

Ark Group/Managing Partner Magazine's 6th Annual

Knowledge Management in the Legal Profession

Developing a practical knowledge strategy enabling new economic models, sharpening your firm's value proposition to its clients

October 26-27, 2010
 AMA Executive Conference Center
 New York, NY

This conference is designed to help you:

- Develop a practical knowledge strategy in step with the changing nature of our economic environment and changing needs of our clientele
- Advance or cultivate KM initiatives and knowledge resources that bring the most value to your firm and its clients
- Enable new economic models at your firm—leveraging business process efficiencies in the execution of client services
- Understand the connections between AFAs and KM and why AFAs present a tremendous opportunity for KM to drive the profitability and future of law firms
- Identify the tools and processes that enable the application of a firm's entire knowledge base for the health and benefit of the client
- Support the business case for KM's leadership in Legal Project Management—illustrating why KM professionals are best positioned for this type of work
- Transform KM from institutionalized and bureaucratized cost center to business generator and profitability driver with front-line business impact

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With Key Contributions and Candid, Real-World Illustrations from:

- V. Mary Abraham, Counsel, **Debevoise & Plimpton LLP**
- Thomas W. Baldwin, Chief Knowledge Officer, **Reed Smith LLP**
- Oz Benamram, Esq., Chief Knowledge Officer, **White & Case LLP**
- Toby Brown, Client Teams, Alternative Fee Arrangements, KM, **Fullbright & Jaworski LLP**
- Joshua Fireman, Vice President and Senior Consultant, **ii3 Inc.**
- Marlene Gebauer, Director Library Services, **Greenberg Traurig LLP**
- Greg Lambert, JD, MLIS, Library & Records Manager, **King & Spalding**
- Steven A. Lastres, JD, MLS, Director of Library & Knowledge Management, **Debevoise & Plimpton LLP**
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- Julia Randell-Khan, Head of International Client Development, **Freshfields Bruckhaus Deringer LLP**
- Ali Shahidi, Director of Knowledge Management, **Bingham McCutchen LLP**
- Ronald W. Staudt, Professor of Law & Associate Vice President for Law, Business & Technology, **Chicago-Kent College of Law**
- Andrew Terrett, National Director of Knowledge Management, **Borden Ladner Gervais LLP**
- Lann Wasson, Senior Manager of Knowledge Management, **Husch Blackwell LLP**
- *And others TBA!*

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There is little doubt that a new era in law firm management is at hand. Success in the legal profession equates to keeping a firm relevant to the changing nature of its economic environment, and particularly the needs of its clientele. Law firms that demonstrate flexibility and innovation when partnering with their clients stand to reap significant rewards. This however necessitates that firms develop knowledge and skill in the *business of the business*—hence creating new opportunities to manage process and technology within the context of the client.

In the pursuit of excellence in a new economy there exists a very real opportunity for KM professionals to strategically position themselves within this new paradigm. But the vagaries of KM have been both its blessing and its curse—seemingly placing KM in a perpetual cycle of reinvention. However it is the work itself that defines KM's function and utility—and due to its increasingly multidisciplinary nature, practitioners are finding new opportunities to support the business while working across departmental boundaries.

Ark Group/Managing Partner Magazine's 6th annual **Knowledge Management in the Legal Profession** conference will once again take place in **New York** this **October 26-27, 2010**—again providing a unique opportunity for meaningful dialogue in an intimate setting with an undiminished focus placed on extensive audience participation.

This year's conference will largely focus on the confluence of ideas concerning how KM can help enable new economic models—embedding new efficiencies into the execution of client services in support of *legal service logistics* challenges that tend to drive excessive legal costs. If the "strategic imperative" is greater efficiency in the delivery of legal services—then where does KM fit into this equation?

The bottom line for KM is the bottom line. As margins compress and pricing models become more flexible, many firms are reconsidering how to best align and coordinate their information and knowledge assets within the larger scope of redefining its value proposition to clients. Alternative fee arrangements alone present a tremendous opportunity for KM to drive the profitability and future of law firms.

