Ark Group’s 6th Annual

Business Intelligence and Analytics in the Legal Profession

How analytics are being used to accelerate productivity across key firm dimensions—driving the development of standards, metrics and processes reflective of the firm’s broader business strategy

April 27, 2017
Princeton Club
New York, NY

Why Business Intelligence? BI is a survival tool, not an information resource. Of course law firms gather and tag data for a multitude of reasons, and are awash in rich information about the work they do. But business intelligence has an existential purpose, essential to law firms hoping to survive the brutal, selective pressures of today’s marketplace.

BI is also a design tool. We don’t often think of BI as a design tool, but that is its core purpose — helping to redesign businesses in a constantly shifting landscape, rife with mortal peril. Law firms, and perhaps even entire legal markets, are mortal as well. We see more predators lurking in the trees every day — virtual firms, LPOs, process automation…even practice automation.

And therein is the larger story of why we do BI. Business intelligence is only useful to the extent that it extends and enriches the lifespan of the businesses it serves.

Ark Group’s 6th annual Business Intelligence and Analytics in the Legal Profession conference will once again provide an ideal platform for discussion and debate concerning how analytic tools can be leveraged to accelerate productivity and analysis across key firm dimensions.

Attendees will also explore some of the greater challenges and opportunities inherent to our shifting legal business ecosystem — and how effective BI can help firms to engage in an evolution that impacts both the business and the practice of law.

Do law firms today possess the knowledge and understanding to properly assess the opportunity that lies before them? How can we collectively become informed enough to apply these tools in the context of what our work and clients demand? What specific skills are critical to this endeavor, and which skills are we missing (and how do we fill those gaps)?

We hope you will join us, along with your industry peers this April in New York, as we collectively address the increasing prevalence and significance of data analytics and visualization tools — and how law firms are responding to an evolving business landscape in which they must reconsider how they compete — as well as who they are actually competing with...

SPONSORS:

Featuring key contributions and candid viewpoints from:

John Alber, Practical Futurist
Kevin Eddy, Chief Practice Management Officer, Osler, Hoskin & Harcourt LLP
Linda Novosel, Chief Pricing & LPM Officer, Steptoe & Johnson LLP
Steven R. Petrie, Chief Strategy Officer, Faegre Baker Daniels
Rebecca Holdredge, Practice Economics Attorney Manager, Bryan Cave
Meredith Williams, Chief Knowledge Management Officer, Baker, Donelson, Bearman, Caldwell & Berkowitz, PC
Mark T. Greene, Ph.D., President, Market Intelligence LLC
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Lann Wasson, Associate Director of Legal Project Management, Husch Blackwell LLP
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Peter Kaomea, Chief Information Officer, Sullivan & Cromwell LLP
Jordan Peterson, Manager, Financial Planning & Analysis, Crowell and Moring
Shawn Koupal, Global Director, Digital Marketing & Operations, Shearman & Sterling LLP
Svetlana Grigoryeva, Manager, Application Development & Architecture, Shearman & Sterling LLP
Shawn Hainsworth, Senior Architect/Developer & Programmer, Cooley LLP
Tom Jones, President, Iridium Technology LLC
And others...
will learn how several firms have strategically leveraged data science to help
forces a fixed pricing strategy, along with challenges in maintaining profitability.
Increasingly the client or the market itself will impose limits on pricing, which
there is little need for data science to be applied to pricing decisions. However,
If a client wants to pay hourly rates and is happy with the level of work, then
Pricing Arrangements into Profitable Opportunities

Jordan Peterson, Manager, Financial Planning & Analysis, Iridium Technology LLC

9:00AM Introductions Conference Chairperson
Tom Jones, President, Iridium Technology LLC

9:10AM KEYNOTE: Why BI?
The life of most businesses is, to quote Hobbes, "nasty, brutish and short." The
economic ecosystems in which businesses operate are packed with mortal peril.
Law firms, and perhaps even entire legal markets, are mortal as well. We see
more predators lurking in the trees every day—virtual firms, LPOs, process
automation...even practice automation. And therein is the larger story of why we
do BI. Business intelligence is only useful to the extent it extends and enriches the
lifespan of the businesses it serves. BI is a survival tool, not an information
resource. And only when it is used as such will the information produced by BI
rise to the level of true significance within a business. In this keynote, John Alber
will talk about the shifting legal business ecosystem and how truly effective BI can
help firms engage in the sort of constant redesign—that it business evolution—
that produces survivors rather than victims.
John Alber, Practical Futurist

