LMASW REGIONAL CONFERENCE 2023

ROLLIN SERVICE RIVER

Composing Our New Rhythm



"Rollin' on the River: Composing Our New Rhythm," will bring together over 100 legal marketing and business development professionals in the Big Easy for a workshop-style conference. Attendees will take away skills and tools that deliver an immediate impact in their day-to-day functions in the areas of:

- **☼** Business Development **♪** Business of Law
- **✓** Client Services **✓** Communications
- Marketing Management and Leadership
- Technology Management

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LMASW 2023 **CONFERENCE CO-CHAIRS**



Morgan Leigh Horvitz



Laura SillarsChief Marketing Officer,
Adams and Reese

COMMITTEE MEMBERS



Brett NapierBusiness Development Manager,
Jones Walker



Elizabeth BrickBusiness Development Manager,
Baker Donelson



Jordan Fowler
Director of Business Development
and Attorney Development,
Beck Redden



Holly McCleary Content Specialist, Jackson Walker



Mary Stephens McGinnis Group Marketing Manager, Winstead



Brittany LewisMarketing Manager,
Bell Nunnally

WELCOME MESSAGE FROM PRESIDENT

Welcome to the 2023 LMA Southwest Regional Conference! On behalf of the conference committee, we look forward to hosting the SouthBEST community at this year's conference, which promises to be a fun, informative, and energized gathering.

Attending an LMA Regional Conference is a special opportunity. The connections made and the information and tips shared among peers make for an invaluable experience. Throughout your time during the conference, I encourage you to engage in interesting discussions, participate in skill-building workshops, and network with your peers and industry leaders at the forefront of legal marketing innovation.

I'd like to thank the members of the committee for all of their hard work putting together this fantastic event. True to our theme, "Rollin' on the River: Composing Our New Rhythm," we hope you leave with invaluable lessons learned and resources that deliver an immediate impact in fostering change in our day-to-day functions.

Lastly, I want to say "thank you" to our amazing sponsors, whose support enabled us to put on this conference. I encourage all of you to visit these fantastic organizations, learn about their services, and discuss how they can help you solve challenges and achieve your goals!

Welcome to New Orleans and Laissez les bons temps rouler!

Brett Napier LMASW President





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Southwest Conference

WEDNESDAYSeptember 13





Al & Content

Marketing Leadership



1:30 pm - 4:30 pm

Pre-Conference Programming

Join us on Wednesday, September 13 for a Pre-Conference Program split into two tracks: Al & Content and Marketing Leadership.

- The **Al & Content** track will take place at Baker Donelson
- The Marketing Leadership track will take place at Jones Walker

Office Building Location: 201 Saint Charles Ave., New Orleans, LA 70170



Al & Content

Workshop



1:30 pm - 2:25 pm

29 Digital Marketing Tactics

Preconference: Al & Content Track

Aggressively growing firms leverage the cutting edges of technology to fine tune their marketing growth engine and eat up marketing share from those watching on the sidelines. Learn advances in automation – deeper reporting accuracy – improve conversion rates with creative financing – customized customer experiences – 1:1 video based email – replacing intake data entry – content strategy analysis – marketing data integration – and the importance of both self-reported and automated marketing channel attribution modeling.

Body of Knowledge: Technology Management



Conrad SaamPresident, Mockingbird



Marketing Leadership

Expert Panel



1:30 pm - 2:25 pm

Increasing Productivity Through Self-Care and Teamwork

Preconference: Marketing Leadership Track

Taking time for self-care is important to overall productivity. Understanding and celebrating your team's de-stressors can help bring the team closer together and help solidify team bonds and increase productivity. This works for marketing/BD teams as well as lawyer teams. The panel made up of a consultant, a corporate manager, and a law firm director will be commenting on the science behind self-care improving productivity in the workplace and providing specific examples of programs that can help improve the productivity of your team and help combat ever-higher rates of burn-out. Commented on in Business.com, "Self-care is used to improve physical, mental, and emotional health – a combination that is essential for staying productive over a long period of time. Stress is a hazard of the workplace and costs business more than \$300 billion a year, according to Stress.org."

