

# The 21<sup>st</sup> Annual Law Firm COO & CFO Forum



Point Break: Growth & the New Economics of Success

27-28 OCTOBER 2022 • THE NEW YORK MARRIOTT DOWNTOWN, NEW YORK, NY

## Agenda

### DAY ONE

THURSDAY, 27 OCTOBER 2022

8:00AM-9:00AM ET	<b>Breakfast &amp; Registration</b> <i>Breakfast sponsored by RSM US LLP</i>	<i>Grand Ballroom Foyer – Floor 3</i>
		
9:00AM-9:15AM ET	<b>Opening Remarks</b>	<i>Grand Ballroom – Floor 3</i>
9:15AM-10:30AM ET	<b>The State of the US Legal Market</b> 2021 was another record year for law firms. Yet despite unprecedented demand and growth rates not seen in over a decade, firms found themselves entangled in an escalating talent war, all while balancing higher expenses with evolving client needs. Given the cautious optimism over COVID-19's ebb, what might the current and forthcoming year hold for legal professionals? What opportunities exist within key sectors or practice areas? Should law firms expect another banner year or be prepared for modest returns? Join us for our annual, data-driven examination of key trends and headwinds impacting legal services.  Presenters: <b>James Jones</b> , <i>Senior Fellow, Center on Ethics and the Legal Profession, Georgetown University Law Center</i> <b>Gretta Rusanow</b> , <i>Head of Advisory Services, Law Firm Group, Citi Private Bank</i>	<i>Grand Ballroom – Floor 3</i>
10:30AM- 10:45AM ET	<b>Morning Break</b> <i>Sponsored by Frontline Managed Services</i>	<i>Grand Ballroom Foyer – Floor 3</i>
		
10:45AM- 12:00PM ET	<b>Thursday Keynote:</b> <b>Nervous Conditions: Stress &amp; Demand in the Global Economy</b> For all the optimism of 2022 economic forecasts, evolving supply chain issues, persistent inflation, market volatility, and even the impact of financial sanctions on Russia have ostensibly derailed short-term momentum heading into 2023. On the eve of the US midterm elections, what is one to make of the overall health of the domestic and global economy? What impact will shifting attitudes toward public health and hybrid work	<i>Grand Ballroom – Floor 3</i>

arrangements have on US GDP and global growth? This keynote welcomes expert economists in a roundtable exploration of key economic drivers and potential storm clouds with significant, far-reaching implications.

Moderator:

**Axel Threlfall**, *Editor at Large*, Reuters

Panelists:

**Kevin Depew**, *Deputy Chief Economist & Industry Analyst Program Leader*, RSM US LLP

**Dr. Caroline Freund**, *Dean*, UC San Diego School of Global Policy & Strategy & *Nonresident Senior Fellow*, Peterson Institute for International Economics

**Dr. Michael Strain**, *Arthur F. Burns Scholar in Political Economy & Director of Economic Policy Studies*, American Enterprise Institute

**Steven Wieting**, *Chief Investment Strategist & Chief Economist*, Citi Global Wealth

**12:00PM-1:00PM** **Networking Luncheon**  
ET Sponsored by Epiq

*Grand Ballroom Foyer –  
Floor 3*



**1:00PM-2:15PM**  
ET

Breakout Sessions

*In these facilitated breakouts, Forum participants will have the opportunity to share practical ideas with leading firms and industry peers.*

**Breakout #1**

**New Sculptures in the Sandbox: Assessing Alternative Business Ownership Models in Legal Services**

Given the accelerating number of so-termed “alternative business structures” outside the United States, the national debate over (inevitable) industry transformation continues to crest. Utah, Arizona, and California are actively exploring or have formally recognized an initial spate of non-traditional providers. And while, in the words of the Utah Supreme Court, a regulatory sandbox offers an admirable approach to curtailing the access to justice “crisis,” broader, state-level resistance toward abolishing ABA Rule 5.4 suggests ominous pitfalls for wider adoption. This session delivers an earnest inquiry into the viability, practicality, and future of alternative business structures. Is there room in a crowded and ever-evolving industry for this new breed of competitor?

