



# LEGAL MARKETING AND BUSINESS DEVELOPMENT

Lessons Learned and Proven Methods for  
Success in 2006 and Beyond

September 26-28, 2006

3 West Club, New York, NY

## This Event Will Cover:

- Maximizing revenue through proper business planning
- Successful strategies employed by other professional service industries
- Leveraging technology to market growth and manage change
- Techniques for selling legal services and getting lawyers to sell externally
- Client retention and using your existing clients as a source of new clients
- Measuring ROI, sales force efforts, and client satisfaction

## Hear From:

**Akin Gump Strauss  
Hauer & Feld LLP**

**Alvarez & Marsal**

**Baker Hostetler**

**BTI Consulting  
Group**

**Bullivant Houser  
Bailey PC**

**Dickstein Shapiro  
Morin & Oshinsky  
LLP**

**Dorsey Whitney LLP**

**Edwards Angell  
Palmer Dodge LLP**

**Foley & Lardner LLP**

**Greenfield/Belser Ltd.**

**King & Spalding**

**Larry Bodine  
Marketing**

**Latham & Watkins**

**Levick Strategic  
Communications**

**Patton Boggs, LLP**

**Reed Smith LLP**

**Ropes & Gray**

**Sachnoff &  
Weaver, LTD**

**TARP**

**Vault Inc.**

**Wharton of  
University of  
Pennsylvania**

**Williams Lea**

**Womble Carlyle**

**Zeughauser  
Group**

The first 20 people to register will receive a copy of

***Creating Rainmakers:  
The Manager's Guide To  
Training Professionals To  
Attract New Clients*** (Paperback)

by Ford Harding



Supporting Organization:



[www.iqpc.com/legalIQ](http://www.iqpc.com/legalIQ)

# LEGAL MARKETING AND BUSINESS DEVELOPMENT

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## Who Should Attend

- Chief Marketing Officers
- Chief Business Development Officers
- Chief Executive Officers
- Directors of Marketing
- Directors of Development
- Directors of Client Development
- Directors of Business Development
- Directors of Sales
- Managing Partners
- Executive Partners
- Legal Marketing Consultants

**and anyone else who wants to increase revenue at their law firm!**

Dear Executive,

According to an exclusive study with more than 1000 corporate counsel, The BTI Consulting Group (Boston, MA) found just 30.7 percent of large and Fortune 1000 companies recommend their primary law firms. In addition, BTI research shows more than 50 percent of clients reported they plan to try at least one new law firm for substantive matters in 2006. BTI also found that spending on outside counsel has climbed 15.8 percent.

The proof is in the numbers and these numbers show that successful marketing and business development in law firms is more important than ever. Clearly there is an opportunity for smart law firms to market themselves and get new clients. Law firms also need to increase customer satisfaction, client retention rates and ultimately bottom line results.

Proof is one of the most important aspects of legal marketing and business development. For this reason we have gathered leading experts who can quantify their work as well as discuss strategies to succeed in 2006 and beyond. Our distinguished speaker faculty - law firms, academics, other professional services, and legal consultants will demonstrate how to:

- Implement measurements
- Maximize revenue
- Leverage technology
- Attract and retain clients
- Sell your program internally

Attend this event and you will leave with the knowledge of what really works and what will make you more successful.

I look forward to seeing you in New York!



Jill Fridley  
Conference Director, Legal IQ

*P.S. Don't miss the panel session on Sales focus and metrics led by speakers from three prominent law firms! See page 3*

## About the Organizers



Legal IQ, a division of IQPC, is dedicated to providing practical, detailed information through educational conferences held at the national level. International Quality & Productivity Center ([www.iqpc.com](http://www.iqpc.com)) provides millions of business executives with tailored, practical conferences, keeping them up-to-date with industry trends, technological developments and the regulatory landscape. Last year alone, IQPC produced more than 1,200 events, and we continue to grow. Founded in 1973, IQPC now has offices across five continents around the world.

## LEGAL IQ WOULD LIKE TO HEAR FROM YOU

Legal IQ is looking to expand its course offerings. Do YOU have an interesting "story to tell" or a "hot" conference topic idea? If so, please send a short e-mail to [Lisa.Schulman@iqpc.com](mailto:Lisa.Schulman@iqpc.com).

