Ark Group’s 10th 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*

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**How has the law firm CI function evolved** in the space of 10 years (since Ark Group began hosting this annual conference)? Law firm marketing and business development functions have undergone significant changes in the wake of the 2008 economic downturn. In some firms these functions have already begun to mature in their new incarnations. They adopt a strong client focus, integrating multiple processes, tools and teams, and are moving away from the usually inward-focused nature of service support in the legal profession. This sea change presents a challenge and opportunity for the CI function; as CI can, and should be, front and center of this transformation.

While some firms are starting to embrace the broad use of “Competitive Intelligence” in support of their business development efforts, it can be said that there’s still much work to do in understanding what different types of intelligence can offer in the business development context, as well as how that intelligence can seamlessly inform the sales process.

Ark Group’s 10th annual **Competitive Intelligence in the Modern Law Firm** conference will once again provide an ideal platform for discussion and benchmarking around 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).

Attendees of this year’s conference will take stock of how the law firm CI function has evolved over the last decade – beginning with our expectations 10 years ago. We will then look ahead to the next decade: How will (or should) our roles in law firm management evolve? What do we do today that will no longer be necessary (or potentially replaced by emerging technology)? What KPIs will be most important (i.e. what will be firms’ critical risk management decisions)? And what external, market/industry trends will demand our attention (e.g., artificial intelligence and big data, cyber-security, globalization, commoditization)?

**Competitive Intelligence is more than data points.** The need for multifaceted CI has grown beyond mere objective data. In a hyper-competitive marketplace, understanding the unique drivers that cause clients to become deeply loyal is what defines the most successful client relationships.

**Which business strategy will benefit your firm most?** It cannot simply be selling clients the same services that other law firms offer. The challenge is to create new client demand for services that only your firm can deliver. But in order to succeed, leadership will need competitive intelligence that delivers insights far beyond those offered by information-for-sale.

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**With Key Contributions & Real-World Illustrations from:**

- Mark T. Greene, Chief Marketing Officer, Lewis Roca Rothgerber LLP
- Emily Cunningham Rushing, Director of Competitive Intelligence, Haynes and Boone, LLP
- Robert J. Robertson, Director of Strategic Business Development, Cadwalader, Wickersham & Taft LLP
- Milosz Skrzypczak, Director, Market & Competitive Intelligence, Osler, Hoskin & Harcourt LLP
- Lori A. Ruckstuhl-Clar, Associate Director of Competitive Intelligence, Drinker Biddle & Reath LLP
- Jennifer Schroth Tusche, Associate Director of Library Services, Drinker Biddle & Reath LLP
- Jennifer Manton, Chief Marketing and Business Development Officer, Kramer Levin
- Geoffrey R. Goldberg, Chief Advancement Officer, McCarter & English LLP
- Karen Dunning, VP, Chief Administrative Office (CAO) Operations, Motorola Solutions
- Lauren Trapp, Principal Program Manager, Motorola Solutions
- Dave Whiteside, Senior Business Development Specialist, Thomson Reuters
- Nancy Furman Paul, Commercial Product Manager, Bloomberg Law
- And others!
Assuming the firm has an initiative in place at all. Given the growing investment in place. However, many firms still face a strategic disconnect (whether cultural or operational) insofar as the proper execution and leveraging of these programs assumes the firm has an initiative in place at all. Given the growing investment across various intelligence functions in law firms today, it is perplexing to see that many firms are still struggling with the gathering of competitive information and points of view from the people we care about most—our clients! If the merits of having a sound client feedback initiative in place is nearly considered a truism at this point, then why are law firm marketing and business development professionals meeting resistance to the concept? And what can we do to further drive the evolution of a more multifaceted CI function, that’s focused more than objective data?

Jennifer Manton, Chief Marketing and Business Development Officer, Kramer Levin, Geoffrey R. Goldberg, Chief Advisor, cement Officer, McCarter & English LLP, Others TBD