*Financial Ballroom I –  
Mezzanine Level*

Moderator:

**Marci Taylor**, *Principal, Law Firm Advisory Services*, Withum Smith+Brown, PC

Panelists:

**Anthony E. Davis**, *Of Counsel*, Clyde & Co LLP  
**Bruce MacEwen**, *President*, Adam Smith, Esq.  
**Beatrice Seravello**, *Partner & Co-Head*, NewLaw, Baretz+Brunelle LLC  
**Jason Solomon**, *Lecturer in Law & Executive Director*, Deborah L. Rhode Center on the Legal Profession, Stanford Law School

**Breakout #2**

**Propulsion Dynamics: Maximizing Value in Strategic Alliances & Business Partnerships**

*Financial Ballroom II –  
Mezzanine Level*

Recent events have underscored the intrinsic value of strategic alliances and external partners with extensive global reach and process efficiency. Such engagements highlight a marked shift toward more bespoke, potentially complex legal services and an implicit nod to pandemic-era financial controls still in place across the Am Law 200. This conversation builds upon collaborative synergies within the current market. How are firms maximizing the impact of third-party partners and professional associations on such matters as client service, business development, people management, or operational infrastructure?

Moderator:

**Julie Colgan**, *Vice President of Operational Excellence*, Epiq

Panelists:

**Justin Cheseroni**, *Chief Financial Officer*, Richards, Layton & Finger, P.A.

**Warren McCann**, *Corporate Counsel & Funding Director*, Law Finance Group

**Terri Pepper**, *Chief Executive Officer*, TerraLex

**Diane Scheffler**, *Chief Operating Officer*, Axinn, Veltrop & Harkrider LLP

**Breakout #3**

**Forging Empires: Resource and Fiscal Investment in Law Firm R&D**

*Financial Ballroom III –  
Mezzanine Level*

Identifying R&D opportunities toward improved products and/or services is a regular practice for corporations. As the legal industry continues to retrench, opportunities for R&D investment may provide a competitive edge amid increased market competition. For a firm looking to pursue such an approach, where best to establish roots? How do firms identify key areas of investment and how much of their overall budget or resources can be truly dedicated to R&D? Please join us for a lively exploration of short- and long-term successes (and failures) in pursuit of transformative growth.

Moderator:

**Tom Baldwin**, *Partner*, Fireman & Company, an Epiq Company

Panelists:

**Mark Gargiulo**, *Chief Operating Officer*, Gray Reed & McGraw LLP & *President*, Gray Reed Advisory Services LLC

**Carla Swansburg**, *Chief Executive Officer*, ClearyX

**Vivek Wadhwa**, *Chief Operating Officer*, Fragomen, Del Rey, Bernsen & Loewy, LLP

2:15 PM ET-  
2:30PM ET

**Networking Break**  
*Sponsored by IST Management*

*Grand Ballroom Foyer –  
Floor 3*



2:30PM ET-  
3:30PM ET

**The New Romantics: Reimagining Purpose & Compensation in Modern Legal Services**

*Grand Ballroom – Floor 3*

Talent management in a pandemic era persists through divergent and dynamic means. When not defining hybrid working models or (re)calibrating office strategy, many firm leaders find themselves grappling with elevated associate attrition and pockets of existential angst over career trajectory, professional purpose, compensation, or work-life balance. This conversation asks not *what* (or *whom*) each firm can afford to pay, but what *makes sense* for a given organization? How are leaders addressing itinerant talent in modern legal services? How are firms incorporating notions of “culture” and “value” within their own compensation models? Is the current industry arms race truly sustainable for most of the Am Law 200? And perhaps, most intriguingly, are heightened attrition levels emblematic of short-term social disruption or much broader, institutional change?

Moderator:

**Jeffrey P. Connor**, *Chief Financial Officer*, McGuireWoods LLP

Panelists:

**Dwight Floyd**, *Chief Operating Officer*, Eversheds Sutherland (US) LLP

**Shonette Gaston**, *Chief Operating Officer*, Blank Rome LLP

**Laura E. Long**, *Chief Operating Officer & Chief Financial Officer*, Hanson Bridgett LLP

**Janet Stanton**, *Partner*, Adam Smith, Esq.

**William M. Washington III**, *Chief Financial Officer*, Baker McKenzie

3:30PM-3:45PM  
ET

**Networking Break**  
*Sponsored by Grant Thornton*

*Grand Ballroom Foyer –  
Floor 3*



3:45PM-5:00PM  
ET

Breakout Sessions

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**Breakout #1**

**Watchers on the Wall: Managing Changed Risk Across the Firm**

Emerging from austerity into a sputtering economy creates significant operational and financial strain. In addition to enhanced operating costs and resumption of employee travel, managing the pandemic-era order-to-cash process, bolstering fraud and cybersecurity controls, or even marketing and client development spend yields considerable risk in a climate of tepid optimism. How are firms protecting themselves in a rapidly evolving landscape? This session explores emergent strategies in risk management as firms continue to stay vigilant and alert.