# MAIN CONFERENCE SESSIONS • DAY ONE

Wednesday, September 27, 2006

7:30  
**Breakfast and Registration**

8:00  
**Chairperson's Opening Remarks**

8:10  
**Strategic vs. Tactical Business Planning**

Business planning has become increasingly critical at law firms and marketing executives must play a key role in educating Department Chairs, Practice Leaders and individual attorneys about the fundamentals of planning at each level. Marketing must help define strategy, set direction, and implement the plan. We will discuss approaches for adding value during the planning process as it relates to market research & competitive analysis, operations, financial projections, recruiting, budgeting and marketing.

**Geetha Cherukuri**  
Associate Director, Marketing & Business Planning  
FOLEY & LARDNER LLP

**Sharon Barner**  
Chair, Intellectual Property Department  
FOLEY & LARDNER LLP

9:00  
**What is Great "Lawyering" and How do You Get Lawyers in the Firm to Do It?**

This session will focus on getting lawyers to be great lawyers, which, according to Jim, is the best form of business development. Topics will include: setting the stage for greatness, common characteristics of great lawyers, and understanding how to get the lawyers to be great.

**James Durham, Chief Marketing Officer**  
ROPES & GRAY

9:50 **Mid-morning refreshments**

10:10  
**Proof – A Consultants' Panel**

This session will overview measurements for the effectiveness of marketing and business development. Leaders in the legal marketing industry will present research findings which show what works and what doesn't.

- Michael Rynowecer/BTI: quantifying the successful strategic and tactical applications that the most successful firms have used.
- Richard Levick/Levick Strategic Communications: distinguishing between a successful PR program and one that fails
- Jolene Overbeck/Zeughauser Group: creating business development tactics for winning business
- Jeffrey Morgan, Greenfield/Belser: insight in the latest trends in legal branding that supports business development as well forecasts for the future of legal and professional service marketing.

*Our panel moderator, David Geyer, will also lead an extended Q&A session.*

**David Geyer – Moderator**  
Chief Marketing Officer  
BAKER HOSTETLER

**Richard Levick**  
President  
LEVICK STRATEGIC  
COMMUNICATIONS

**Michael Rynowecer**  
President  
BTI CONSULTING GROUP

**Jolene Overbeck**  
ZEUGHAUSER GROUP

**Jeffrey Morgan**  
Principal  
GREENFIELD BELSER LTD.

11:10  
**Sales Focus and Metrics**

Is it better to spend your time working with a small handful of lawyers who "get it," or to develop a firm wide sales culture? Better to focus on coaching lawyers or on strategic targeted company opportunities? Depending on which way you go, how do you do so and how do you measure your success? What about non-lawyers going out on sales calls? Does it work? If so, when? With the lawyers or solo?

**Kelvin H. Chin**  
Chief Client  
Development Officer  
EDWARDS ANGELL PALMER  
& DODGE LLP

**Daryle Bost**  
Sales Director  
WOMBLE CARLYLE

**Adam Severson**  
Director of Sales  
DORSEY WHITNEY LLP

12:10 **Luncheon for delegates and speakers**

1:15  
**Reed Smith University Business Development School—A Ground-Breaking Management Program**

This presentation will serve as a case study on the management program set up by Reed Smith LLP, which is the first of its kind, formed in partnership with the Wharton School of the University of Pennsylvania. The School of Business Development seeks to instill the discipline as a core part of the Reed Smith culture beginning with first year associates. This presentation will cover the design of the Reed Smith University Business Development curriculum, including an outline of the progression from a basic networking course through personal marketing planning to a mock client pitch competition.

**David Egan**  
Chief Marketing Officer  
REED SMITH LLP

2:05  
**Pursuit Tracking and Commitment to the Marketing Team**

This case study will address pursuit tracking and other key marketing initiatives.

- Keeping attorneys in front of clients and prospects
- Industry driven marketing and business development efforts
- Formation of client service teams
- Pursuit tracking software
- Gathering client feedback
- Tracking attorney sales efforts with a pipeline management
- Cross selling opportunities

**Adam Stock**  
Chief Marketing and Sales Officer  
DORSEY & WHITNEY

2:55 **Mid-afternoon Refreshments**

3:25  
**Client Service and Teamwork**

This presentation will address practical ways to implement client teams including actual case studies.

