Today, most law firms have accepted that Competitive Intelligence (CI) is important. But not all firms are able to quantify its importance. CI can be challenging, requiring ongoing investments of time and money. But not all firms currently are able to commit the necessary staff or financial resources. Most importantly, to be effective, CI requires a strategy. Yet many law firms still don’t have a plan in place for gathering and utilizing competitive intelligence.

Whether you are a marketing lead, a firm administrator, a business development exec, a practice manager, or perform some other essential business function in support of a law firm, it can be challenging to help partners view the organization as a business.

The reality is that the market has changed, as has demand for legal services—more work staying in-house, going to alternative providers, or with more firms merging, and companies generally pushing back on legal spend. Hence, law firms need to be more strategic in planning for growth, competing for business, and staying ahead of the curve.

Ark Group’s 12th annual Competitive Intelligence in the Modern Law Firm conference will once again provide an ideal platform for benchmarking, discussion and debate concerning how competitive (and business) intelligence provides the foundation for strategic planning—enhancing the ability to expand relationships with clients, and to make faster and more informed decisions on behalf of the firm (and its clients).

Increasingly, law firms want to position themselves as trusted advisers, viewed by their clients as partners that deliver more than just legal advice. This entails knowing and understanding the clients’ industries, challenges and opportunities—which in turn requires insightful, actionable information that is never obsolete.

Competitive intelligence aims to provide attorneys with exactly what they need and when they need it, enabling them to truly be the most informed and the most strategic. But what are the best-practices for achieving this know-how?

We hope you will join us—along with your industry peers this September in New York, as we collectively address and discuss what actionable intelligence really means and what it looks like—from current awareness, to in-depth analysis to dashboards and beyond.

SPONSORS:
A Critical Underpinning of Competitive Intelligence
Peer comparisons are key inputs into many management decisions, including annual rate increases, lawyer and staff headcount changes, financial and operating analyses on PPP and expense differences, and strategic goals setting. Selecting peers in law firms today turns out to be a subjective and manual process. In this case study, we will discuss a new data-driven methodology to select financial peers using multiple dimensions, which can lead to appropriate comparisons and enhanced competitive intelligence. This discussion will focus on:

- A multi-dimensional performance framework
- Identifying financial peers for any law firm
2:00PM
The A(i)-B(i)-C(i) Continuum: How Intelligence Functions within Law Firms Can and Should Support One Another
CI and BI both aim to reduce risk in decision-making, but their synergies are often imperfect. So, it behooves us to better understand how these two functions are similar, different, and even conflicting. This session will include useful definitions of each, how they are often confused, how they can and should complement one another—as well as where is each usually managed and funded in law firms. Relationships among various firm data sets, internal and external, will be discussed. Of course, with “big data” in play, Artificial Intelligence should also play a role, as this session will also address.

Mark T. Greene, Ph.D., President, Market Intelligence LLC

2:45PM
Afternoon Networking Coffee Break

3:15PM  CO-PRESENTATION
Client Intelligence – Using CI for Smart Business Development
Today, most law firms have accepted that Competitive Intelligence is important. But not all firms are able to quantify its importance. Additionally, CI can be challenging, requiring ongoing investments of time and money. But not all firms currently are able to commit the necessary staff or financial resources. Most importantly, to be effective, CI requires a strategy. Yet many firms still don’t have a plan in place for gathering and utilizing CI. This presentation will not only provide you with practical ideas and advice for overcoming some of these CI challenges, but will also share real-life stories of CI business development successes that you can use to quantify the value of CI and advocate for additional resources—addressing some of the most timely and relevant CI topics including:

- Developing and implementing a CI strategy
- Creating an effective CI report
- Utilizing CI to prepare for business meetings and Client interviews
- Dealing with resource constraints
- Evaluating internal and outsourced staffing options
- Working together with the lawyers to provide the BD information they really need
- Using CI for lead generation
- Leveraging technology to enhance the value of CI
- Communicating successes to enhance participation
- What other successful firms are doing to drive CI initiatives at their firms