*Financial Ballroom I –  
Mezzanine Level*

Moderator:

**Margaret Poster**, *Principal*, MSP Advisors LLC

Panelists:

**Kathy Hall**, *Chief Financial Officer*, Winstead PC

**Mary Jackson**, *Chief Officer, Professional Resources*, Blake, Cassels & Graydon LLP

**Joseph J. Palermo**, *Chief Operating Officer*, Lowenstein Sandler LLP

**Christopher J. Waters**, *Chief Financial Officer*, Goulston & Storrs PC

**Breakout #2**

**Expansive View: Developing a Growth-Focused Knowledge Management Strategy**

Technology and business intelligence (“BI”) help identify growth opportunities and overall operational efficiencies. Yet with the pandemic moving most law firm operations to the cloud, and industry forecasts predicting a gradual decline in market momentum, firms may do well to access intelligence outside their usual purview, eliciting important questions over a scalable, growth-oriented knowledge management (“KM”) plan for the firm. How can firms establish a versatile and cohesive KM strategy in the modern workspace? What collaborative approaches (whether within or without) can accelerate or enhance existing processes and resources?

*Financial Ballroom II –  
Mezzanine Level*

Moderator:

**Bob Seabolt**, *Owner & Senior Consultant*, Robert D. Seabolt LLC & Former *Chief Operating Officer*, IST Management

Panelists:

**Cindy Thurston Bare**, *Chief Data & Innovation Officer*, Frost Brown Todd LLC

**Lisa Ellis-James**, *Former Chief Operating Officer*, Ogletree, Deakins, Nash, Smoak & Stewart, P.C.

**Kimberly A. Gardner**, *Chief Operating Officer*, Holland & Knight LLP

**Judy Mackenzie Stuart**, *Global Chief Knowledge Officer*, Bryan Cave Leighton Paisner LLP

**Breakout #3**

**Transformative Measures: Mastering Firmwide ESG Strategy**

Client- and employee-driven expectations around environmental, social & corporate governance (“ESG”) continue to impact both the business and practice of law. As business and people leaders, C-Suite officers play key roles in establishing policies and broader expectations across the enterprise. This breakout asks participants to examine current and forthcoming ESG investments within their firm. Where and how has the organization made strides (or come up short) regarding expectations and behaviors? Please join us for a dynamic and interactive exploration of strategic vision and execution.

Moderator:

**John Friedman**, *Managing Director – ESG & Sustainability*, Grant Thornton LLP

Panelists:

**Gayatri Joshi**, *Executive Director*, Law Firm Sustainability Network

**William M. Libit**, *Chief Operating Partner*, Chapman and Cutler LLP

**Natalie Runyon**, *Director, ESG Content & Advisory Services*, Thomson Reuters

**Aragon St-Charles**, *Global Head of ESG*, Dentons

*Financial Ballroom III – Mezzanine Level*

**5:00PM-6:00PM ET**

**Thursday Night Reception**

Please join us for our cocktails and canapés as we reflect upon the day’s discussions.

*Sponsored by Introhive*



*Grand Ballroom Foyer – Floor 3*

**DAY TWO**  
**FRIDAY, 28 OCTOBER 2022**

**8:30AM-9:30AM ET**

**Breakfast & Partner Talks**

Partner Talk #1

**The Attrition Antidote: Anticipating & Preempting Attrition through People Intelligence**

Much is said about the “Great Resignation,” an ongoing economic trend in which employees across levels, especially those mid-career, are resigning at unprecedented rates. Law firms had a retention issue even prior to the Great Resignation—and it has only gotten worse,

*Grand Ballroom – Floor 3*



much worse, over the past 18 months. Many senior leadership teams have tried to solve the attrition challenge by funneling a significant portion of free cash into elevated associate and staff salaries. And while money often surfaces as the reason professionals give for leaving, more often compensation is merely one of several key reasons why people elect to go (or stay). This talk delivers a practical solution for firms looking to truly crack the talent retention cipher by committing to a powerful “early warning system” built upon behavioral science and data intelligence.