**Iris Jones, Esq.**  
Client Services Advisor  
AKIN GUMP STRAUSS HAUER & FELD LLP

**Bruce Rosen**  
Counsel  
AKIN GUMP STRAUSS HAUER & FELD LLP

4:10  
**How to Sell Legal Services Like a Rainmaker**

- The 5 biggest attorney selling mistakes
- The secret to selling: get the focus off the firm, the practice group, yourself and what you have to sell
- 5 simple rules for selling success

**Larry Bodine**  
Strategic Marketing Consultant  
LARRY BODINE MARKETING

5:00 **Surveys and Directories**

Surveys and directories can play a vital role in marketing your law firm, but with so many how can you be strategic about choosing the right ones. This panel session will cover the pros and cons of participating in surveys and directories, the best lists and how to get on them and most importantly—what surveys do corporate counsel pay attention to.

**Samer Hamadeh**  
Co-founder & CEO  
VAULT INC.

5:45  
**Day One Concludes**

# MAIN CONFERENCE SESSIONS • DAY TWO

Thursday, September 28, 2006

7:45

## Breakfast

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8:00

## Chairperson's Opening Remarks

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8:10

## Client Retention and Using Your Existing Clients as a Source of New Clients

It is much easier to get more business from existing clients instead of finding new clients – especially if the existing client is delighted and refers additional clients to you. How do you organize your service strategy, set priorities for improvement, gain support from the CFO for investments in service and then track if your strategy is working. John Goodman will present best practices for client service and Voice of the Customer processes based on data from his studies on client retention.

**John Goodman**  
Vice Chairman  
TARP

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9:00

## Benchmarking—Lessons from the Outside

This session will benchmark marketing and business development practices at other professional services firms. Find out what works, what doesn't and why.

**Despina Kartson—Moderator**      **Patrick Fogarty**  
Chief Marketing Officer              VP Business Development  
LATHAM & WATKINS                  WILLIAMS LEA

**Rebecca Baker**  
Chief Marketing Officer  
ALVAREZ & MARSAL

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10:15

## Mid-Morning Refreshments

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10:40

## Measuring Client Satisfaction

This session will begin with Dr. Iacobucci discussing the differences between marketing goods and services, and in particular, professional services--the intangibility of services, the heterogeneity, and the simultaneous production consumption (i.e., what are these concepts and why do they matter). Finally, every marketer is being held fiscally accountable for their actions, yet marketing results are difficult to measure. Dr. Iacobucci will also discuss indexing customer satisfaction.

**Dawn Iacobucci, PhD**  
Professor in Professional Services Marketing  
WHARTON OF UNIVERSITY OF PENNSYLVANIA

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11:30

## Achieving Diversity

Diversity is incredibly important and corporate counsel is increasingly demanding that firms increase diversity at firms. The question now becomes how do you achieve diversity within your firm? How do you compete with all the other firms that are competing for the same candidates? What are some strategies to increase diversity and what is corporate counsel looking for when it comes to diversity?

**C. Elaine Arabatzis**                      **Dean Harakas**  
Diversity/Pro Bono Counsel              VP Client Services and  
DICKSTEIN SHAPIRO MORIN &      Strategic Planning  
OSHINSKY LLP                              SACHNOFF & WEAVER, LTD

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12:15

## Selling Your Program Internally

Internally there are two audiences: the management of the firm and the individual attorneys at the firm. This presentation will focus on the keys to selling business development to these audiences as well as the aspects of a good business development program in a law firm including: proposal preparation, pricing guidance, client research, working with the marketing department, coaching, management of outside consultants and other important aspects.

**Mark D. Cowan**  
Partner  
PATTON BOGGS, LLP

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1:00

## Luncheon For Delegates And Speakers

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2:05

## Using Technology to Market Growth and Manage Change

In a large firm, getting your lawyers organized and enabling them to communicate as a team delivers a huge marketplace advantage. Doug Davis, CMO at Bullivant Houser Bailey will reveal how marketing professionals can use websites, CRM, and other web-based tools to leverage their firm's full marketing potential, particularly as firms add new personnel and new geographic markets through mergers. This session will also include advise on how develop new technology initiatives and sell the budget and the concept to firm leadership. Technology is not just for the IT department anymore.

