



## CBA Law Firm Leadership Conference: Client Value and Law Firm Profitability

October 26-27 | Westin Calgary

MONDAY, OCTOBER 26, 2015

8:00 | 9:00     **Registration and Breakfast**

9:00 | 9:05     **Welcoming Remarks**

9:05 | 10:30    **Shaken not Stirred: Legal Process Innovation**

By innovating legal process management, law firms can more efficiently handle standard work while freeing up senior lawyers to oversee strategy and other aspects of legal files requiring greater skill. Learn how to develop a model for a more efficient law practice, at once reducing costs, enhancing value for clients, offering your lawyers more satisfying work and improving law firm profitability. This session will focus on how to discern what clients really want, enhance communication both with clients and within your firm, deliver legal services consistently and efficiently, and effectively implement the change in culture in your law firm.

Speaker: **Carla Goldstein**, Associate General Counsel & Director of Strategic Initiatives, Legal, Corporate & Compliance Group, BMO Financial (Chicago)

10:30 | 10:45    **Refreshment Break**

10:45 | 12:15    **Prophets & Profits: Technology in the Modern Law Firm**

Law practice has changed, and is changing. Processes and pricing are now critical issues for law firm leaders and their partners. We know that technology is no longer just a supporting system. It is at the core of your firm's practice and relationships with clients. But how will these changes affect your decisions about technology? From this session you will learn how to analyze needs and select tools; what questions to ask your IT

professionals; the nature of your role as firm leader in IT decisions; and which technologies will be most critical one year, three years and five years in the future.

Speaker: **Michael Mills**, Co-founder and Chief Strategy Officer, Neota Logic Inc. (New York)

**Ray Sharma**, Executive Managing Director, Extreme Venture Partners (Toronto)

Facilitator: **Omar Ha-Redeye**, Principal, Fleet Street Law (Toronto)

**12:15 | 1:45**    **Lunch Address: *Speaker tbc***

**1:45 | 3:15**    **The Last Frontier for Law Firms: Value for Clients and Profitable Pricing**

Cost reduction and efficiency initiatives are all well under way and yet pricing is ironically the last of the client value and law firm profitability levers to be given serious consideration. Firms commonly fail to understand with sufficient granularity what their work costs to produce and what clients value (and will pay for), making pricing, at best, little more than guesswork and, at worst, damaging to profitability and the client relationship. This session will explore best practices in pricing legal services, and practical ways to reduce the tension in establishing pricing with clients through a more sophisticated application of pricing governance, analytics and execution.

Speaker: **Richard Burcher**, Managing Director, Validatum (UK) Limited (London)

**3:15 | 3:30**    **Refreshment Break**

**3:30 | 4:45**    **Client Value and Law Firm Profitability: Concepts at Odds or a Perfect Match?**

Richard Burcher and Carla Goldstein will lead the audience through an entertaining and informative debate on the pros and cons of new developments in legal process innovation and pricing.

Speakers: **Richard Burcher**, Managing Director, Validatum (UK) Limited (London)

**Carla Goldstein**, Associate General Counsel & Director of Strategic Initiatives, Legal, Corporate & Compliance Group, BMO Financial (Chicago)

Facilitator: **Omar Ha-Redeye**, Principal, Fleet Street Law (Toronto)

**5:00 | 6:30**    **Reception**

**TUESDAY, OCTOBER 27, 2015**

**8:00 | 9:00**    **Breakfast**

**9:00 | 9:05**    **Opening Remarks**

**9:05 | 10:30 Innovation Inc.: Case Studies on Innovation in Law**

It has been said that just as lawyers rely on precedent, the profession is mired in the past, unable to innovate. Hear from a few who have broken the mold - innovators who have created, designed and implemented practical, customized and forward thinking products for the legal profession. Join us for this thought provoking session with an eye on the future.

Panelists: **Peter Carayiannis**, President, Conduit Law (Toronto)  
**Noah Waisberg**, Co-founder & CEO, Kira (Toronto)  
**Asha Soares**, CFO/COO and Co-founder, Kabuk (Toronto)

Facilitator: **Gary Luftspring**, Ricketts, Harris (Toronto)

**10:30 | 10:45 Refreshment Break**

**10:45 | 12:15 Last word: A Conversation with the Buyers of Legal Services**

In-house purchasers of legal services will put the lessons learned from the conference in perspective. Hear their advice on how the sellers can best enhance their competitive advantage in the legal services market.

Panelists: **Kristine Delkus**, Executive Vice President and General Counsel, TransCanada PipeLines Limited (Calgary)  
**Gordon McCue**, Associate General Counsel, Global Litigation – Strategy & Coordination for Shell (Calgary)  
**Peter Feldberg**, Managing Partner, Fasken (Calgary)  
**Mike Milani**, Managing Partner, McDougall Gauley (Regina)

Facilitator: **Jordan Furlong**, Principal, Edge International (Ottawa)

**12:15 Closing Remarks**

**Accreditation:**

This program is accredited in most\* Canadian continuing professional development jurisdictions (CPD):

- Ethics, Professionalism and/or practice management content: 8.75 hours
- Substantive, skills and/or procedural content: --

*\* Accreditation applications to the following law societies are pending: British Columbia, New Brunswick and Saskatchewan*