Body of Knowledge: Marketing Management and Leadership



Cecilia R. LintonDirector, Society 54



Glynna MayersPublic Affairs Manager, Dow



Jamie Dawson
Director of Business Development and Marketing, US,
Sidley Austin LLP



Al & Content

Expert Panel



2:25 pm - 3:20 pm

Al for Comms: What You Need to Know Now

Preconference: Al & Content Track

New developments in generative artificial intelligence (AI) cannot be ignored. While ChatGPT, DALL·E 2 and others create opportunities, there are also tremendous legal and practical risks associated with their use. This interactive and engaging session covers how

these new technologies could change and impact how law firm marketers do their work by analyzing examples from actual searches.

Topics covered include:

- The use of Al tools: work smarter, not harder
- Where we are in the evolution of AI technology in law firms
- Benefits and pitfalls of ChatGPT and its competitors
- The intersection of Al and ESG: establishing guardrails for engaging Al tools to proactively manage reputation and preserve value"

Body of Knowledge: Communications



Marketing Leadership

Workshop



2:25 pm - 3:20 pm

From Stagnant to Soaring: 3 Drivers of High-Growth Law Firms

Preconference: Marketing Leadership Track

Law firms are facing numerous challenges, such as intense competition for top talent, emergence of game-changing Al technologies and clients who demand high-value services for a lower cost. What can legal marketers do to stand out and achieve success in this environment?

The 2023 Hinge study revealed that high-growth firms are outpacing No Growth firms by 4.5x, even in the face of uncertainty and risk.

Join us for a deep dive into the latest trends on firm growth strategies, high functioning talent teams and automated workflow.

Body of Knowledge: Business of Law



Elena Cutri

Director, Client Education Services, LexisNexis



Rachel Haaland Watson

Director of Business Development, Client Development & Campaigns, Akin



Al & Content

Expert Panel



3:30 pm - 4:25 pm

Building Content for the New Reality of Distracted Attention: Adapting Your Long-Form Content Into Moment-Based Experiences

Preconference: Al & Content Track

We live in an age where every audience member is unique and distracted. People consume content according to their preferences, habits, and situations. People are multi-tasking and busy. They are getting deluged with content.

As a marketer, how do you find gaps in your audience's world that you can tap into? How can you engage people in the few moments that they are willing to spend? If attention is fractured, how can you create content to fit in those gaps?

In this expert panel, two masterful marketers share their real-life experience of creating moment-sized content for distracted audiences. They will discuss their journey of using Al to take a well-known tactic (webinars) and adapting it to moment-based experiences; in a unique, easy and cost-effective way to expand your ROI. They will also share their experiences and lessons learned, the good and the bad of using Al, aligning your team and constantly refining the tactics.

Body of Knowledge: Communications



Nathalie Daum

Director of Marketing & Business Development,

Dickinson Wright PLLC



Piyush Saggi CEO, Parmonic



Ren TaylorDirector of Product Marketing, Heretto



Marketing Leadership

Case Study



3:30 pm – 4:25 pm

Amid Competition, Collaboration: How Law Firms Can Work Together to Achieve More

Preconference: Marketing Leadership Track

Even as law firms compete for clients and market share, there are valuable and meaningful ways to collaborate on shared priorities. This program explores a successful multi-firm collaboration that will inspire participants to seek out similar opportunities.

Case Study: In 2020, the five largest Denver-based law firms jointly launched the Denver Law Firm Coalition for Racial Equity.

- Three years in, Coalition firms co-host client events, support DEI-focused organizations, collaborate on marketing campaigns and collateral, and even travel together nationally to recruit diverse attorneys to Denver.
- Rather than compete over diverse talent, the five firms work together to sell Denver as the destination. The firms agree that everyone wins as Denver becomes more diverse.

The program will:

- Briefly present the Coalition's origins;
- Explore how the group navigates different firm cultures and politics to collaborate effectively;
- Highlight how marketers and recruiters work together across firms; and
- Identify key ingredients for success.

Breakout: Following the case study, participants will brainstorm possible collaborations in their firms and markets. Areas may include DEI but could also encompass technology, client service, community service, events, and more. Groups will record and share ideas to help participants think beyond their four walls and consider dynamic possibilities.

Body of Knowledge: Business of Law; Marketing Management and Leadership



Matt Plavnick
Director of Client Development,
Wheeler Trigg O'Donnell LLP

5:30 pm - 7:00 pm

Welcome Reception

THURSDAY September 14



10:00 am - 10:15 am

10:15 am - 11:15 am

Networking Break

 $\mathsf{Track}\,\mathsf{A}$

Workshop

Registration and Expo Hall Opens

Featured Session

8:30 am - 10:00 am

7:30 am - 5:00 pm

Welcome + Keynote

Featuring Tracy LaLonde, Chief Joychiever

The 2023 LMA Southwest Region Conference begins with welcome remarks by President Brett Napier and Conference Co-Chairs Morgan Horvitz and Laura Sillars, followed by a keynote by Tracy LaLonde.