1:45PM PANEL DISCUSSION
Experience and Relationships: The Only True Differentiators (and the Basis of Client Loyalty)
Experience is essentially the product your firm sells, while relationships define the manner in which you sell and service the client. Do you have a clear picture of who (in your own firm) has a strong relationship with a client or target, let alone competing firms? How can we pitch a piece of work if we do not know this critical data? As well, having the ability to articulate and prove that you have the relevant experience the client needs to solve the issue (relative to other lawyers and firms) is also a critical piece of Competitive Intelligence. These may be the only true differentiators we have - yet so few firms have this information cataloged, searchable and pitch-able. Many things can fall under the umbrella of Competitive Intelligence. But only experience and relationships can truly differentiate one firm or lawyer from another in the client’s eyes. This dynamic panel discussion will feature perspectives from both the client and the law firm, as we discuss the basis of client loyalty and how effective CI can be used to analyze information about the external market concerning who has the relationships, who has historically performed the work, what firms have the requisite experience to compete and how we position our experience and relationships to win the business.
Karen Dunning, VP, Chief Administrative Office (CAO) Operations, Motorola Solutions, Lauren Trapp, Principal Program Manager, Motorola Solutions, Dave Whiteside, Senior Business Development Specialist, Thomson Reuters

2:30PM CASE STUDY
Seamlessly Integrating Competitor, Business and Market Intelligence in Business Development and Client Retention
While some law firms are starting to embrace the broad use of “competitive intelligence” in support of their business development efforts, it can be said that there’s still much work to do in understanding what different types of intelligence can offer in the business development context, as well as how that intelligence can seamlessly inform the sales process. Little thought, as well, has been given to how the intelligence gleaned from competitor, business and market data can be used to retain those clients that took so long to acquire. Through a series of thought provoking case studies, this session will present a working model of how competitor, business and market intelligence can be used effectively to strategically inform and direct the sales process, and ultimately lead to increased client satisfaction and retention.
Robert J. Robertson, Director of Strategic Business Development, Cadwalader, Wickersham & Taft LLP

3:00PM CASE STUDY
CI for Technology Innovation in Law Firms: Leveraging the CI Function to Support Vision and Strategy for Technology Innovation
Emily Cunningham Rushing, Director of Competitive Intelligence, Haynes and Boone, LLP

3:45PM CLOSING PANEL DISCUSSION
How the CI Function Needs to Evolve in Law Firms... (in order for it to translate into sustainable competitive advantage)
Marketing and Business Development functions have undergone significant changes following the 2007 economic downturn. In some firms these functions have already begun to mature in their new incarnation. They adopt a strong client focus, integrating multiple processes, tools and teams, and moving away from the usually inward-focused nature of support services in the legal industry. This sea change presents a challenge and opportunity for the CI function; as CI can, and should be, front and center of this transformation. This, however, demands some key organizational and functional modifications that involve the dismantling of internal silos with client and prospect touchpoints integrated into a coherent, end-to-end solution (these activities include but are not limited to business and marketing analytics, CRM, pricing, proposals, and client satisfaction interviews). The CI function should also be relocated from the back to the front office, so it’s as close to practitioners as possible, providing an opportunity for CI to develop a thorough understanding of the practitioners business. Attendees will discuss and synthesize concepts from the day’s agenda within the context of this closing discussion--with panelists sharing examples of their own journey, approach and frameworks used to create a comprehensive and connected view of the client.
Milosz Skrzyczek, Director, Market & Competitive Intelligence, Osler, Hoskin & Harcourt LLP, Others TBD

4:30PM Wrap-Up Discussion/Closing Remarks
Nancy Furman Paul, Commercial Product Manager, Bloomberg Law
Ark Group’s 10th Annual CI Conference (SEPT 29 - NY)
Competitive Intelligence in the Modern Law Firm

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I have read the terms and conditions below

☐ Registration/Admission $895
☐ 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! ($760.75)

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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 does not use your email address or information for any purpose other than distributing our conference and event notices.

Venue and Accommodations
This conference will be held at:
The SUNY Global Center located at 116 East 55th Street (between Park and Lexington Ave) in the SUNY Global Classroom—a state-of-the-art facility with tiered, in-the-round seating. For more details, please contact Peter Franken at pfranken@ark-group.com or by phone 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 sponsorship opportunities for this event, please contact Kevin Klein for more details at kklein@ark-group.com or by phone at 312 212 1302.
Ark Group’s 10th Annual

Competitive Intelligence in the Modern Law Firm

THIS CONFERENCE WILL BE HELD AT:

The SUNY Global Center
The State University of New York
116 East 55th Street
(Btw. Park and Lexington Ave)
New York, New York 10022
http://global.suny.edu/building/brochure/globalclassroom.cfm

This conference will take place in the Global Classroom—a state-of-the-art facility with tiered, in-the-round seating, and power and microphones at the desktop fostering seamless interaction between speakers and audience members.