Stefanie Marrone, Director Business Development & Marketing, Tarter Krinsky & Drogin LLP AND Christina Fritsch, JD, Founder, ClientsFirst Consulting

4:00PM  CASE STUDY
"Context" — Using Knowledge Management Tools to Support Competitive Intelligence Efforts in Your Legal Organization
Context is the baseline metric for scope and relevancy, and the right combination drives the bus. This discussion will cover how intelligence gathering and presentation is made more effective by utilizing internal knowledge management tools to better determine the intelligence needs of your organization, and to make the relevancy of intelligence explicit to

Jeffrey Cohan, Director of Libraries and Knowledge Management Services, Fitzpatrick, Cella, Harper & Scinto

4:30PM  Q&A/Closing Remarks
Conference Chairperson

This conference is taking place at:
The Princeton Club of New York
15 West 43rd Street
New York NY 10036
#212-596-1200
http://www.princetonclub.com

If you have any questions about conference admission costs, the conference venue/location, sleeping rooms or accommodations, team discounts, anything at all—please don’t hesitate to give us a call. Please call Daniel Smallwood at 312-212-1301 or contact us by email at dsmallwood@ark-group.com

Register to attend before June 30th to receive your 15% Early-Bird Discount!

We hope to see in New York this fall!
# Competitive Intelligence in the Modern Law Firm 2018 (NY)

**Attendee 1**

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**Signature**

I have read the terms and conditions below

- [ ] Registration/Admission (law firms) $895
- [ ] Admission for Vendors/Solution Providers $1295
- [ ] EARLY-BIRD DISCOUNT: I am registering before June 30th and would like to claim my 15% early bird discount! ($760.75)

**For Team Discounts please call Daniel Smallwood at 312 212 1301**

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

- [ ] Card number
- [ ] Expiration Date
- [ ] Security Code

- [ ] Payment in the mail (checks made payable to Ark Group USA)
- [ ] Multiple bookings: please invoice separately

### Registration Conditions:
- Substitute registrants from the same organization will be honored.
- All cancellation and refund requests must be submitted in writing via fax (704-341-2641) or e-mail (confirm@frallc.com)
- If we receive your request to cancel 30 days or more prior to the conference start date, your registration fees will be refunded minus a $350 administrative fee.
- If we receive your request to cancel between 29 days and the first day of the conference you will receive a credit for the amount of the original registration fee, less a $350 administrative fee.
- Credit vouchers are valid for 12 months from the date of issue and can be used either by the person named on the voucher or a colleague from the same company. Vouchers issued can only be redeemed once and have no residual value.
- No refunds or credits will be granted for cancellations received after a conference begins or for no-shows.

### 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 Daniel Smallwood at dsmallwood@ark-group.com or by telephone at 312 212 1301.

### Who Will Attend This Forum

Competitive Intelligence in the Modern Law Firm is developed for those interested in expanding their knowledge base of CI in various roles and functions, including but not limited to: managing partners, practice group leaders, directors of marketing and business development, directors of library services, client, professional, and practice support thought leaders, knowledge management professionals, information resources, records management and anyone else involved in coordinating or leveraging resources within these firm functions—including attorneys.

### 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.
Competitive Intelligence in the Modern Law Firm

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

September 27, 2018— New York, NY

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.

If you require overnight accommodations for this conference please contact any of the following nearby hotels to check their best available rate over the conference time frame. Please note that ARK GROUP has not negotiated rates with any of these hotels.

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45 W 44th St
New York, NY 10036
#212-354-8844

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44 West 44th St
New York, NY 10036
#212-869-4400
https://www.morganshotelgroup.com/originals/originals-royalton-new-york

The Algonquin Hotel, Times Square
59 W 44th St
New York, NY 10036
#212-840-6800

Club Quarters Hotel, Midtown
40 West 45th St
New York, NY 10036
#203-905-2100

Cassa Hotel 45th Street
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New York, NY 10036
#212-302-8700
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