

Managing Partners and Law Firm Leaders Conference



September 5–6, 2019

Grand Hyatt Denver

Denver, CO

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 future law firm leaders. The keynote address will be by Craig A. Thompson, a partner at Venable LLP, who has more than two decades of experience handling civil cases in federal and state courts. He represents clients in the areas of commercial litigation, product liability, premises liability, and personal injury. Mr. Thompson also is active in leading law firm inclusion and diversity initiatives, and served for five years as chair of Venable's Diversity Committee. He will share his unique insight about law firm leadership and the tools necessary to lead in today's challenging legal environment.

Join us in the Mile High City for a high-value experience with those who most clearly understand your challenges and are, therefore, best able to provide you with solutions.



James (Jay) R. 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.



What You Will Learn

- 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 financial metrics
- Learn and apply new management 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:



DRI networking. At your fingertips!

NEW! Member exclusive



Lawyer-to-lawyer connections happen within **dri circles**.

- Refer and track referrals to fellow members
- Schedule meetings
- Send messages
- Join dri social circles of interest
- Create professional circles to facilitate business development
- Video conference call functionality

Search **dri circles** in your app store



THURSDAY, SEPTEMBER 5

Click on any speaker name to view bio.

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

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

Toyja E. Kelley, *DRI President, Partner*, Saul Ewing Arnstein Lehr LLP, Baltimore, MD

1:15 p.m. **How Clients Select (and Why They Keep Using)
Outside Counsel: Guidance for Law Firms**

What are clients looking for when they retain outside counsel? What weight do they give to issues like expertise, trial experience, hourly rates, breadth and depth, technological capability, and other factors? Once retained, what tools do clients use to evaluate their outside counsel? What tools and resources are available to law firms to better serve clients? What is the best way to sustain a long-term relationship with a client? We will have a facilitated discussion of these questions and learn strategies for working cooperatively and effectively to meet client needs.

MODERATOR | **John F. Kuppens**, *Partner*, Nelson Mullins, Columbia, SC

Claire Eagan, *Senior Counsel*, Uber Technologies Inc., Chicago, IL

Mark A. Rowe, *General Counsel & Chief Compliance*, Techtronic Industries Power Equipment, Anderson, SC

2:15 p.m. **Mastering the Art of Firm Finances: A Practical Guide to
Analyzing Financial Statements and Identifying Key Ratios**

Law firm financial statements offer a broad spectrum of information regarding the firm. The trick is in understanding how to extract information from them in a useful fashion. This session will provide insight and instruction in techniques for condensing financial reports into smaller, easily understandable metrics that can be used to analyze financial performance across time, against budgeted operations, and against other entities. Improve your skills in interpreting financial statements, setting benchmarks, identifying potential problems, and measuring success. The mastery of understanding firm finances is essential for both current and future law firm leaders, and this session will help provide discussion points and understanding for both levels.

Holly Sharp, *Director of Consulting*, LaPorte CPAs & Business Advisors, Metairie, LA

Brian Kennel, *CEO and Lead Consultant*, PerformLaw, New Orleans, LA

3:15 p.m. **Networking Break**

3:45 p.m.

Swimming Upstream: Economic and Business Challenges Facing Today's Defense Firms

Once a steady and predictable career path, the defense practice is facing challenges like never before. Between alternative dispute resolution, staff counsel, rate pressure, audits, legal disruptors and increasing administrative costs, defense firms are struggling to remain economically viable. Further, the challenge to hire and retain top talent has become increasingly difficult. The reality is that many defense firms and especially those that represent the insurance industry are being seen as second-tier firms. What can today's defense firms do to prepare for the future? What can clients and carriers do to make sure that good lawyers remain committed to the practice? Individually, what can firms do to stand out among their peers? Can defense firms adapt and become more successful through the use of alternative fee arrangements, third-party vendors, efficiency and/or win bonuses, or other departures from the traditional billable hour and business model?

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

5:00 p.m.

Adjourn

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

FRIDAY, SEPTEMBER 6

7:45 a.m.

Networking Breakfast Coffee and Continental Breakfast

8:30 a.m.

Keynote: Leadership Speaker

Craig A. Thompson, *Partner*, Venable LLP, Baltimore, MD

9:30 a.m.

