Ark Group’s 11th Annual

**Competitive Intelligence in the Modern Law Firm**

*Balancing opportunity and risk by leveraging intelligence that informs strategic decision-making—expanding the competitive horizon beyond competing law firm practices*

Register by July 15, 2017 to Receive Your 15% Early-Bird Discount!

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**How much do we actually know about our direct competitors?**

Who are they exactly and what types of work are they winning from our key clients?

While law firms have gotten much better at developing and using client, market and industry intelligence, few firms are truly focusing on what their key competitors are doing, and how to position themselves accordingly; especially in connection with developing the firm’s most important clients.

Success equates to keeping the firm relevant to the changing nature of its economic environment—and particularly the needs of its clientele. External market conditions are changing—as well as internal firm culture, particularly with respect to expectations of the CI function.

All organizations are faced with challenges in leveraging available tools and methodologies that foster a more efficient way to produce and deliver key pieces of data and intelligence. How can we best manage, parse, and utilize this information to help develop actionable intelligence that creates a true competitive edge for our respective firms?

Ark Group’s 11th 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).

This year’s conference will explore some of the greater challenges and opportunities inherent to our shifting legal business ecosystem—while illustrating how effective CI can help firms to engage in an evolution reshaping the business of law.

**We hope you will join us,** along with your industry peers this September 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!

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**Featuring Key Contributions and Candid Viewpoints from:**

- Wendy L. Bernero, Partner, *Bernero & Press*
- Bob Robertson, Head of US Marketing & Business Development, *Freshfields Bruckhaus Deringer LLP*
- Robyn Radomski, Chief Marketing, Strategy & Business Development Officer, *Bingham Greenebaum Doll LLP*
- W. Allen Fuqua, Chief Marketing Officer, *Winstead PC*
- Mark Gediman, Director of Research Services, *Best Best & Krieger LLP*
- Patricia Ellard, Competitive Intelligence Manager, *Pepper Hamilton LLP*
- Mark T. Greene, Ph.D., President, *Market Intelligence LLC*
- Christopher Batio, Chief Marketing and Business Development Officer, *Brinks Gilson Lione*
- Sanjiv N. Kripalani, Director of Business Development, *Lane Powell*
- Sarah N. Rosen, Associate General Counsel, *Union Square Hospitality Group*
- Nathaniel Slavin, Partner & Founder, *Wicker Park Group*
- Mark Medice, Senior Director New Initiatives, *Intapp*
- And Others!

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September 28, 2017
New York, NY
**Ark Group's 11th Annual**

**Competitive Intelligence in the Modern Law Firm**

Program Agenda: Thursday, September 28, 2017

8:30AM  Registration & Refreshments

9:00AM  **Introductions Conference Chairperson**
Mark Medice, Senior Director New Initiatives, Intapp

9:10AM  **KEYNOTE ADDRESS**

**The Next Frontier: Data Visualization & Accessibility**

Like most areas of human endeavor, we climb the mountain and reach the summit—only to learn how many peaks we still must scale. Such is the case with data in the law firm world. Firms have moved the needle from **limited data to too much data** in the span of a few short years—creating a new dilemma: how do we make data more accessible? How can it tell stories, teach and inform our lawyers and firm leaders in ways that will advance our firms and the profession as a whole?

One answer to this conundrum lies in data visualization—i.e. the presentation of data in a pictorial or graphical format that enables decision makers to quickly identify patterns and grasp concepts or scenarios. This opening discussion will identify high-impact questions that need answers, as well as both how and why an “information map” with graphical visualizations of relevant data can turn our vast data landscape into something much more useful and actionable.

Wendy L. Bernero, Partner, Bernero & Press

9:45AM  **CASE STUDY**

**Creating an Actionable and User-Friendly CI Report... That Will Be Read**

The researched data is now sitting on your computer and you’ve drawn some interesting conclusions. Now comes the big challenge: conveying this to your audience. Putting together a report is a delicate balancing act between providing enough and too much information, and communicating your conclusions concisely. A successful report will communicate insightful analysis quickly and intuitively. Taking a Case Study approach, Mark Gediman will examine the process of compiling a CI report that will be read. Attendees will be taken step-by-step through the report creation process. Discussion will include structuring the report, presenting data for a specific audience and using strategic goals of the firm to make the report relevant, useful and actionable.

Mark Gediman, Director of Research Services, Best B & Krieger LLP

10:25AM  **Morning Coffee Break**

10:45AM  **CASE STUDY**

**Mitigating Competitive Blind Spots: The Development and Use of Competitor Intelligence to Drive a More Proactive Key-Client Approach**

How much do we actually know about our direct competitors—who are they exactly and what types of work are they winning from our key clients? Which ones present opportunities for us? While law firms have gotten much better at developing and using client, market and industry intelligence, few firms are truly focusing on what their key competitors are doing, and how to position themselves accordingly; especially in connection with developing their most important clients. In this illuminating discussion, attendees will have an opportunity to work through a mock case study that will demand answers to some difficult questions concerning our competitive blind-spots and advantages. The discussion will focus on competitors from a holistic perspective including investment priorities, talent acquisition, profitability, geographic expansion, conflicts, business development approaches, as well as the alignment of charitable, pro bono and philanthropic programs.

