

Ark Group's:

# Mid-Sized Law Firms: Start the Revolution in the Middle

*Why mid-sized law firms may be the key to transforming the legal service delivery model*

**REGISTER TO ATTEND BEFORE APRIL 5TH, 2019 — TO RECEIVE YOUR  
15% EARLY-BIRD DISCOUNT!**

**May 23rd, 2019  
Chicago, IL**

## Are mid-sized law firms in a unique position to compete?

Some view this segment as facing challenges in scale, footprint and unable to afford the latest technological capabilities. Others see it as an agile, fleet-footed group able to provide tailored services with a strong personal touch—and one where firms can exploit mid-sized scale to be more responsive and tuned-in to the clients they serve.

Ark Group's *first-ever* conference focused on **Mid-Sized Law Firms** will consider, discuss and debate the unique competitive position that mid-sized firms find themselves in today – and why mid-sized firms may be the key to transforming the legal service delivery model.

This unique event will bring together individuals who can help law firm leaders sort through the confusion of how to compete in this exponential age— shining a light on the conditions leading to unprecedented activism by law departments, identifying what's broken in the service delivery model, understanding not only the mindset of the client, but also the tools and strategies they are employing to better control their own spend/destiny – and finally, illustrating the immense opportunity for nimble organizations to meet the demand for real innovation and service.

The legal service model (at present) seems to be stuck—which has given rise to new entrants into the legal market and increased competition. For mid-sized firms (which includes some regional shops of considerable size) there is both *opportunity*—because corporate legal departments see that these firms can do excellent work at much lower hourly rates—and *challenge*—because "law companies" (i.e. alternative legal service providers) have the necessary process, technology, and project management skills on the ready.

In most instances, mid-size firms know much more about the law than alternate service providers, but can they learn the process and leverage the technology? What impact will tools and technology have on the "redesign of the law firm service model" and how accessible and scalable are today's tools and platforms?

Mid-sized law firms may feel caught in the crossfire between Big Law, alternative legal service providers and their clients. If so, they may be missing a remarkable opportunity. The door has opened for some mid-sized firms to move in aggressively and take market share. And this opportunity has only just begun...