Presenter:

**Mark Masson**, *Managing Partner & Chief Operating Officer*, Lotis Blue Consulting LLC

Partner Talk #2:

**Terraformed Talent: A Case Study on Law Firm Associate Work Allocation**

Amid rapidly evolving employee expectations and renewed focus on equity and bias in the workplace, leading law firms are investing in a recalibrated Associate work allocation process as part of a contemporary enterprise talent management roadmap and revenue strategy. What considerations are innovative firms deploying *vis-à-vis* implementation, execution, and reporting? What breakthroughs (or setbacks) have firms encountered throughout this critical journey? Please join us for a compelling case study facilitated by senior firm leadership and a trusted business services partner.

Presenters:

**Leah N. Fisher**, *Director of Inclusion & Diversity*, Baker & Hostetler LLP

**Jason Noble**, *President*, ikaun



Partner Talk #3:

**Diamonds in the Rough: Uncovering the Hidden Value of Client Intelligence**

Business growth in the current climate involves the transformation of law firm client data into a versatile strategic asset. Indeed, thanks to the ongoing maturation of data analytics across the profession, legal services providers are in position to expand client relationships and operate more efficiently thanks to key technologies and evolving data skill sets among business staff and the broader firm partnership. This presentation highlights the latest success strategies for leveraging client intelligence at large and midsize firms. Participants will discover how to take their organization to new heights of data analytics and truly differentiate their market position.

Presenters:

**Jessica Bolf**, *Senior Director of Alliances*, Introhive



Partner Talk #4:

**Diversified Leverage: Enhancing Firm Profitability and Client Alignment through Litigation Finance**

With economic uncertainty dominating law firm strategic planning, many members of the Am Law 200 and Global 100 are exploring litigation finance to help insulate their firms and clients against business illiquidity; the inherent risks of litigation; and its escalating costs. According to one industry survey, 76% of in-house and law firm respondents reported leveraging legal finance in recent matters — more than double the percentage just four years prior. Another survey revealed that 68% of in-house and law firm lawyers believe legal finance will become more common in the years ahead, particularly as a mechanism to mitigate recessionary impacts. Law firm COOs and CFOs are key decision-makers in determining whether litigation funding can fuel enhanced law firm profitability, while better aligning the interests of firms and their clients. This presentation offers a timely look at the mechanics of litigation funding and specific benefits to law firm and client financial performance, risk mitigation and operational efficiency.



Presenter:

**Allen Fagin**, *Board Member & Senior Advisor, Validity Finance*

**9:30AM-10:30AM ET**

**Friday Keynote**

**Purple Haze: A US Political Roundtable**

With expectations of a so-called “red wave” in the US midterm elections against the backdrop of a tumultuous global stage, all eyes are on Capitol Hill and America’s volatile regulatory landscape in year two of President Joe Biden’s administration. Economic and geopolitical instability, legislative gridlock, evolving homeland security threats, and a conservative-leaning SCOTUS are core political flashpoints with direct, global ramifications for business leaders. Please join us for a special fireside chat with two esteemed US political commentators at a pivotal moment in American history.

Moderator:

**Jeff Mason**, *White House Correspondent, Reuters*

Presenters:

**Donna Brazile**, *Veteran Democratic Political Strategist; Adjunct Professor; Author & Opinion Columnist*

**Dr. William Kristol**, *Founder and Director of Defending Democracy Together; Political Analyst & Network Television Commentator*

*Grand Ballroom – Floor 3*

**10:30AM-10:45AM ET**

Break

*Sponsored by RRD*

*Grand Ballroom Foyer – Floor 3*





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**10:45AM-  
12:00PM ET**

**Into the Metaverse**

*Grand Ballroom – Floor 3*

The next frontier for legal services is rooted in digital expansion. Once the stuff of science fiction and fantasy, decentralized virtual planes contain discrete economies and world-building potential rife with possibility and promise. This closing keynote offers a compelling take on the scale and impact of this ever-evolving technology upon modern commerce. How and where might this latest evolutionary leap influence the next generation of legal clients and how might firms need to prepare for new business trends in an evolving digital age?

Moderator:

**Joe Raczynski**, *Technologist & Futurist*, Thomson Reuters

Panelists:

**Janet Balis**, *Americas Marketing Practice Leader*, Ernst & Young LLP

**William Kerr**, *General Counsel*, Everyrealm Inc.

**Guido Molinari**, *Managing Partner*, Prysm Group

**Mark Reinstra**, *General Counsel*, Roblox

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**12:00PM ET**

Closing Remarks

*Grand Ballroom – Floor 3*