The Joychiever Journey

Do you wish you could achieve all your goals and have more joy in your life? Don't wait to be happy. Change your life today.

"High achieving professionals often fall prey to the 'Once I..." syndrome. Once I work hard enough to land the right job, get promoted, send the kids to college, and make enough money, THEN I can relax and enjoy my life."

As a high achiever, you have developed so many valuable skills. You know how to set goals and achieve them. You practice discipline and hard work to propel yourself forward. You are motivated to learn and grow skills. You can make tough decisions when required.

What if you applied those skills also to the pursuit of joy? Rather than simply being a high achiever, could you become a "Joychiever?"

It is possible to achieve AND have joy simultaneously.

With a deep understanding of what makes you uniquely joyful, you can make choices that facilitate living your best life—both work and personal.

Through '7 True Self Stops', The Joychiever Journey provides a roadmap for you to learn when to choose for work and when to choose for joy. It helps you to find balance, rather than automatically choose work by default.

Body of Knowledge: Marketing Management and Leadership



Tracy LaLondeChief Joychiever | Workforce Engagement Expert

Modernize Your Media Strategy: Five Aspects of Law Firm PR to Update for 2023 and Beyond

Breakout Sessions #1

Competition for law firm media coverage has intensified, and the outlets from which to earn it have shrunk. Firms are issuing a steady stream of press releases and frenetically posting content, but is it landing anywhere? The rise of national "hub" and regional "spoke" coverage models has made news holes even smaller, but the payoff for landing coverage has never been more impactful.

This workshop will explore five key aspects of law firm communications that have changed dramatically in recent years and the new ways of thinking about and approaching law firm media strategy.

- Modernizing your media approach What today's reporters, editors and producers need from law firms and lawyers and how to think about the new reporting models to maximize coverage potential.
- Making your website newsfeed/newsroom work harder Delivering key messages to various stakeholders consistently and evolving your messaging over time.
- Embracing shared media (and sparing your local reporters) Defining the role of and approach to social media and making the most of it.
- Leveraging paid editorial options for extended reach, education and credibility.
- Measuring impact Emerging approaches to evaluating the payoff from PR that speak to law firm management.

Body of Knowledge: Communications



Jennifer Simpson Carr
Vice President, Strategic Development
Furia Rubel Communications



Lauren Michaud KnottsSr. PR and Communications Manager,
McGlinchey Stafford



Traci StuartPresident/CEO, Blattel Communications

Track B

Workshop

10:15 am - 11:15 am

Becoming a Better Legal Marketer: How to Go From Doing to Thinking Strategically and Asking the Right Questions

Breakout Sessions #1

So often, the marketing team is hit with a volume of requests and first worries about getting them all done. Instead of just completing a task, be sure to stop and add value. This session will take legal marketers through a variety of endeavors, including asking the right questions. Learn how to enhance your events, legal alerts, client meetings, social media, proposals, and lateral integration by thinking about strategy and not just logistics. Becoming a better and more strategic legal marketer will add value to your team, as well as appreciation for what legal marketers do for attorneys.

Body of Knowledge: Marketing Management and Leadership



Alycia Sutor Managing Director, GrowthPlay



Josie Morgan Chief Operating Officer, Boyar Miller



Whitney Hutchens
Senior Business Development Manager,
Hunton Andrews Kurth

11:15 am - 11:30 am

Expo Hall / Networking Break

11:30 am - 1:00 pm

Spotlight Lunch Session: Regional Your Honor Awards

A successfully executed project requires time, creativity, teamwork, and innovation. Join us for our LMASW Your Honor Awards (YHA) program recognizing creativity, execution, achievement and overall excellence in legal marketing across a range of categories that align with LMA's Body of Knowledge.

Track A

Workshop

1:00 pm - 2:00 pm

Al in Law Firm Marketing: How to Do More with Less Using Al

Breakout Sessions #2

Artificial Intelligence (AI) has been steadily revolutionizing various industries, and the legal sector is no exception. The advent of AI in law firm marketing is not only changing the way firms operate but also redefining their marketing strategies. Consequently, law firm marketers must adapt to these new technologies to stay ahead of the competition. In this one-hour workshop, Jessica Aries will walk through how legal marketers can use free AI tools to streamline their marketing communications efforts and better leverage the data they already have to improve their marketing communications and digital marketing efforts. BONUS: AI wrote this session description.