It is well-documented that clients are looking for practice efficiencies and value from their counsel. As clients continue to fine-tune expectations, it is increasingly important that law firms develop skills in the business of law as well as tools and processes that enable the application of a firm's entire knowledge base. This is a new paradigm in which law firms can be extremely successful, but they must adapt new operating disciplines that converge their use and deployment of knowledge management and project management.

Is there a business case to be made supporting KM's leadership in Legal Project Management? Why might KM professionals be best positioned for this type of work (having been involved in business process change their entire careers)?

We sincerely hope you will consider joining us this October in New York for Ark Group/Managing Partner Magazine's 6th annual **Knowledge Management in the Legal Profession** conference.

Not only does this conference represent an ideal opportunity to learn from and network with your industry peers. But it also illustrates how KM has become a dynamic, multidisciplinary part of the organization where librarians, business analysts, practice support lawyers, project managers and technologists can come together in support of value creation and explicit business goals.

Reserve your seat among your industry peers today...

ABOUT YOUR CONFERENCE CHAIRPERSON:



Ronald W. Staudt, Professor of Law and Associate Vice President for Law, Business and Technology, Chicago-Kent College of Law

Professor Staudt received a B.S. in mathematics and a B.A. in philosophy from St. Joseph's College, Rensselaer, Indiana. He is a graduate of the University of Chicago Law School, where he was a member of the UNIVERSITY OF CHICAGO LAW REVIEW. Before joining the Chicago-Kent faculty in 1978, he practiced with the firm of Hubacheck, Kelly, Rauch & Kirby for two years, was staff attorney and assistant director of the Pima County, Arizona Legal Aid Society, and was a clinical fellow and lecturer at the Mandel Legal Aid Clinic, University of Chicago Law School. Professor Staudt is the associate vice president of law, business and technology and a professor of law at Chicago-Kent College of Law. He teaches Copyright Law, Intellectual Property Strategies, Internet Law, Public Interest Law & Policy and Access to Justice and Technology. He is director of the Center for Access to Justice & Technology (CAJT) -- a law school center using Internet resources to improve access to justice with special emphasis on building Web tools to support legal services advocates, pro bono volunteers and pro se litigants. Current CAJT projects include the law school's Public Interest Certificate program; Access to Justice Author, a collaboration with the Center for Computer-Assisted Legal Instruction to build new computer interfaces for self-represented litigants; and the Self-Help Web Center at the Cook County Courthouse in the Daley Center, where law student volunteers help self-represented litigants to use technology tools developed at CAJT. Professor Staudt has written numerous articles and books on technology and law. His most recent book is a report co-authored by Charles L. Owen, Distinguished Professor of Design at IIT's Institute of Design, and Edward B. Pedwell, titled ACCESS TO JUSTICE: MEETING THE NEEDS OF SELF-REPRESENTED LITIGANTS. Professor Staudt is a member of the ABA Law Practice Management Section's E-Lawyering Task Force, the ABA Standing Committee on the Delivery of Legal Services Advisory Council and the ABA TechShow 2006 Planning Board.

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Pre-Conference Workshop: Tuesday, October 26, 2010—KM and LEGAL PROJECT MANAGEMENT

WORKSHOP OVERVIEW:

Matters are projects. Attorneys work on matters. Attorneys should be able to apply project management practices to legal work. But law firms and in-house legal departments are finding that legal project management (PM) is easier said than done.

The practice of law differs from operational businesses, and not just because lawyers provide professional services. Internal politics, compensation, structure and access to clients conspire to hinder the implementation of project management.

"One size does NOT fit all." Project Management models need to be varied based on work-type (transaction, litigation or compliance). A hybrid PM model may be necessary – one that leverages knowledge, incumbency and people skills with practice-specific knowledge and PM rigor. Can it be done? And how can Knowledge Management (KM) help legal project management take hold?