9:45AM TED-Style Talk
Driving Analytics into Practice: A High-Speed Tour of the World of
Commercial Analytics and Predictive Tools
Perhaps surprisingly, there is a general lack of awareness within the legal
profession concerning what’s available in the world of commercial data
resources. This fast-paced segment will provide an overview of commercial
sources of data visualization and intelligence for business development,
identifying new opportunities, and managing client expectations (including
judicial, legislative and court-centric analytics).
Jean O’Grady, Sr. Director of Information, Research & Knowledge Management,
DLA Piper LLP (US)

10:15AM Morning Coffee Break

10:45AM PANEL DISCUSSION
Business Drivers Shaping Today’s Law Firm Business Intelligence
Roadmap: (Case Studies and Market Trend Discussion)
Three firms, three completely different BI and dashboard solutions. Each firm will
provide an in-depth depiction/illustration of one of their BI solutions. Questions
covered will include:
• What were the drivers for the BI initiative?
• Were the project goals achieved?
• What firm-specific customizations were required for the solution?
• What were the surprise „wins“ for the implementation?
• What is next on your BI roadmap?
Cheri Turner, Financial Systems Director, Holland & Knight, Kevin Eddy, Chief
Practice Management Officer, Osler, Hoskin & Harcourt LLP, Shawn Hainsworth,
Senior Architect/Developer & Programmer, Cooley LLP — Moderator: Tom Jones,
President, Iridium Technology LLC

11:30AM CASE STUDY
The Quest for One Version of the Truth
Jordan Peterson, Manager of Financial Planning and Analysis at Crowell and Moring,
will share some of the benefits that using a Business Intelligence tool has brought to his
firm. Probably most important, it is having a reliable, cohesive platform to provide everyone in the firm with “one truth.” Jordan will discuss the
firm’s challenges, prior to implementing BigSquare’s Business Intelligence Solution, such as having disparate data sources, multiple reports, inaccurate
information and what it means now in terms of time and cost savings, to have
everyone on the same page.
Jordan Peterson, Manager, Financial Planning & Analysis, Crowell and Moring

12:00PM Networking Luncheon

1:00PM PANEL DISCUSSION
The Intersection of Pricing & Data Science: Turning Challenging
Pricing Arrangements into Profitable Opportunities
If a client wants to pay hourly rates and is happy with the level of work, then
there is little need for data science to be applied to pricing decisions. However,
increasingly the client or the market itself will impose limits on pricing, which
forces a fixed pricing strategy, along with challenges in maintaining profitability
on the matter. This is where data science and analytics can help set the team and
shape the legal work to be done. In this interactive panel discussion, attendees
will learn how several firms have strategically leveraged data science to help
drive decision-making that maintains both positive outcomes for the client, as
well as healthy profit margins or the firm.

Steven R. Petrie, Chief Strategy Officer, Faegre Baker Daniels, Rebecca Holdredge, Practice Economics Attorney Manager, Bryan Cave,
Linda Novosel, Chief Pricing & LPM Officer, Steptoe & Johnson LLP

1:45PM It’s all about the Data: The Competitive Advantages of Data
Discipline and Data Governance
IBM estimates that low-quality data costs U.S. businesses $3.1 trillion each year. If
your firm relies on improperly governed data, visualizations and analysis results
may be skewed—impairing the overall strategic, empirically-based decision-
making process. A law firm that applies proper data governance and guided
analytics as a component of its overall information governance program can
easily circumvent suspect data to create a more competitive organization and
empower business users to drive data discovery. In this presentation, Megan
Beauchemin, director of business intelligence and analytics for InOutsource, will
discuss data governance principles, policies and management protocols that keep
your data pristine, as well as a guide/governed approach to analytics and data
discovery.
Megan Beauchemin, Director of Business Intelligence and Analytics, InOutsource

2:15PM Afternoon Coffee Break

2:45PM Addressing the BI to CI Continuum: How do these functions support
one another? (distinctions and synergies)
Although BI and CI both aim to improve decision-making, plan more effectively,
and improve outcomes, it behooves us to better understand how these two
functions are similar, different, overlapping, and even conflicting. This session
will focus on useful definitions of each, how they are often confused, how they
should complement one another—as well as where is each usually managed/funded in law firms. Attendees will also learn about competitive and business
intelligence synergies impacting brand (differentiation strategy) development,
financial analysis, and market dynamics—as well as interpretations of relationships among various firm data sets.
Mark T. Greene, Ph.D., President, Market Intelligence LLC