Body of Knowledge: Communications; Technology Management



Jessica AriesDigital Marketing Strategist & Consultant, By Aries

Track B

Expert Panel

1:00 pm - 2:00 pm

Pricing to the Client: How to Differentiate Your Offer

Breakout Sessions #2

The session will cover a discussion and tips on how to assess your clients' needs, and how to provide a pricing proposal that meets their legal and budgetary needs. It will also include a discussion on how to present a pricing offering that stands out and differentiates your firm from the competition.

Body of Knowledge: Business of Law

2:00 pm - 2:30 pm

Expo Hall / Networking Break

Track A

Workshop

2:30 pm - 3:30 pm

Be Linked IN or Be Left OUT: Why and How Lawyers Need to Come Out of the Shadows to Make Their Profiles and Their Presence Known

Breakout Sessions #3

Research shows that GC and C-Suite execs are looking to LinkedIn now more than ever. The survey differences between 2019 and 2022 are drastic. GCs, C-Suite execs, referral sources, media, and other influencers are there, they are more observant, they have grown to value LinkedIn users' content, and are using the platform as a credible source when researching outside counsel. They are also paying attention to lawyer profiles and recommendations.

This session will not only help you understand which changes are important enough for you and your lawyers to pay attention to, and which to ignore, but will also help you understand the best way for lawyers to learn and follow through with an effective and efficient LinkedIn networking plan.

Topics to be discussed include:

- The Pandemic Effect: How everything changed overnight
- How LinkedIn has become a platform for "creators"
- How to help your lawyers understand where they fit in the Creator Economy, and how they can find their place on the platform
- Based on LinkedIn algorithms TODAY, what are the tools that will help maximize lawyers' time on LinkedIn?
- How to structure LinkedIn training so your lawyers will effectively incorporate this
 critical networking tool into their business development plans and efforts

Body of Knowledge: Business Development



Nancy Myrland
Marketing & Business Development Advisor,
Myrland Marketing & Social Media



Susan HuntMarketing Director, Hendershot Cowart P.C.

Track B

Workshop

2:30 pm - 3:30 pm

Marketing and Lateral Attorney Collaboration: A Guide to Being Intentional and Effective Day One

Breakout Sessions #3

Law firms do – and should – bear the responsibility of efficiently managing a lateral attorney's effective integration into a new law firm. Marketing and Business Development Teams write thorough lateral integration plans, Practice Management Teams schedule strategic meetings connecting a lateral to existing attorney partners, and Finance Teams work to transfer portable client files. All of these integration tactics are spearheaded by the lateral's new law firm and are crucial elements of a lateral's integration process. With strategic growth being a core operating tenet for a majority of law firms, law firm professionals managing integration efforts find themselves overseeing an increasing class of lateral attorneys, which in some cases, impedes a preferred comprehensive integration experience. With this in mind, lateral attorneys are encouraged to be empowered in actively partnering in, and better yet actively contributing to, their integration efforts.

This presentation will provide a sampling of proactive tactics a law firm marketing professional can task to / request of an incoming lateral attorney, in collaboration with their marketing team, to support an efficient, thorough and productive integration into their new law firm and role.

Example of tactics discussed include:

- 1. Integration efforts begin before day one at your new firm.
- 2. Make time dedicated and focused time for your Marketing and Business Development Team.
- 3. Read your integration plan and actively take the steps outlined.
- 4. Partner with Marketing on your external promotion outreach.
- 5. Address issues and challenges head on.

Body of Knowledge: Business Development



Amy VerhulstSenior Business Development Manager, Jackson Lewis PC



Lauren UditBusiness Development Coordinator, Saul Ewing LLP



Shannon LombardoDirector of Business Development, Saul Ewing LLP

Track A

TED Talk

3:30 pm - 4:30 pm

TED Talks on Mentorship and Converting Personal Relationships

Breakout Sessions #4

TED Talk #1

Understanding Mentorship and Building Your Personal Advisory Board

Presented by Michael Blachly, Gray Reed

This presentation offers benefits to the employee and to the mentor/supervisor. Almost everyone at some point in their career is asked to be a supervisor or mentor. But rarely is anyone trained or given any guidance on how to be an effective mentor. Often, career counseling discusses how you are doing in your current position but does not address what you need to do to be ready for the next stage of your career. In this presentation we will be discussing what makes for effective mentorship, the different types of mentorship and understanding the importance of laying those bread crumbs for the next stage. We will also discuss the importance of building a personal advisory board, which is a group of individuals that can support you in your career.