Beyond Management: Daring to Lead

The term “managing partner” does not fully encompass what firm leaders must do to adapt to a changing legal marketplace and to attract talent. Firm leaders must understand and manage the world of social media, the basics of technology, the complexities of cybersecurity, the delicacy of intergenerational communication, and a myriad of diverse world views among clients and employees alike. Most importantly, firm leaders must look to the future and persuade firm members to do the same, while at the same time identify and encourage others to become the next generation of leaders. In this discussion, we will expand upon the themes presented by keynote speaker Craig Thompson and gain valuable insight from firm leaders of different backgrounds and skill-sets whose daily challenge is to balance the

practical with the visionary, to inspire with a steady hand, and even to sometimes practice law.

MODERATOR | **Marc E. Williams**, *Managing Partner*, Nelson Mullins, Huntington, WV

Amy L. Miletich, *Shareholder*, Miletich PC, Denver, CO

Craig A. Thompson, *Partner*, Venable LLP, Baltimore, MD

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

11:00 a.m. **Transparent Management: A Key to Hiring and Keeping Lawyers in These Changing Times**

Successful lawyers and firms know that one key to continued financial success and to retaining lawyers is effective mentoring and coaching. However, smart firm leaders are increasingly learning that transparent management is a critical component that firms must adopt. This session will define what “transparent management” means and offer practical tips about how to attain transparency in a profession that has long been known for secrecy. More importantly, you will hear *why* transparency is so critical to hiring and keeping younger lawyers, women, and diverse individuals.

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

Thomas J. Hurney, *Member*, Jackson Kelly PLLC, Charleston, WV

Marta-Ann Schnabel, *Managing Director*, O'Bryon & Schnabel PLC, New Orleans, LA

12:00 p.m. **Lunch (onsite)**

1:15 p.m. **Women and Diversity Leadership: Building and Sustaining Diversity Excellence**

Diversity in law firms is not more critical now than before. It has always been critical. It's just that we are now only starting to realize diversity's value in the workplace. Diverse law firms not only perform better, but clients are expecting diverse teams to service their legal needs. Join the discussion with diverse law firm leaders and an award winning entrepreneur and author about how women and diversity leaders in law firms can drive a better return on equity by creating balance within the firm and identifying, developing, mentoring, and retaining diverse talent.

MODERATOR | **Lana A. Olson**, *Partner*, Lightfoot, Birmingham, AL

Diane Fleming Averell, *Principal*, Porzio Bromberg & Newman PC, Morristown, NJ

Tojya E. Kelley, *DRI President, Partner*, Saul Ewing Arnstein Lehr LLP, Baltimore, MD

Benjamin F. Wilson, *Chairman*, Beveridge & Diamond PC, Washington, DC

2:15 p.m.

Brand Strategy in Today's Legal Market

In today's world of commoditization and price competition, firms with an effective brand strategy have a distinct competitive advantage. While brand differentiation is challenging for law firms, those that create authentic, memorable brands succeed where others fall short. In this thought-provoking program, legal strategy and marketing consultant Marci Krufka Taylor will discuss how to invest strategically to create an authentic brand and a client experience that increases client satisfaction, loyalty and profitability.

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

3:15 p.m.

Networking Break

3:45 p.m.

Breaching Bad: How Law Firm Leaders Can Protect Their Firms from Cyber Breaches

With data being any law firm's most valuable asset, digital security is a top priority. During this session, you will learn how security assessments are conducted to establish baselines, how vulnerabilities can be identified, and what solutions are available for ongoing improvement. One of the nation's leading experts in cybersecurity will share simple steps that law firm leaders can take to protect against data privacy violations.

Mark Lanterman, *Chief Technology Officer*, Computer Forensic Services, Minneapolis, MN

Joy Heath Rush, *Chief Executive Officer*, The International Legal Technology Association, Chicago, IL

4:45 p.m.

Program Wrap-Up: Open Microphone

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

5:00 p.m.

Adjourn



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.

FACULTY

Click on any name to view bio.