3:15PM CO-PRESENTATION
Business Intelligence Initiatives at Shearman & Sterling that Drive
Client Value and Enable Meaningful Analysis
Real-world examples of how the combination of data capture automation, ETL,
smart data warehousing and Tableau visualization revolutionized the way
Shearman & Sterling surveys Fortune 100 companies, providing client value
added services. Will share details around firm BI & data visualization initiatives
that help synthesize data in new ways, empowering business analysts to better
support partners and practices—as well as illustrate how enterprise Tableau
implementation has changed the way the firm delivers practice and financial
reporting to partners and analyzes data from disparate data sources for LPM and
BD.
Shawn Koupal, Global Director, Digital Marketing & Operations AND Svetlana
Grigoryeva, Manager, Application Development & Architecture, Shearman &
Sterling LLP

3:45PM CLOSING PANEL DISCUSSION
Helping the Data Tell its Story: How Organizational Capability Shapes Opportunity and Investment
Advanced Business Intelligence may soon become synonymous with law firm
capability—a very real differentiator in the legal marketplace. Indeed, there are
already stories of firms losing business because they have not demonstrated
capabilities in these areas. It is generally agreed upon that AI and cognitive
computing will eventually change the way lawyers think about the delivery of
their services. The technology is here, but building a case for investment requires
asking the right questions in order to understand the potential opportunities
usher ed in by data science. Do law firms today possess the knowledge and
understanding to properly assess the opportunity that lies before them? How
quickly can we become informed enough to apply these tools in the context of
what our work and clients demand? What assets and skills are critical to this
effort, and how can we fill in the gaps?
Peter Kaomea, Chief Information Officer, Sullivan & Cromwell LLP, Lann Wasson,
Associate Director Legal Project Management, Husch Blackwell LLP,
 Mahmoud Williams, Chief Knowledge Management Officer, Baker Donelson,
Berman, Caldwell & Berkowitz, PC — Moderator: Darby Green, Esq.,
Commercial Product Director, Bloomberg Law Litigation Solutions

4:30PM Q&A/Closing Remarks Conference Chairperson
Tom Jones, President, Iridium Technology LLC
# Business Intelligence and Analytics in the Legal Profession (NY)

## Attendee 1

**Name**

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**Job Title**

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**Organization**

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**Address**

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**Signature**

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I have read the terms and conditions below

- ☐ Registration/Admission (law firms) $995
- ☐ Registration/Admission (corporate/in-house) $595
- ☐ Admission for Vendors/Solution Providers $1495

☐ I am registering for this event before March 3rd and would like to claim my 15% early bird discount! ($845.75)

For team discounts, please call Peter Franken at 312 212 1301

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☐ Payment in the mail (checks made payable to Ark Group USA)

☐ Multiple bookings: please invoice separately

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# Venue and Accommodations

This year’s conference is taking place at the **Princeton Club—New York**, located at 15 West 43rd Street, New York NY 10036. If you require overnight accommodations for this conference, please see the list of nearby hotels on the next page. For other logistics-related inquiries, please contact Peter Franken at pfranken@ark-group.com or by telephone at 312 212 1301.

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# Who Will Attend This Forum

**Business Intelligence & Analytics in the Legal Profession** is designed for anyone tasked with navigating the economic, operational or strategic implications of data-driven business intelligence in both law firms and corporate legal departments—ideal for (but not limited to) CFOs, CIOs, COOs, and heads of strategic intelligence functions within firms, as well as managing partners, technology partners, heads of knowledge management, pricing, project management, practice support, operations, process improvement—as well as marketing and business development.

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# Sponsorship Opportunities

If you are interested in learning about any sponsorship opportunities for this event, or any others, please contact Kevin Klein for more details at kklein@ark-group.com or by phone at 312-212-1302.
## Business Intelligence and Analytics in the Legal Profession

**THIS CONFERENCE WILL BE HELD AT:**

**The Princeton Club of New York**
15 West 43rd Street  
New York NY 10036  
#212-596-1200  
[http://www.princetonclub.com](http://www.princetonclub.com)

*Standing nine stories tall in the heart of midtown Manhattan, The Princeton Club of New York (PCNY) boasts two restaurants, a fitness center, library and business center, as well as over 9,000 square feet of unique private meeting and event space.*

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