Hotels within walking distance to the conference venue:

Marriott Courtyard New York Manhattan/Midtown East
866 Third Avenue
New York, NY 10022
212.644.1300
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New York, NY 10022
212.752.7000
www.metropolitanhotelnyc.com/

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New York, NY 10022
212.753.5800
www.omnihotels.com/FindAHotel/
NewYorkOmniBerkshire.aspx

Club Quarters Rockefeller Center
25 West 51st Street (off 5th Avenue opposite Rockefeller Plaza)
New York, NY 10019
212.262.3200
www.clubquarters.com/loc nyRockefellerCenter.aspx

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2 East 55th Street
212-753-4400
Reservations
Directions, Maps & Other Details...

SUNY Global Center
116 East 55th St.
(Btw. Park and Lexington Ave)
New York, NY 10022
212-317-3500

Directions to the SUNY Global Center from primary arrival points in NYC:

**Grand Central Terminal** (MTA Metro-North Railroad): The Global Center is a .75-mile walk North on Park Avenue.

**Pennsylvania Station** (Amtrak, Long Island Railroad, New Jersey Transit): Take a Queens-bound E subway train to the "Lexington Avenue-53rd Street Station". Alternatively it is a short taxi ride or a 2.0 mile walk.

**Port Authority Bus Station**: Take a Queens-bound E subway train to the "Lexington Avenue-53rd Street Station". Alternatively it is a short taxi ride or a 1.5 mile walk.

**Parking**: The Global Center does not have its own parking facility. However, there are numerous parking garages in the area. Rates fluctuate, but you can expect to pay about $40 per day.

*Rates for all garages in the neighborhood vary greatly by day of the week and timing. You may want to use this website to find the most reasonable rates for your particular needs: Bestparking.com -- under "City", click New York, and then can click to neighborhoods or cross street; can plug in arrival and departure times; site will calculate rates and show icons with $ amounts on a map. Click the icons to show specifics.*

Local Restaurants near the SUNY Global Center:

**American**

Houston's / Hillstone 153 E. 53rd St (At 3rd Ave) 212.888.3828 [www.houstons.com]

**Asian / Sushi**

Asian Station 155 E 52nd St (between Lexington Ave & 3rd Ave) 212.421.2294 [asianstationyc.com]

Tenzan 988 Second Ave. (bet. 52nd & 53rd Sts.) 212.980.5900 [www.tenzanrestaurants.com]

Lychee House E. 55th St. (bet Park and Lexington Ave.) 212.753.3900 [www.lycheehouse.com]

Peking Duck House 236 E. 53rd St (bet 2nd & 3rd Ave) 212.759.8260 [www.pekingduckhousenyc.com]

**French (Bistro)**

La Mangeoire 1008 Second Ave. (bet. 53rd & 54th Sts.) 212.759.7086 [www.lamangeoire.com]

Deux Amis 356 E. 51st St. (bet. 1st & 2nd Aves.) 212.230.1117

Jubilee 347 E. 54th St. (bet. 1st & 2nd Aves.) 212.888.3569 [www.jubileeny.net]

**Indian**

Dawat 210 E. 58th St. (bet. 2nd & 3rd Aves.) 212.355.7555 [www.dawatresteraurant.com]

**Italian**

Bar Vetro 222 E. 58th St. (bet. 2nd & 3rd Aves.) 212.308.0112 [www.vivolonyc.com]

Bice Ristorante 7 E. 54th St (bet Madison & 5th Ave) 212.688.1999 [www.bicenewyork.com]

Casa Lever 390 Park Ave (between 53rd St & 54th St), 212.888.2700 [www.casalever.com]

Fiorini 209 E. 56th St (bet 2nd & 3rd Ave) 212.308.0830 [www.fiorinirestaurant.com]

Montebello 120 E 56th Street (between Park and Lexington), 212.753.1447 [www.montebellonyc.com]

Serafina 38 E. 58th St. (bet. Madison & Park Aves.) 212.832.8888 [www.serafinarestaurant.com]

**Lebanese**

Naya 1057 Second Ave. (bet. 55th & 56th Sts.) 212.319.7777 [www.nayarestaurants.com]

**Mediterranean / Greek**

Ethos 905 1st Ave (At 51st St) 212.888.4060 [www.ethosrestaurants.com]

Fig & Olive 10 E. 52nd St. (bet. 5th & Madison Ave) 212.319.2002 [www.fig-and-olive.com]

**Mexican**

Dos Caminos 825 Third Ave. (bet. 50th & 51st Sts.) 212.336.5400 [www.brguestrestaurants.com]

**Steakhouse**

Maloney & Porcelli 37 E. 50th St (bet. Madison & Park Ave) 212.750.2233 [www.maloneyandporcelli.com]