This workshop is designed to:

- Define the various legal PM models and core project management principles and practices
- Assist attendees with developing practical approaches for the implementation of Legal Project Management within their own firms
- Develop the business case supporting KM's leadership in Legal Project Management

We will treat the challenge of legal PM implementation as a project unto itself—applying project management practices to the development of a project plan for the introduction of legal PM to a law firm. Participants will leave this workshop with a project plan that they have developed themselves that can later be used as a template at their respective firms.

AGENDA:

8:30AM Sign-In & Networking Breakfast

9:00AM Primers on PM and Legal PM

- The core elements: Scope, time, cost, quality, risk, and communication
- The core phases: Initiation, planning, execution, closing
- Roles and Responsibilities: Who is the Project Manager in Legal PM? Is this a lawyer, a professional PM or someone else?

10:00AM

Review of Potential Legal Project Management Models

- Transactional, Litigation, and Compliance models

10:30AM Morning Networking & Coffee Break

11:00AM Where does KM fit in?

- What value does the KM function deliver currently?
- What resources does KM have to offer?

- Evaluating PM/KM links and overlap
- Is this a new chapter or the end of the road for KM?

12:15PM Networking Luncheon

1:15PM Case Study: Project Planning a Legal PM Initiative

- Project charter and plan
- Requirements definition
- Scope review

2:30PM Afternoon Networking & Coffee Break

3:00PM Project Planning a Legal PM Initiative—continued

- Implementation
- Pilot
- Measures of success and ROI

4:00PM Wrap-Up/The Business Case for KM Leadership

- Why are KM professionals best-positioned for PM work?
- What role will KM play on an ongoing basis?

4:30PM End of Workshop

About Your Workshop Leaders



Joshua Fireman is ii3 Inc.'s Vice-President and Senior Consultant. Regarded as a thought leader with a practical edge, Joshua (a former practicing attorney) has extensive experience consulting in legal and other professional services sectors—performing lead consulting roles on key client engagements, leveraging his extensive knowledge management experience. Prior to joining ii3, Joshua led the development of McCarthy Tétrault's knowledge management system and was in-house counsel with Canadian Pacific Limited. Joshua has created and implemented law firm knowledge management operations and deployment strategies—helping to create firm-wide business consensus, build organizational structures, set business-based goals and establish measures of success.



Andrew Terrett is the National Director of Knowledge Management at **Borden Ladner Gervais LLP**. He is responsible for the implementation of the firm's Knowledge Management strategy which in turn supports the firm's Professional Excellence Program. Andrew was admitted as a solicitor in England and Wales in 1994 and is also a certified project manager (PMP). Andrew has focused almost his entire professional career on technology as applied to the practice of law. To this end, he has worked with and within law firms as a technology consultant, an in-house project manager and for a number of software vendors on large IT implementation projects. He has also written extensively on the area, including a book entitled 'The Internet – Business Strategies for Law Firms', published by the Law Society of England & Wales (2000). Andrew has a Bachelor's degree in Law from the University of Warwick, England and Master's in Law (LL.M) from the University of British Columbia.

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Forum Agenda – Wednesday, October 27, 2010

8:15AM Registration & Networking Breakfast

8:45AM Opening Remarks: Conference Chairperson

Ronald W. Staudt, Professor of Law and Associate Vice President for Law, Business and Technology, **Chicago-Kent College of Law**

9:00AM KEYNOTE

Change is a Result—Evolution is the Process

Success in the legal profession equates to keeping a firm relevant to the changing nature of its economic environment, and particularly the needs of its clientele. Far too many view change as a finite event, an end in and of itself, when in fact change is the result of an evolutionary, if not revolutionary, process—evolving slowly in response to external stimuli (i.e. the needs of the marketplace). At present, many law firms are coming to grips with demands that are driving new practices and structures to serve those needs. Along this evolutionary path, each respective firm function will be forced to change accordingly. This thought-provoking opening address will encourage attendees to consider how this process can be dealt with competitively, and whether there is an initiative that can be taken by KM practitioners to stay ahead of the curve—and *participate* in the change process.