## PARTNERS & SPONSORS:



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

**John Alber**, Futurist at International Legal Technology Association & Institute for the Future of Law Practice

**Fred H. Bartlit, Jr.**, Partner, Bartlit Beck LLP

**Marci A. Eisenstein**, Managing Partner, Schiff Hardin LLP

**Jeff Sharp**, Managing Partner, Marshall, Gerstein & Borun LLP

**David A. Krutz**, Managing Partner, Michael Best & Friedrich LLP

**Robert Romanoff**, Chairman & Managing Partner, Levenfeld Pearlstein

**Nancey Watson**, NL Watson Consulting Inc.

**Joseph J. Morford**, Managing Partner, Tucker Ellis LLP

**Murray Coffey**, Chief Marketing Officer, Haynes & Boone, LLP

**Stephanie Scharf**, Partner, Scharf Banks Marmor LLC

**Chris Austin**, Director of Records & Information Management, Bowman and Brooke

**Andrea Maciejewski**, Chief Marketing and Client Engagement Officer, Levenfeld Pearlstein

**Jeremy Gresham**, Chief Financial Officer, Levenfeld Pearlstein

**David Urbanik**, Chief Operating Officer, Halloran Sage

**Michael Mills**, Co-Founder & Chief Strategy Officer, Neota Logic

**Mark Medice**, Principal, LawVision LLC

**Anand R. Upadhye**, VP of Business Development, Casetext

**Tom Jones**, CEO/President, Iridium Technology

**Justin Brownstone**, VP of Sales/Litigation Counsel, Gavelytics

# Mid-Sized Law Firms: Start the Revolution in the Middle

## Conference Agenda: May 23rd, 2019

8:30AM Registration & Networking Breakfast

---

9:00AM Opening Remarks - Conference Chairperson

---

9:15AM KEYNOTE ADDRESS

### Why Not Start the Revolution in the Middle?

It's bad enough that demand for legal services has been flat for years. But our clients are bad-mouthing us too. In survey after survey, chief legal officers bitterly complain about the unwillingness of law firms to embrace change, to try to understand their clients' businesses, and to respond with improved service levels and pricing. Clients are acting on these complaints, too. They have been putting unprecedented pricing pressure on firms, have introduced procurement and project management disciplines into their regimen, have moved increasing amounts of work both in house and to alternative legal service providers and have created organizations like CLOC to sharpen the effectiveness of all these measures. In this battle, mid-sized firms may feel caught in the cross fire between Big Law and clients. If so, they may be missing a remarkable opportunity. Big Law has been like an old-time telco in responding to client complaints—ponderous and bureaucratic. That has opened the door for some mid-sized firms to move in aggressively and take market share. And that opportunity has only just begun. There are ample resources available to help mid-sized firms level the playing field in competing with Big Law. And there are many creative business models—from Bartlit Beck's to Partnervine with which to seize those opportunities. In this keynote, legal futurist and acclaimed legal service innovator John Alber will explore the opportunities that are available to nimble, entrepreneurial mid-sized firms.

John Alber, Futurist at **International Legal Technology Association & Institute for the Future of Law Practice**

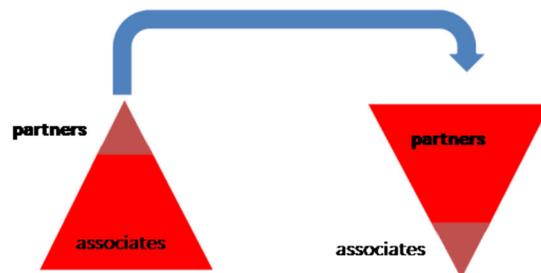
---

10:00AM CASE STUDY

### Turning the Law Firm Pyramid Upside Down

An analysis of why a smaller, partner-heavy business model is more conducive to producing high-quality legal services than the current prevailing Pyramid model.

Fred H. Bartlit, Jr., **Partner, Bartlit Beck LLP**



10:45AM Morning Networking & Coffee Break

---

11:15AM PANEL DISCUSSION

### THE JANUS CHALLENGE – BIGLAW, MID-SIZE, AND BOUTIQUES

Introduction: IANVS (Jānus), is the god of beginnings, gates, transitions, time, duality, doorways, passages, and endings. He is usually depicted as having two faces, since he looks to the future and to the past. In this lively discussion, we are going to present competing views: of BigLaw, Mid-Size, and Boutiques – and what we believe are the advantages and disadvantages of each. Panelists will discuss how firms of various sizes and strengths can put themselves in position to win more business and effectively compete in various markets by virtue of focusing on various levers of quality and/or service and delivery models.

Joseph J. Morford, Managing Partner, **Tucker Ellis LLP**  
Murray Coffey, Chief Marketing Officer, **Haynes & Boone, LLP**  
Stephanie A. Scharf, Partner, **Scharf Banks Marmor LLC**  
**Moderator: Nancey Watson, NL Watson Consulting Inc.**

---

12:00PM Networking Luncheon

---

CONTINUED...

**EARLY-BIRD DISCOUNT:** Register before **April 5th**  
and take advantage of a 15% discount (for teams or individuals)!

