



facilitating change in the legal profession

BOOKSTORE > LawPartnering™ Department

PROGRAM AGENDA

1st ANNUAL PARTNERING & CONVERGENCE FORUM: PROFITING FROM CLIENT COLLABORATION

Loews Santa Monica Beach Hotel, Santa Monica, California
December 9-10, 1999

SESSION 1

Conference Introduction

- Watershed changes in the legal profession
- On-going need to be more efficient in delivery and controlling costs of legal services
- Conference goals

Peter C. Jenkins
President
LawPartnering, Inc.
Prescott, Arizona

Convergence and Strategic Partnering: Key Concepts

- Defining the terms: Convergence and Strategic Partnering
- Origins and other applications (other than the legal industry)
- Advantages to the corporate client / benefits to law firm partners
- Characteristics of ideal partnering arrangements
- Dispelling common myths about convergence and partnering
- An honest look at convergence and partnering, including their limitations

Thomas F. O'Neil III
Chief Litigation Counsel MCI WorldCom, Inc.
Washington, DC

John C. Wyman
Partner
Murtha, Cullina, Roche, Carens & DeGiacomo
Boston, MA

SESSION 2

Conducting A Needs Analysis

- Practice areas and work loads that are particularly suitable to partnering arrangements
- Factors relevant to small companies / large companies with small legal departments
- In-house factors that contribute to partnering success
- Benchmarking
- How many law firms do you need? / what kind of firms? / locations?

W. Frederick Uehlein
President and Managing Director
Insurers' Recovery Group, Inc.
Natick, MA

Jonathan P. Bellis
Global Practice Leader
Law Firm & Law Department Consulting Group
PricewaterhouseCoopers LLP
New York, NY

SESSION 3

Creating the Law Firm Network

- Selecting your law firm partners
- Managing the selection process
- What to look for in partnering firms
- Developing reasonable expectations

William H. King, Jr.
Partner
McGuire, Woods, Battle & Boothe, LLP
Richmond, VA

Ann Lee Gibson, Ph.D
Ann Lee Gibson Consulting
Taos, New Mexico

SESSION 4

Keynote Address: "The Stanford Story: Redesigning How We Interact With Law Firm Partners."

Michael Roster
General Counsel
Stanford University and Stanford Medical Center
Stanford, CA

SESSION 5

Re-engineering Legal Work Processes for Successful Partnering

- Reassessing inside and outside relationships
- Principles that promote continuous improvement
- Early case assessment / designing programs that work
- Work process analysis / streamlining of procedures
- Balancing company involvement in services delivered against law firm autonomy

John H. Ogden
General Counsel / Corporate Secretary
Krupp Werner & Pfleiderer Corporation
Ramsey, NJ

Robert H. Peahl
Vice President
Risk Enterprise Management Limited
New York, New York

SESSION 6

Budgeting for Legal Services and Costs

- Law department costs
- Outside counsel costs
- Resolving tensions between internal and external budgets

Charles Strathman
Senior Deputy General Counsel
Unocal Corporation
El Segundo, CA

Howard J. Castleman
Partner
Murtha, Cullina, Roche, Carens & DeGiacomo
Boston, MA

SESSION 7

Partnering with Other Service/Litigation Support Providers

- Maximizing leverage through unbundling of services
- Efficiencies and cost advantages of centralizing retention of support services
- Examples of successful support services provider relationships

Brian Bowdren
Vice President
FTI Consulting, Inc.
Washington, DC

James Seidl
President
Legal Research Center
Minneapolis, Minnesota

James J. Seifert
Vice President, General Counsel and Corporate Secretary
Tennant Co.
Minneapolis, Minnesota

SESSION 8

Maintaining Your Law Firm Network

- Managing relationships
- Meetings dedicated to improving communications and performance
- Sustaining internal interest and involvement
- Training to enhance relationships and teamwork
- Performance reviews

James D. Shomper
Corporate Counsel and Manager, Law Firm Partnering
DuPont Legal
Wilmington, DE

SESSION 9

Ethical Considerations

- Conflicts of interest
- Issues relating to attorney-client privilege

Peter R. Jarvis
Partner and Chair, Professional Responsibility Practice Group
Stoel Reives LLP
Portland, OR

SESSION 10

Making the Paradigm Shift

- Changing the culture
- Getting buy-in from the internal client, staff and others
- Breaking old relationships.

Jim Holland
Senior Vice President – Business Development and General Counsel
Teletech Holdings, Inc.
Denver, CO

Sidney N. Herman
Managing Partner
Bartlit Beck Herman Palenchar & Scott
Chicago, IL

SESSION 11

Cost Reduction Initiatives And Efficiency Programs

- Fee arrangements that promote partnering objectives
- Keys to billing efficiency
- Alternative fee arrangements and how to structure them.

Hayward D. Fisk
Vice President, General Counsel and Secretary
Computer Sciences Corporation
El Segundo, CA

Robert H. Peahl
Vice President, Litigation Management
Risk Enterprise Management Limited
New York, NY

David M. Mason
Partner
Goldberg, Kohn, Bell, Black, Rosenbloom & Moritz, Ltd.
Chicago, IL

Philip R. Sellinger
Partner
Sills Cummis Radin Tischman Epstein & Gross, PC
Newark, NJ

SESSION 12

Technology as a Tool to Implement Law Firm/Client Partnerships

- How technology has actually been used to facilitate partnering relationships
- Keys to implementing technology systems in your network
- Emerging technologies that can lead to significant cost savings

O. Forrest Morgan
Partner
McGuire Woods, LLP
Richmond, Virginia

David Steensgard
Technology Research Manager
West Online, Technology Development Group
West Group
Eagan, Minnesota

SESSION 13

Metrics: Measuring the Success of Convergence and Strategic Partnering

- What should be measured
- Generating useful data
- Utilizing the information

James L. Snyder
Senior Vice President, Development
ARAG Group
Chagrin Falls, OH

Reese Morrison
Principal
Altman Weil, Inc.
Randolph, New Jersey

SESSION 14

Case Study: The DuPont Model - Six Years And Counting

James D. Shomper
Corporate Counsel and Manager, Law Firm Partnering
DuPont Legal
Wilmington, Delaware

SESSION 15

Case Study: Heller Financial, Inc. - Small And Large Law Firm Partners In An International Network

David M. Mason
Partner
Goldberg, Kohn, Bell, Black, Rosenbloom & Moritz, Ltd.
Chicago, Illinois

SESSION 16

Case Study: United Parcel Service - Big Company, Small Law Department

Bryan Brum
Attorney
United Parcel Service
Atlanta, Georgia

Summation and Adjournment

- Bringing it all together
- Conference handbook and audio/video tapes
- Partnering and convergence resources

Peter C. Jenkins
President
LawPartnering, Inc.
Prescott, Arizona

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