Bob Robertson, Head of US Marketing & Business Development, Freshfields Bruckhaus Deringer LLP

11:30AM  **CASE STUDY**

**Building Internal Credibility and Authority with Primary Research**

With the wonderful current options of CI using technology-based content services, many organizations pay short attention to its most valuable kind of CI: primary research. The job of primary research is gathering competitive information and points of view from the people we care about most: our clients and our target clients. There are various ways to do this but most of the challenge is to bake it into the various client facing opportunities and feedback processes that a firm generates. In this segment, attendees will discuss some of the various methods that can be used to generate this valuable information and why this type of research builds marketing’s authority.

W. Allen Fuqua, Chief Marketing Officer, Winstead PC

12:15PM  Networking Luncheon

1:15PM  **PANEL DISCUSSION**

**Fine-Tuning the CI Function Within Law Firms**

The purpose of the law firm CI function is to provide tangible insights to the firm (and its attorneys within various practice or industry groups) concerning opportunities and threats in specific regions or markets, impacting the firm’s ability to expand relationships with clients and make faster and more informed decisions. With institutional knowledge about the internal and external information needs of the practice and the firm, CI professionals are uniquely positioned to help their firm’s attorneys adapt and innovate. Success equates to keeping the firm relevant to the changing nature of its economic environment—and particularly the needs of its clientele. External market conditions are changing—as well as internal firm culture, particularly with respect to expectations of the CI function. It can be difficult gaining insight so to the specific sort of intelligence that is actually needed within the firm (or practice)—and what attorneys need is not always going to be what they are asking for. This interactive panel discussion will highlight tactics, successes and failures concerning how CI professionals interact with, and gain meaningful feedback from the firm’s attorneys with respect to the value and relevance of the intelligence provided (and how to better distill relevant information from a seemingly boundless well of available data). All organizations are faced with challenges in leveraging available tools and methodologies that foster a more efficient way to produce and deliver key pieces of data and intelligence. How can we best manage, parse, and utilize this information to help develop actionable intelligence that creates a true competitive edge for our respective firms? Empowerment, visibility, and leadership are all necessary if we are to play a key role in helping our firms achieve its strategic goals.

Robyn Radomski, Chief Marketing, Strategy & Business Development Officer, Bingham Greenebaum Doll LLP, Patricia Ellard, Competitive Intelligence Manager, Pepper Hamilton LLP, Christopher Batio, Chief Marketing and Business Development Officer, Brinks Gilson Lione

2:00PM  **DISCUSSION**

**Competitive Intelligence and Artificial Intelligence: Replacing Us or Making Us Better?**

CI done right requires an insightful human analyst to come to those “eureka” moments that add greatest value in business decision-making. Is that about to change? Artificial Intelligence (broadly defined to include augmented intelligence, machine learning, big data, expert systems, etc.) is prognosticated to imminently cause everything from the end of the world to a world of leisure and productivity.

Reality is probably somewhere in between, but pretty much everyone agrees that it is coming on FAST and that it will substantially change many aspects of legal services. In this forward-leaning discussion, Dr. Greene will explain what AI is, how it’s most likely to be manifest in the legal industry, and how it may change how we conduct CI and the quality of our work (better, faster, cheaper?).

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

2:45PM  **Afternoon Coffee Break**

3:15PM  **CLOSING PANEL DISCUSSION**

**Measuring & Delivering Value that Drives True Differentiation**

Value is increasingly the differentiator that drives client loyalty, expanded work and increased opportunities for law firms. A systematic approach to understanding clients’ needs and the use of rigorous analytics are keys to delivering value. This insightful panel discussion will feature perspectives from all sides of the lawyer-client relationship and deconstruct best practices, tactical strategies and real world examples.

Sarah N. Rosen, Associate General Counsel, Union Square Hospitality Group, Sanjiv N. Kripalani, Director of Business Development, Lane Powell, Nathaniel Slavin, Partner & Founder, Wicker Park Group

4:00PM  **Q&A/Closing Remarks Conference Chairperson**
Mark Medice, Senior Director New Initiatives, Intapp

4:30PM  **End of Conference**
# Competitive Intelligence in the Modern Law Firm 2017 (NY)

## 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.

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.

## 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.

## Registration/Admission

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

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## Registration Form

**Attendee 1**

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### Signature

I have read the terms and conditions below

- [ ] Registration/Admission (law firms) $995
- [ ] Registration/Admission (corporate/in-house) $495
- [ ] Admission for Vendors/Solution Providers $1495

- [ ] I am registering for this event before **July 15th** and would like to claim my 15% early bird discount! ($845.75)

**Register online at:** [www.ark-group.com](http://www.ark-group.com)

**Ark Group**

333 W. North Ave
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Ark Group has a financial aid policy to provide CLE programs for certain qualifying attorneys who are unable to attend due to cost considerations. For further information please contact Peter Franken at *pfranken@ark-group.com* or 312-212-1301.
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 28, 2017 — 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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