# Mid-Sized Law Firms: Start the Revolution in the Middle

## Conference Agenda: May 23rd, 2019

- 
- 1:00PM** PANEL DISCUSSION  
**Mid-Sized Law Firms: Competitive and Innovation Strategies - Looking Back and for the Next Ten Years**  
In today's law firm environment, mid-sized law firms are in a unique position to compete. Some view this segment as one facing challenges in scale, footprint and unable to afford the latest technological capabilities. Others see it as an agile, fleetfooted group able to provide tailored services with a strong personal touch, and one where firms can exploit mid-sized scale to be more responsive and tuned-in to the clients they wish to serve, using new approaches to the practice. In this panel, three managing partners from forward-looking firms will discuss their strategies, thoughts on innovation, and how they think about the competitive marketplace, managing change to transform their practices, and views on data and other technologies changing the practice for the next ten years.
- Marci A. Eisenstein, Managing Partner, **Schiff Hardin LLP**, Jeff Sharp, Managing Partner, **Marshall, Gerstein & Borun LLP**, David A. Krutz, Managing Partner, **Michael Best & Friedrich LLP**, Robert Romanoff, Chairman & Managing Partner, **Levenfeld Pearlstein** - **Moderator**: Mark Medice, Principal, **LawVision LLC**
- 
- 2:00PM** PANEL DISCUSSION  
**Tools & Tech: The Extent to which Technology Can Help Level the Playing Field**  
AmLaw, Citi/Hildebrandt and other market studies all show stratification - the top 20 have pulled away from the pack. For mid-sized firms (which includes some "regional" shops of considerable size) there is both *opportunity* – because corporate legal departments see that these firms can do excellent work at much lower hourly rates—and *challenge*, because "law companies" (i.e. alternative legal service providers) have the necessary process, technology, and project management skills. In most instances, mid-size firms know much more about the law than alternate service providers—but can they learn the process and leverage the technology? What impact will tools and technology have on the “redesign of the law firm service model” and how accessible and scalable are today's tools and platforms? In this discussion, attendees will hear from several different solution providers, as they discuss and debate these challenges and opportunities for the mid-sized law firm.
- Anand R. Upadhye, VP of Business Development, **Casetext**, Tom Jones, CEO/President, **Iridium Technology**, Justin Brownstone, VP of Sales/Litigation Counsel, **Gavelytics** - **Moderator**: Michael Mills, Co-Founder & Chief Strategy Officer, Neota Logic
- 
- 2:45PM** **Afternoon Networking & Coffee Break**
- 
- 3:15PM** CASE STUDY  
**We're Ready to be Innovative! Now what!?**  
This case study will focus on drumming up interest, evaluating, purchasing, and rolling out an innovative tool. We've all seen the sharp demos, but what discrete steps can we take to figure out if we want to subscribe to a new product? This session covers a mid-size firm's subscription to an innovative product, including the challenges they faced purchasing and rolling the technology out and how they overcame those challenges. This presentation will provide actionable takeaways from a mid-size firm that is modernizing in an industry that can be resistant to change.
- Chris Austin, Director of Records & Information Management, **Bowman and Brooke**
- 
- 3:45PM** CASE STUDY  
**Using Data to Back Up Firm Assumptions about its Competitive Advantage**  
In an industry that is rapidly changing comes an increased pressure to develop, communicate and report on our perceived competitive advantages. Law firm professionals are then faced with a million daily decisions, options, ideas and pressures about where to invest our time and money. How can either of these be accomplished without tying our work to data and financial metrics? Chicago law firm Levenfeld Pearlstein's CFO and CMO developed a decision- making matrix that helps law firm leaders decide where moves and investments will have the biggest impact on margin and profitability of an area of law, practice group and ultimately, a firm.
- Jeremy Gresham, Chief Financial Officer, **Levenfeld Pearlstein**,  
Andrea Maciejewski, Chief Marketing and Client Engagement Officer, **Levenfeld Pearlstein**
- 
- 4:15PM** CASE STUDY  
**Differentiation & Innovation – Enabled by Culture**  
Compared to other professionals and the populace in general, lawyers score unusually high and low in several personality traits. They include skepticism (high), autonomy (high), sociability (low) and resiliency (low). This mix of personality traits results in a high degree of risk aversion and resistance to change. These traits can be a real barrier to innovation. Overcoming them requires establishing a new frame of reference which encourages people to think, feel, and act differently. This session will describe how one firm with a broad array of practice areas used a structured approach to define and build consensus around a common vision, purpose, values and brand promise. In doing so, they have created a culture and a set of tools which enables and promotes broad collaboration and innovation. Moreover, they have found a way to leverage the untapped leadership potential of not only their attorneys but all employees of the firm.
- David Urbanik, Chief Operating Officer, **Halloran Sage**
- 
- 4:45PM** Closing Remarks: Conference Chairperson
-

# Mid-Sized Law Firms: Start the Revolution in the Middle

## May 23rd, 2019 — Chicago

	Attendee 1	Attendee 2	Attendee 3
<b>Name</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Job Title</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Organization</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Address</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Zip Code</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Phone</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Fax</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Email</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>

**Signature**

I have read the terms and conditions below

- Conference Registration (law firms) \$995.00
- Registration for vendors/solution providers \$1,295.00
- EARLY-BIRD DISCOUNT:** I am registering before **April 5th** and would like to claim my 15% early bird discount! (\$845.75)

**\*\*\*Team Discounts: 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:**

**Name on Card:**

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](mailto: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.

### Venue and Accommodations

Ark Group's **Mid-Sized Law Firms: Start the Revolution in the Middle** will be held at the University of Chicago's Gleacher Center - located at 450 North Cityfront Plaza Drive, Chicago, IL 60611— in the heart of Chicago's business community. For more details please contact Daniel Smallwood at 312 212 1301—or by email at [dsmallwood@ark-group.com](mailto:dsmallwood@ark-group.com)

### Who Will Attend This Conference

Ark Group's **Mid-Sized Law Firms: Start the Revolution in the Middle** is designed for thought leaders interested in the structural dynamics of service delivery, client experience, technology and outcomes – and its impact on the greater competitive landscape. This conference is ideal for Executive Directors, Managing Partners, Practice Group Leaders, Pricing Directors, Business Analysts, CIO's, CFO's, COO's, CMO's, CKO's and anyone else involved in financial analysis, matter management or process improvement initiatives within law firms and legal departments.