Bruce W. Marcus, **The Marcus Letter**

9:30AM

Expanding KM from the Practice of Law to the Business of Law

This discussion will provide a pragmatic map to help KM personnel migrate from traditional KM roles and activities to roles and activities that are more focused on increasing business and reducing costs. Using the "device" of the migratory path of birds, our co-presenters will illustrate how different species of knowledge managers can repackage themselves to become more integral to the business of their firms. This involves understanding what new opportunities and roles exist, as well as the various core skill sets and how they transfer to the new roles. In the process of discussing new roles and related skill sets, attendees will also spend time evaluating KM's involvement in AFAs and related opportunities to broaden horizons—introducing a wider range of possibilities for KM personnel.

V. Mary Abraham, Counsel, **Debevoise & Plimpton LLP**
Oz Benamram, Esq., Chief Knowledge Officer, **White & Case LLP**

10:15AM Morning Networking & Coffee Break

10:45AM CASE STUDY

Alternative Fees Driving KM? – A Large Firm Case Study

The vagaries of KM have been both its blessing and its curse. The blessing: KM can be tied to numerous knowledge and productivity efforts. The Curse: Without a direct connection to a business goal, KM can lack focus and lose direction. This session entails a case study of how a large firm's KM effort was quickly engulfed by Alternative Fee Arrangements (AFAs) and is emerging out the other side with significant energy and leadership backing. Attendees will specifically examine a multimillion dollar AFA through its various stages—revealing lessons learned (many the hard way) and how KM will play a new role going forward. The bottom line for KM IS the bottom line. AFAs present a tremendous opportunity for KM to drive the profitability and future of law firms. This session will provide insight and ideas for how to move your KM program in the same direction.

Toby Brown, Client Teams, Alternative Fee Arrangements, KM,
Fulbright & Jaworski LLP

11:30AM PANEL DISCUSSION

KM as an Intelligence Tool: Where do BI, CI and KM Intersect in Today's Value Paradigm?

KM today is very much a cross-functional/multidisciplinary part of the organization consisting of librarians, business analysts, practice support lawyers, project managers and technologists. It is the work itself that defines KM's function and utility—and due to its increasingly multidisciplinary nature, practitioners are finding new opportunities to support the business while working across departmental boundaries. In this interactive panel discussion, we will evaluate the "game changing opportunities" for KM to be leveraged as an intelligence tool—blurring the lines between BI, CI and traditional Knowledge

Management.

Panel:

Thomas W. Baldwin, Chief Knowledge Officer, **Reed Smith LLP**, Ali Shahidi, Director of Knowledge Management, **Bingham McCutchen LLP**, *Others TBD*

12:30PM Networking Luncheon

1:30PM PANEL DISCUSSION

Repositioning the Library at the Center of Strategic KM

As law firms continue to re-engineer and refine their knowledge-sharing environments to meet changing business goals, we are confronted by questions (and the occasional turf-war) concerning the ideal relationship between the Library and KM. While aspiring to bridge the gap between research and analysis—between information and actionable strategy—between content and tacit knowledge—perhaps we ought to re-think our definition of the KM organization—where it resides and what department it reports into (and why)? This lively panel discussion will discuss (and perhaps debate) how to best align and coordinate a law firm's information and knowledge assets as many law firms begin to redefine its value proposition to its clients.

Panel:

Greg Lambert, JD, MLIS, Library & Records Manager, **King & Spalding**, Steven A. Lastres, JD, MLS, Director of Library & Knowledge Management, **Debevoise & Plimpton LLP**, Marlene Gebauer, Director Library Services, **Greenberg Traurig LLP**

2:30PM CASE STUDY

Piloting Lean Six Sigma:

Working Out a Model for Practice Group Deployment

Despite a growing interest in project management, it is often a challenge to start a Lean Six Sigma initiative in a law firm because the typical service deployment strategy requires a significant commitment from leadership, a substantial investment in training and a high opportunity cost for lawyers. For those practice groups that want to go beyond matter budgeting and gain visibility into the theme and variation of their workflow, is there a viable alternative that can build Lean and Six Sigma expertise within a practice? How can Knowledge Management support this effort? In turn, how does Lean Six Sigma inform the practice of Knowledge Management? This session will discuss how a pilot group developed a cost-effective working model for improvement based on the underlying principles of Lean, Six Sigma and PMI's Project Management Body of Knowledge.