Body of Knowledge: Marketing Management and Leadership

TED Talk #2

Getting Out of the Friend Zone: Converting Personal Relationships Into Clients

Presented by David Ackert, PipelinePlus

Oftentimes, the business potential in a lawyer's personal relationships remains untapped because they are uncomfortable broaching the topic of doing business. The fact is that unless lawyers learn how to initiate easy, no-pressure business conversations, they will not fully benefit from the friends, law school classmates, or family members who are most invested in their success. In this program, you will discover how to coach your lawyers with communication techniques that explore professional opportunities with personal connections.

Body of Knowledge: Marketing Management and Leadership

Track B

3:30 pm - 4:30 pm

TED Talk

TED Talks on Content and the Intersection of Technology and Business Development

Breakout Sessions #4

TED Talk #1

Lassoing Your Content: Be Curious and Believe

Presented by Sarah Minjoe & Amy Trevino, Dykema

Great content ideas can come from anywhere and some of the best ideas come from the least likely sources. How do you find that next piece of content gold? Be curious and BELIEVE.

During this session, attendees will learn why it's more important than ever to stand out from the crowd with non-traditional content. Using real-life examples, we'll review best practices highlighting ways leading AmLaw 150 firms (primarily LMASW) have used innovative content to be distinctive in the legal market. We'll also provide key takeaways attendees can put into action today to develop their next unique content campaign. Using the popular TV series Ted Lasso as inspiration, the session itself will be an example of creative programming intended to inspire thinking outside the box.

Body of Knowledge: Communications; Business Development; Technology Management

TED Talk #2

Future-Proofing Your Firm's Growth: The Intersection of Technology and Business Development in 2023

Presented by Pamela Tobias, LexisNexis & Jennifer Klyse, Fireman & Company

This is an interactive discussion on what exists at the Intersection of Business Development & Technology, what successful Legal Marketing Technology looks like, how you define a successful CRM and Biz Dev program, and how you change behaviors to make sure the program is successful. This program includes sample peer firm success stories, results, and lessons learned.

Body of Knowledge: Marketing Management and Leadership

5:30 pm – 6:30 pm

Thursday Evening Happy Hour

FRIDAY

September 15

8:00 am - 12:00 pm

Registration and Expo Hall Opens

9:00 am - 9:15 pm

Welcome & Highlights from Day 1



Featured Session

Working in Concert to Elevate Your Brand and Position

Given the amount of noise and chaos in the legal world these days, it should surprise no one that personal branding has taken center stage. Whether you are new to the industry and looking to grow your career or a seasoned roadie looking to take the next step in your world tour, personal branding is the answer. However, with so many different opinions and tunes floating around, it can be hard to know where to begin. How do you know which lyrics are right for you? How can you ensure your brand is coming across as clearly as possible? How do personal branding strategies impact your professional development and how can you work to ensure all members of your band are singing your praises? Luckily, there are answers. Hear from three seasoned legal marking and business development professionals who have recently crowd surfed their way into C-suite roles at new firms by not only relying upon their skills and experience, but the support and contributions of their backup singers and fans.



Andrew Laver

Chief Marketing & Business Development Officer, Porzio Bromberg & Newman, P.C.



Michelle Friends

Chief Operating Officer, Keker, Van Nest & Peters LLP



Nikki Girard Sherrill

Chief Business Development Officer, Parker, Hudson, Rainer & Dobbs

10:15 am – 10:30 am

9:15 am - 10:15 am

Expo Hall / Networking Break

LMASW 2023

10:30 am - 11:30 am

Law Firm Leadership

The panel will focus on horizon scanning at law firms and the role marketing and business development to strategically drive change and meet those challenges and opportunities on the horizon.

Body of Knowledge: Marketing Management and Leadership; Business Development



Adam Severson Chief Marketing & Business Development Officer, **Baker Donelson**



Managing Partner, New Orleans, Jones Walker LLP



Managing Partner, Adams and Reese LLP



Patrick Fuller Vice President, Legal Intelligence, ALM

11:30 am - 12:00 pm

Closing Remarks







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