Diane Fleming Averell, Principal, Porzio Bromberg & Newman PC, Morristown, NJ

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

Claire Eagan, Senior Counsel, Uber Technologies Inc., Chicago, IL

Thomas J. Hurney, Member, Jackson Kelly PLLC, Charleston, WV

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

Toyja E. Kelley, DRI President, Partner, Saul Ewing Arnstein Lehr LLP, Baltimore, MD

Brian Kennel, CEO and Lead Consultant, PerformLaw, New Orleans, LA

John F. Kuppens, Partner, Nelson Mullins, Columbia, SC

Mark Lanterman, Chief Technology Officer, Computer Forensic Services, Minneapolis, MN

Amy L. Miletich, Shareholder, Miletich PC, Denver, CO

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

Lana A. Olson, Partner, Lightfoot, Birmingham, AL

Mark A. Rowe, General Counsel & Chief Compliance, Techtronic Industries Power Equipment, Anderson, SC

Joy Heath Rush, Chief Executive Officer, The International Legal Technology Association, Chicago, IL

Marta-Ann Schnabel, Managing Director, O'Bryon & Schnabel PLC, New Orleans, LA

Holly Sharp, Director of Consulting, LaPorte CPAs & Business Advisors, Metairie, LA

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

Craig A. Thompson, Partner, Venable LLP, Baltimore, MD

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

Marc E. Williams, Managing Partner, Nelson Mullins, Huntington, WV

Benjamin F. Wilson, Chairman, Beveridge & Diamond PC, Washington, DC

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 **7.25** 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 14, 2019**. (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 14, 2019** (*please allow 10 days for processing*). Registrations received after **August 14, 2019**, 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 14, 2019**. Cancellations received after **August 14** and on or before **August 21, 2019**, will receive a refund, less a \$100 processing fee. Cancellations made after **August 21** 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 **Grand Hyatt Denver, 1750 Welton Street, Denver, CO 80202** ([click here](#) to view hotel photos).

Take advantage of the group rate of **\$229 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 303.295.1234** 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 14, 2019**, to be eligible for the group rate. Requests for reservations made after **August 14** are subject to room and rate availability.

CLE for Your Practice

**View all
Continuing
Legal
Education
offerings**

June 5–7
**Insurance Bad Faith and
Extra-Contractual Liability**
Westin Washington, D.C.
City Center, Washington, DC

June 20–21
Diversity for Success
Sheraton New Orleans, New Orleans, LA

June 26
Trucking Law Primer
Hilton Nashville Downtown, Nashville, TN

June 26–28
Young Lawyers
Hilton Nashville Downtown, Nashville, TN

July 19
Appellate Advocacy
Loews Chicago, Chicago, IL

September 12–13
Strictly Automotive
*S-E-A/Sheraton Columbus at
Capitol Square, Columbus, OH*

September 19–20
Nursing Home/ALF Litigation
Hyatt Regency Chicago, Chicago, IL

September 19–20
Talc Litigation
*JW Marriott Washington, D.C.,
Washington, DC*

October 16–19
Annual Meeting
New Orleans Marriott, New Orleans, LA

November 14–15
Defense Lawyers Asbestos Symposium
Westin Boston Waterfront, Boston, MA

November 14–15
Asbestos Medicine
Westin Boston Waterfront, Boston, MA

December 5–6
**Insurance Coverage and
Practice Symposium**
*Sheraton New York Times
Square Hotel, New York, NY*

December 5–6
Professional Liability
*Sheraton New York Times
Square Hotel, New York, NY*



SEMINAR SPONSORS

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

SILVER SPONSORS



Managing Partners and Law Firm Leaders Conference

September 5-6, 2019
Grand Hyatt Denver
Denver, CO

Register online

**Download form
to fax or mail**

TITL F

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

COMPANY/FIRM/LAW SCHOOL

ADDRESS

ZIP/POST CODE

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.

After
Aug. 14, 2019

<input type="checkbox"/> Member	\$895	\$995
<input type="checkbox"/> Nonmember	\$995	\$1,095

PAYMENT METHOD

☐ My check for _____ (USD) is enclosed.

☐ Please charge my ☐ VISA ☐ MasterCard ☐ American Express.

3400-0185-21
Managing Partners

2019-0185B

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

PHONE: 312.795.1101 | FAX: 312.795.0749 | EMAIL: seminars@dri.org | WEB: dri.org