Lann Wasson, Senior Manager of Knowledge Management, **Husch Blackwell LLP**

3:15PM Afternoon Networking & Coffee Break

3:45PM CLOSING PANEL DISCUSSION

Client-Facing Project Management:

What are clients looking for and how do you deliver it?

As pricing models become more flexible and clients continue to fine-tune expectations, it is increasingly important that law firms develop skills in the *business of law*—as well as tools and processes capable of applying their knowledge base (both legal and financial) for the health and benefit of the client. This is a new paradigm in which law firms can be extremely successful, but they must adapt new operating disciplines that converge their use and deployment of knowledge management and project management. This closing panel discussion will focus on this convergence (highlighting the use of client-facing extranets and other matter-specific content) as well as the tools and resources necessary to create successful outcomes for the client *and* the law firm.

Panel:

Howard J.C. Nicols, Global Managing Partner, **Squire Sanders & Dempsey LLP**, Michael Mills, **Kraft & Kennedy, Inc.**, Julia Randell-Khan, Head of International Client Development, **Freshfields Bruckhaus Deringer LLP**

4:45PM Closing Remarks: Conference Chairperson

Knowledge Management in the Legal Profession

	Attendee 1	Attendee 2	Attendee 3
Name			
Job Title			
Organization			
Address			
Zip Code			
Phone			
Fax			
Email			

Signature

I have read the terms and conditions below

- Pre-Conference Workshop Only (OCT 26) \$695
- Full-Day Conference Only (Main Forum - OCT 27) \$895
- Conference + Workshop (OCT 26-27) \$1495
- I am registering for this event before [September 17th](#) and would like to claim my 15% early bird discount—

Please note: payment must be received in full prior to the event to guarantee your place

<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	
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- Payment in the mail (checks made payable to Ark Group USA)
- Multiple bookings: please invoice separately**

Registration conditions

1. Registrations can be submitted at any stage prior to the event, subject to availability. A limited allocation is being held and registering early is therefore recommended, in the event of the registration not being accepted by Ark Group the total amount will be refunded.
2. Payment must be received in full prior to the course.
3. All speakers are correct at the time of printing, but are subject to variation without notice.
4. If the delegate cancels after the registration has been accepted, the delegate will be liable to the following cancellation charges:
 - Cancellations notified over 45 days prior to the event will not incur a cancellation fee.
 - In the event of a cancellation being between 45 and 30 days prior to the event, a 20% cancellation fee will be charged.
 - For cancellations received less than 30 days prior to the event, the full delegate rate must be paid and no refunds will be available.
5. All registrations submitted by e-mail, fax, or over the telephone are subject to these booking conditions.
6. All cancellations must be received in writing.
7. Ark Group will not be held liable for circumstances beyond their control which lead to the cancellation or variation of the program.
8. Please make checks payable to Ark Group USA.

Ark Group USA will not use your email address or information for any purpose other than distributing our conference and event notices.

Venue and Accommodations

This meeting will be held at the **AMA Executive Conference Center, New York**, located at 1601 Broadway, New York, NY 10019. For information regarding nearby hotels (most within walking distance to the AMA) please contact Peter Franken at pfranken@ark-group.com or 773-281-4275

Who Will Attend This Conference

Ark Group's 6th annual Knowledge Management in the Legal Profession conference is a highly interactive forum researched with and developed exclusively for directors of knowledge management, library and information services, client, professional and practice support thought leaders—as well as those involved in coordinating or leveraging resources within these functions—including attorneys seeking to gain better control of their costs in an effort to meet schedules, monitor and reduce matter/project related risk.