**Douglas Davis**  
Chief Marketing Officer  
BULLIVANT HOUSER BAILEY PC

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3:00

## Creating Powerful Brand Messages

This session will describe the challenges in re-enforcing and articulating the brand of a law firm. Using case studies that give insight into how other law firms have done it, and referencing research that reveals how lawyers are different from the rest of the world, you will learn how to maximize buy-in, make your brand stronger and ensure that you end up with a compelling message clients and attorneys alike.

**Katherine D'Urso**  
Chief Marketing Officer  
KING AND SPALDING

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3:55

## And the Survey Says – How Corporate Counsel Hire and Fire Their Law Firm

Michael Rynowecer, President of The BTI Consulting Group (Boston, MA) will be presenting results from BTI's recent survey of more than 250 corporate counsel. Michael will focus on how clients define client service, how law firms stack up and delineate how clients hire law firms. This fact filled, interactive presentation is based on client research and is proven to a key toll for law firms to boost client retention and while enjoying better rates.

**Michael Rynowecer**  
President  
BTI CONSULTING

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4:45

## Day Two Concludes

# PRE-CONFERENCE WORKSHOPS

Tuesday, September 26, 2006

**A** 9:00 am - 12:00 pm

## Proving ROI on Marketing by Measuring Marketing Effectiveness

You don't want to miss this in-depth workshop on measuring ROI based on the six month study of 377 marketing professionals on proving results and identifying the most effective techniques. By participating you will learn about specific data about the highest ranked marketing and business development practices, the most effective measurement metrics, how firms monitor their effectiveness, how they perceive they are doing in measuring their marketing and business development initiatives, and how they are overcoming obstacles.

**At the end of the program each delegate will know:**

- Key Client Metrics
- Obstacles to proving ROI and how to overcome them
- Five essential roles for legal marketing professionals

**Larry Bodine**  
Strategic Marketing Consultant  
Larry Bodine Marketing

**Suzanne Lowe**  
President  
Expertise Marketing LLC

**B** 1:00 pm - 5:00 pm (*Working lunch will be included*)

## Creating Rainmakers-Turning Attorneys into Client Getters

Developing future leadership with client-getting skills is not only one of the most important issues a firm faces, but also one of the most difficult. A firm's success in this area will affect its future growth rate, its profitability, its management succession and even its survival. Firm management has a role to play in this development. What is it?

This session will explore ways that firms can help turn their attorneys into client-getters. This highly interactive session will present three or four situations commonly faced by the management of law firms. These situations have major implications for the development of future leadership. They include such situations as:

- Dealing with the staff resistance to developing business
- Advising a young, high-potential associate on how to get started at bringing in new business
- Managing a handoff of relationship from a retiring attorney to others in the firm.

Don't miss this highly informative, interactive workshop. Growth, leadership succession, firm profitability, and work quality all depend on the development of attorneys' rainmaking skills!

**Ford Harding, President**  
Harding & Company

**Author, *Creating Rainmakers: The Manager's Guide to Training Professionals to Attract New Clients* (Wiley, 2006).**

## Sponsorship and Exhibition Opportunities

Sponsorships and Exhibits are excellent opportunities for your company to showcase its products and services to high-level, targeted decision makers attending the Legal Marketing And Business Development event. Legal IQ and Legal Marketing And Business Development helps companies like yours achieve sales, marketing and branding objectives by setting aside a limited number of event sponsorships and exhibit spaces – all of which are custom-tailored to help your company create a platform to maximize its exposure at the event.

For more information on Sponsoring or Exhibiting at this event, please contact **Shannon Forrester** at **212-885-2719** or via email at **sponsorship@iqpc.com**.

## Register Online, by Email, Phone, Fax or Mail

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**Fax:** 973-256-0205 24 Hours A Day

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**3 Fax:** 1-973-256-0205

**4 Mail:** International Quality & Productivity Center  
555 Route 1 South, Iselin, NJ 08830

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