### 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](mailto:kklein@ark-group.com) or by phone at 312 212 1302

# Mid-Sized Law Firms: Start the Revolution in the Middle

## Venue Information

### THIS PROGRAM WILL BE HELD AT:

#### The University of Chicago - Gleacher Center

450 N. Cityfront Plaza Drive  
Chicago, IL 60611  
312.464.8787  
<http://www.gleachercenter.com/>

The Gleacher Center is conveniently located in the heart of Chicago's business community just blocks away from the Loop and steps away from Magnificent Mile shopping, restaurants and hotels. It is easily accessible from public transportation and adjacent parking lots.

#### The following hotels are located just a few blocks from the Gleacher Center...

##### [Loew's Chicago Hotel](#)

455 North Park Drive  
Chicago, IL 60611  
Phone: 312-840-6600 Reservations: 877-868-8232

##### [Sheraton Chicago Hotel & Towers](#)

301 E. North Water Street  
Chicago, Illinois 60611  
1.877.242.2558 > Reservations

##### [Embassy Suites Chicago ~ Downtown/Lakefront](#)

511 N. Columbus Drive  
Chicago, Illinois 60611  
312.836.5900 > Reservations

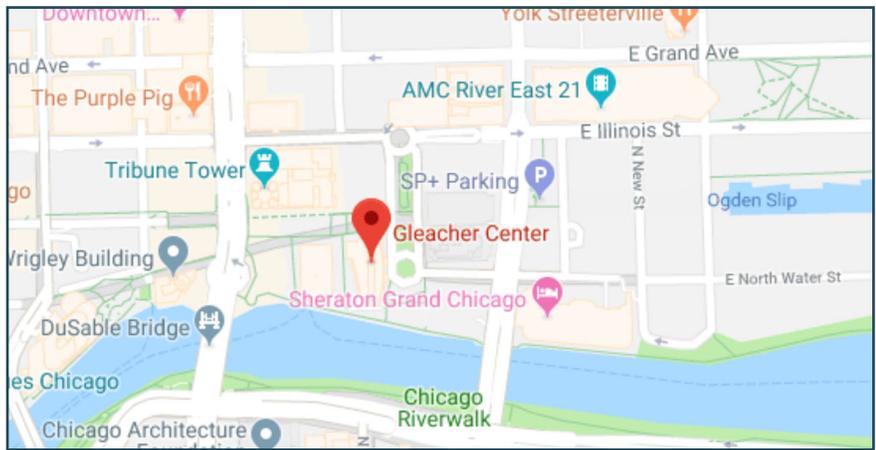
##### [InterContinental Chicago](#)

505 N. Michigan Avenue  
Chicago, Illinois 60611  
1.312.944.4100 > Reservations

##### [Chicago Marriott Downtown](#)

540 N. Michigan Avenue  
Chicago, Illinois 60611  
312.836.0100 > Reservations

For a complete list of Chicago hotels please visit:  
<http://www.choosechicago.com/chicago-hotels>



### Directions to The Gleacher Center

#### FROM O'HARE AIRPORT (ORD)

**TAXI:** The taxi stand can be found just outside the baggage claim area. Cab fare will be approximately \$35 and you should allow one to one-and-a-half hours.

**CTA TRAIN (THE "EL"):** The Blue Line of the Chicago Transportation Authority train system, commonly known as the "El" or elevated train, runs from O'Hare to the Loop area downtown. Follow airport signs reading "Trains to City" to the Blue Line boarding area. Buy a fare card from vending machines and board a train going towards the Loop.

#### FROM MIDWAY AIRPORT (MDW)

**TAXI:** A taxi stand is located right outside the baggage claim area. Cab fare will be approximately \$30, and you should allow 30 to 45 minutes.

**CTA TRAIN (THE "EL")** The Orange Line of the "El," or elevated train, runs from Midway Airport to the Loop area downtown. To take the train, follow airport signs reading "Trains to City" to the Orange Line boarding area. Buy a fare card from vending machines and board the next available train. The train ride is about 30 minutes.

**EARLY-BIRD DISCOUNT:** Register before **April 5th**  
and take advantage of a 15% discount (for teams or individuals)!