Exhibition & Sponsorship Opportunities

If you are interested in exhibition or sponsorship opportunities for this (or any) Ark Group event, please contact Kevin Klein for more details at kklein@ark-group.com or by phone at 708-386-3868.

Knowledge Management in the Legal Profession

THIS CONFERENCE WILL BE HELD AT:

October 26-27, 2010 — New York, NY

AMA Executive Conference Center

1601 Broadway
New York, NY 10019
212.586.8100

<http://www.amaconferencecenters.org/new-york.htm>



The AMA's Executive Conference Center is conveniently located at 48th & Broadway (shares the same building as the Crowne Plaza Hotel) in the heart of New York City's bustling Times Square.

***Recommended Hotels (within walking distance to the forum venue):**

Belvedere Hotel

319 W. 48th Street
New York, NY 10036
212.245.7000 > Reservations
<http://www.belvederehotelnyc.com/>

Crowne Plaza Manhattan

1605 Broadway
New York, NY 10019
212.977.4000 > Reservations
<http://www.cpmahattantimesquare.com/>

Sheraton Manhattan

790 7th Avenue
New York, NY 10019
212.581.3300 > Reservations
<http://www.starwoodhotels.com/sheraton/property/overview/index.html?propertyID=425>

Marriott Renaissance New York Times Square

714 7th Avenue @ W. 48th Street
New York, NY 10036
212.765.7676 > Reservations
<http://www.marriott.co.uk/hotels/travel/nycrt-renaissance-new-york-hotel-times-square/>

***Recommendations on the Upper West Side (a short cab ride to the venue):**

On The Ave

2178 Broadway at W 77th Street NY 10024
1.800.509.7598 | 212.362.1100
<http://www.ontheave-nyc.com>

The Lucerne—New York

201 WEST 79 STREET NEW YORK, NY 10024
212.875.1000 OR 800.492.8122
<http://www.thelucernehotel.com/>

Directions and Maps

*AMA New York Executive Conference Center
1601 Broadway
New York, NY 10019*

The following can be used as a guide for your visit to the Executive Conference Center, New York. If you should have any further questions, please do not hesitate to call us at 773-281-4275.

Directions

American Management Association (located in the same building as the Crowne Plaza Hotel) 1601 Broadway at 48th Street near Times Square. Entrance is on 48th Street.

From PENN PLAZA to 1601 BROADWAY (Fastest Route):

1. Going west on W. 33rd St. toward 8th Ave. 0.11 miles
2. Turn RIGHT onto 8th Ave. 0.85 miles
3. Turn RIGHT onto W. 50th St. 0.12 miles
4. Turn RIGHT onto BROADWAY. 0.06 mile **For additional driving directions and maps click here <http://www.mapquest.com/>**

Transportation

Airport Transportation:

Transportation to/from the airport is available for a fee via Super Shuttle. Upon arrival at the airport, proceed to the Ground Transportation desk located near baggage claim, the Super Shuttle agents there will assist you. For your return trip to the airport, contact Super Shuttle at least 24 hours in advance at 1-800-BLUE-VAN x3. New York taxi cabs are also available and rates can vary depending on the airport.

These three airports serve New York City:

John F. Kennedy International Airport, approximately 15 miles (estimate one hour travel time) from mid-Manhattan.

LaGuardia Airport, approximately 8 miles (estimate 30 minutes of travel time) from mid-Manhattan.

Newark International Airport, borders on the cities of Newark and Elizabeth, NJ, approximately 16 miles (estimate 45 minutes of travel time) from mid-Manhattan.

Parking:

There are parking garages available on 48th and 49th streets, as well as at the Crowne Plaza Hotel.

Bus:

From Uptown: **M 7, M 10, M 104**, exit at 50th St. and Broadway.

From Downtown: **M 10, M 104**, exit at 49th St. and 8th Ave.

M 5, M 6, M 7 exit at 49th St. and 6th Ave.

SUBWAY



To 47th-50th St.-Rockefeller Center



To 50th St. & 8th Avenue



To 50th Street



To 49th Street



To 51st Street

