | Slack Davis Sanger

As a legal marketing professional, creating a strong marketing plan is one of your many responsibilities. You want to produce a plan that positions your firm for success and gets the internal buy-in you need to properly execute. Developing this plan requires significant investment of time, thought, and creativity. What can you do to get the most from that investment? How do you prepare for the planning process? What sets the stage for commitment to the plan? Vicki McCullough and Clare Chachere will help you and your team organize and prepare to create a stellar marketing plan that is backed by the right people. "Plan for the planning" and bask in the results!

#### Key Takeaways:

- A marketing plan built on goals and strategy is valuable to the firm.
- The preparation you do before you begin writing your marketing plan pays off in the long-run. You'll produce a more effective marketing plan that also has buy-in from the right stakeholders.

#### Key advance planning tasks are:

- Setting expectations
- Building a team
- Defining process and time frame
- Collecting supporting materials
- Thinking ahead

### Personal Branding

Karen McCullough

Continue your personal branding journey with Karen McCullough in this interactive session where you will:

- Gain Self-awareness
- Grow your professionalism
- Discover how reputations are built
- Enhance your communication style
- Understand the foundation of trust
- Develop a consistent image
- Establish authentic relationships
- Gain confidence as well as humility

6:00 PM - 7:00 PM Networking Reception

7:00 PM - 9:00 PM Dinner

# 2018 LMA Southwest Region Conference Agenda

## POWER OF THE PAST, FORCE OF THE FUTURE

Friday, October 5th

7:00 AM - 3:30 PM Registration Desk Open

8:00 AM - 9:00 AM Networking Breakfast

9:45 AM - 10:15 AM **Procurement Panel**

*Moderator:*

Dwight Floyd | US Director of Pricing and Value at Eversheds Sutherland

*Panelists:*

Lisa J. Konie | Senior Director of Legal Operations at Adobe Systems

Mark Rogers | Senior Vice President, Asst. General Counsel, Asst. Secretary, & Asst. Compliance and Ethics Officer at ON Semiconductor

Bob Mignanelli | SVP/Associate General Counsel at Pearson plc

As our industry evolves and matures, the way in which legal services are purchased grows more sophisticated by the day. Our esteemed group of panelists will focus on how attorneys and business professionals at law firms can partner with in-house counsel and procurement experts to develop mutually beneficial relationships. Both sides need to commit to work on the relationship at all levels – partner to general counsel, billing person to billing person, business development team to operations team, etc. This panel will leave the audience with actionable solutions and new ideas to take back to their firms.

9:45 AM - 10:15 AM Coffee Break with Sponsors

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## POWER OF THE PAST, FORCE OF THE FUTURE

Friday, October 5th

10:15 AM - 12:15 PM

### How to Work a Room, Personally and Professionally

Erin Banks | Norton Rose Fulbright US LLP  
Carman Jackson | Akin Gump Strauss Hauer & Feld LLP

The right conference or networking event can be a game changer for your business. Whether you are going to a trade show, festival, or business conference, you have to be prepared. You are already spending time, money, and energy to get to your event. Separately, networking can be a life- or career-saver in times of need. We all need mentors, cheerleaders, and referrals for last-minute family emergencies.

This session will be a "train the trainer" concept for taking best practices back to your firm on professional networking for lawyers, as well as a session on developing networking skills for the legal marketer's career and personal life.

The session will include a high-level review of networking basics, an interactive mock-networking session, and a discussion of the successes and challenges uncovered by attendees. The session will conclude with networking tips and best practices showcasing how a well-developed network can enrich both our personal and professional lives.

#### Key Takeaways:

- Learn interpersonal networking skills to further personal and professional goals
- Learn how to conduct a networking training session at your own law firm with provided take home materials

### Running Your Department Like a Business: Creating an Offensive Playbook

Jen Scalzi | Calibrate Legal, Inc.  
Gordon Braun-Woodbury | Calibrate Legal, Inc.

Research shows that today's marketing and BD departments are not equipped to keep pace with the demands and expectations that will be imposed on them in the next chapter of our industry. In a data-driven world where more and more questions are being asked about return on marketing investment, the onus is on you to prove your value. Running your department like a business can meet that need, but it requires leaders and M/BD teams to re-evaluate how they manage and report on their work. Ensure your department is ready to tackle what's ahead by preparing an offensive playbook that will align your team's activities with the firm's overall strategic objectives, add quantifiable value, and serve as a model of operational excellence to other departments. This program will identify where to begin and the tools you'll need to reach success.

Our co-presenters, Gordon Braun-Woodbury and Jennifer Scalzi will each bring a different perspective to their presentation, both generationally and as subject matter experts. Similar to the CIO/CMO relationship, Gordon will discuss the logistics and application of running a marketing/BD department like a business, while Jennifer will address real-time challenges facing those who are tasked with adoption and implementation.

#### Key Takeaway:

Business services departments can be revenue generators and not cost centers if we approach the work differently.

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## POWER OF THE PAST, FORCE OF THE FUTURE

Friday, October 5th

12:15 PM - 1:15 PM Networking Lunch

1:15 PM - 3:15 PM **Business Continuity: Moving Beyond Succession Planning with a Client-Centric Approach**

Tasneem Khokha | GrowthPlay  
Holly Barocio | GrowthPlay

For years, industry research has noted that the retirement or departure of a primary relationship attorney is one of the leading reasons that law firms lose key client relationships. And yet, most law firms continue to struggle with how to introduce new talent into client relationships in order to protect their business from client attrition.

Traditional approaches to law firm succession planning have proven woefully inadequate for one reason: they focus on what's good for the firm, i.e. finding ways to transition business from retiring or departing attorneys to others within the firm. The business continuity approach, in contrast, focuses on what is good for the client, i.e. having multiple resources within outside counsel firms who collectively elevate the level of service and quality of outcomes delivered.

Key Takeaways:

- Understand the distinctions between succession planning and business continuity
- Create an approach to business continuity that is focused on the client's best interests
- Develop a practical plan for implementing client centric business continuity in their own firms

3:15 PM - 3:30 PM Closing Remarks  
Raffle Prize Drawings

**Robots Need Not Apply: How Empowered Marketers Put the AI into Effective TrAlning**

Drew Sammeth | LexisNexis  
Elena Cutri | LexisNexis

Getting user buy-in remains one of the highest barriers to successfully implementing a new program or technology for legal marketing and business development teams, but the role of the marketing or BD has the potential to drive successful end-user adoption.

In this highly-interactive discussion, participants will learn how to effectively utilize AI-type techniques to advance their projects, and how leading large and mid-sized law firms use artificial intelligence to increase the ROI on their BD efforts.

Key Takeaways:

- 3 ways to be an advocate for marketing technology
- 3 actionable items emphasizing marketing thought leadership in marketing technology
- 3 'must-have' phases of successful end-user adoption
- 1 absolute best practice on making AI work for you