



The Thomson Reuters Legal Executive Institute & Lexpert

present

In Medias Res:
Preparing Yourself for the Future of Law Practice

June 19, 2018

The Thomson Reuters Customer Centre
Bay Adelaide Centre
333 Bay Street, Floor 29
Toronto, ON

Co-Chairs

Terra Rebick, *Chief Counsel, Canada*, Thomson Reuters
Judith McKay, *Chief Client and Innovation Officer*, McCarthy Tétrault LLP

Program (all times local)

8:00am - 9:00am

Registration and Breakfast

9:00am – 9:15am

Opening Remarks

9:15am - 10:30am

On Stranger Tides: Understanding the Client of the Future

As the global legal services market continues to evolve, the ability of practicing lawyers—no matter how senior their position—to consistently engage clients and win work remains a critical factor in distinguishing tomorrow’s rainmakers from their peers. Law firm clients, emboldened by expectations around value and transparency, want their firms to anticipate and address a wide swath of concerns emblematic of a world in flux. But are outside counsel *truly* prepared to deliver? This opening conversation offers a robust assessment of emerging client pain points that will help law firm practitioners better anticipate the needs of their customers and stand out from the competition.

Moderator:

Jan Anne Dubin, *Principal*, Jan Anne Dubin Consulting

Panelists:

Alida Gualtieri, *Director, Business Development, Marketing & Communications – Montreal*, Davies Ward Phillips & Vineberg LLP

Martin Halpern, *Director, External Counsel Management & Knowledge Advancement*, Royal Bank of Canada

Jonathan Leibtag, *Corporate Counsel, Corporate, External & Legal Affairs*, Microsoft Canada Inc.

Tanya Mushynski, *Vice President, Canada Gas & Union Gas Law*, Enbridge Inc.

- 10:30am – 10:45am** **Break**
- 10:45am – 12:00pm** **Transforming Legal Practices: Leveraging LPM Approaches to Enhance Efficiency and Client/Lawyer Satisfaction**
The incorporation of legal project management (LPM) into daily practice has continued to garner steam across the profession. In North America, to take only one example, some of the region’s most strategic practitioners are reaping the benefits of using LPM’s approaches to add value to their practices from a matter-level or client satisfaction standpoint. This presentation provides valuable guidance around incorporating LPM into your practice to enhance client relationships, win business and improve profitability of current matters.
- Moderator:
Terra Rebick, *Chief Counsel, Canada*, Thomson Reuters
- Panelists:
Rick Kathuria, *Director, PMO and Legal Logistics*, Gowling WLG
Judith McKay, *Chief Client and Innovation Officer*, McCarthy Tétrault LLP
Germán Morales, *Senior Legal Project Manager*, Norton Rose Fulbright
Paul-Erik Veel, *Partner*, Lenczner Slaght Royce Smith Griffin LLP
- 12:00pm – 1:00pm** **Networking Luncheon**
- 1:00pm - 2:15pm** **The Price is Right: Mastering Client Value Propositions in Legal Practice**
Being able to convey the value of your services for an appropriate price is a skill every lawyer needs to develop. Although some firms have pricing professionals who help facilitate this process, lawyers will have a much easier time winning work if they themselves understand the fundamentals of legal pricing and how to deliver an effective value proposition. This session adopts a pragmatic tone in identifying ways lawyers can deliver effective proposals *vis-a-vis* cutting-edge pricing strategies and techniques.
- Moderator:
Nancey Watson, *Principal*, NL Watson Consulting, Inc.
- Panelists:
Richard Brzakala, *Director, External Legal Services*, Canadian Imperial Bank of Commerce (CIBC)
Dwight Floyd, *Director of Pricing & Value*, Eversheds Sutherland (US) LLP
J. Scott Morgan, *Director – Legal Operations*, Air Canada
Carla Swansburg, *Chief Officer, Practice Innovation, Pricing & Knowledge*, Blake, Cassels & Graydon LLP
- 2:15pm – 2:30pm** **Break**
- 2:30pm – 3:45pm** **Approaching Inflection: Mastering Firmwide Resources in Practice Management**
If business development methodologies, legal project management, and matter-level pricing arrangements form the bedrock of modern-day legal service delivery, advances in technology are propelling lawyers forward in such areas as discovery, knowledge management (KM), and legal research. According to DWT De Novo architect R. Amani Smathers, today’s leading practitioners are “T-shaped” professionals with functional, cross-disciplinary knowledge to complement their legal backgrounds. This versatility, reasons Smathers, is how lawyers can best satisfy their clients. Our closing panel offers a comprehensive take on how 21st-century lawyers are leveraging in-house technologies to enhance their overall practice and realize gains around process and workflow.

Moderator:

Kimberly A. Stein, *Manager, Knowledge Management*, Thomson Reuters Legal

Panelists:

Andrea L. Alliston, *Partner, Knowledge Management*, Stikeman Elliott LLP

Dan Dagan, *Associate General Counsel, Commercial*, Siemens Canada Limited

Ginevra Saylor, *National Director of Knowledge Management*, Dentons Canada LLP

Eva Sommer, *Knowledge and Innovation Lawyer, Business Law*, Borden Ladner Gervais LLP

3:45pm – 4:45pm

Closing Remarks & Reception