

SCGLEGAL[®]

2026 ANNUAL MEETING
September 17-18 | Washington, DC



Board Candidates

Term 2027 - 2029



Jason Vitullo
Patterson Belknap Webb & Tyler
(US: New York, NY)

2027 BOARD OF DIRECTORS

- Mariano Batalla
ALTA Batalla (Costa Rica)
- Guillermo Bayas Fernandez
AGM Abogados (Spain)
- Hayley Buckley
Wynn Williams (New Zealand)
- Heather Harris
Barnes & Thornburg (US: Indiana)
- Marie-Claude Jarry
Dunton Rainville (Canada: Quebec)
- Frederik Kromann Jespersen
Skau Reipurth (Denmark)
- Matt Mathews
McGuireWoods (US: Virginia)
- Jonathan McCardle
Featherstonehaugh & McCardle (US: Albany, New York)
- Tom Pickthorn
Mills & Reeve (UK)
- Robert Rieger
Adams and Reese (US: Louisiana)
- Melissa Salhab Sykes
McGinnis Lochridge (US: Texas)
- John Tang
DHH (China: Beijing)
- Jason Vitullo
Patterson Belknap Webb & Tyler (US: New York, NY)
- John White
Beauchamps (Ireland)
- Susan Wissink
Fennemore (US: Arizona)

- **Chair:** Tom Pickthorn, Mills & Reeve (UK)
- **Vice Chair:** Susan Wissink, Fennemore (US: Arizona)
- **Secretary:** Melissa Salhab Sykes, McGinnis Lochridge (US: Texas)
- **Treasurer:** John White, Beauchamps (Ireland)
- **Past Chair:** Fabio Guzmán Saladin, Guzmán Ariza (US: Dominican Republic)

LAST BOARD MEETING

Kenneth Baldwin, Robinson+Cole (US: Massachusetts)

Celeste Bruce, Rifkin Weiner Livingston (US: Maryland)

SCGLEGAL[®]

2026 ANNUAL MEETING
September 17-18 | Washington, DC



**PARSONS
BEHLE &
LATIMER**

Utah -> Idaho
Jon Stenquist

Westfield Morocco

Wassim Benzarti

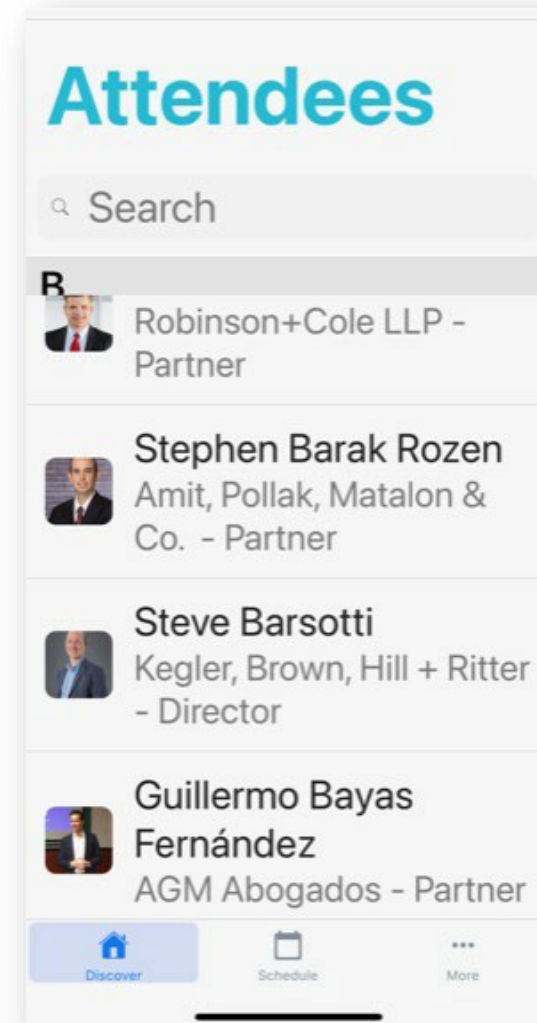
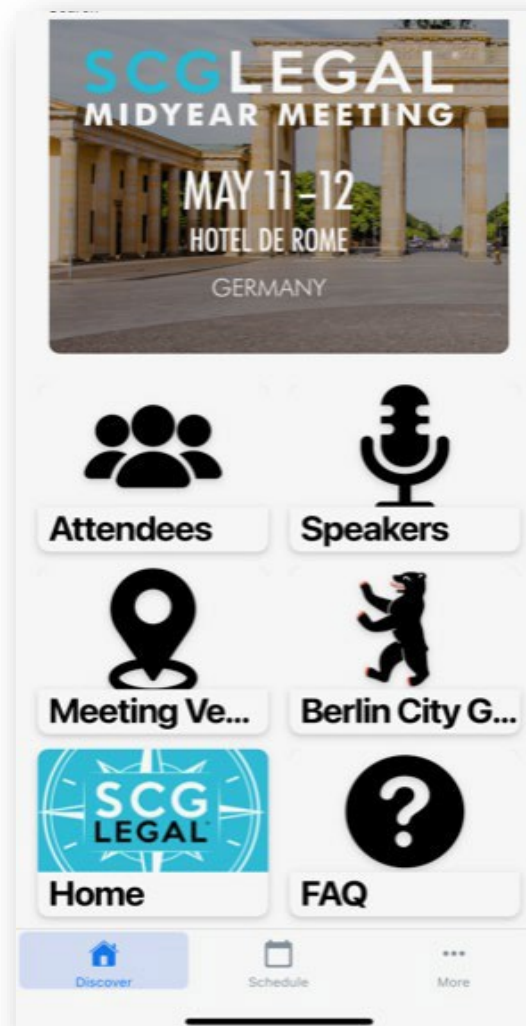
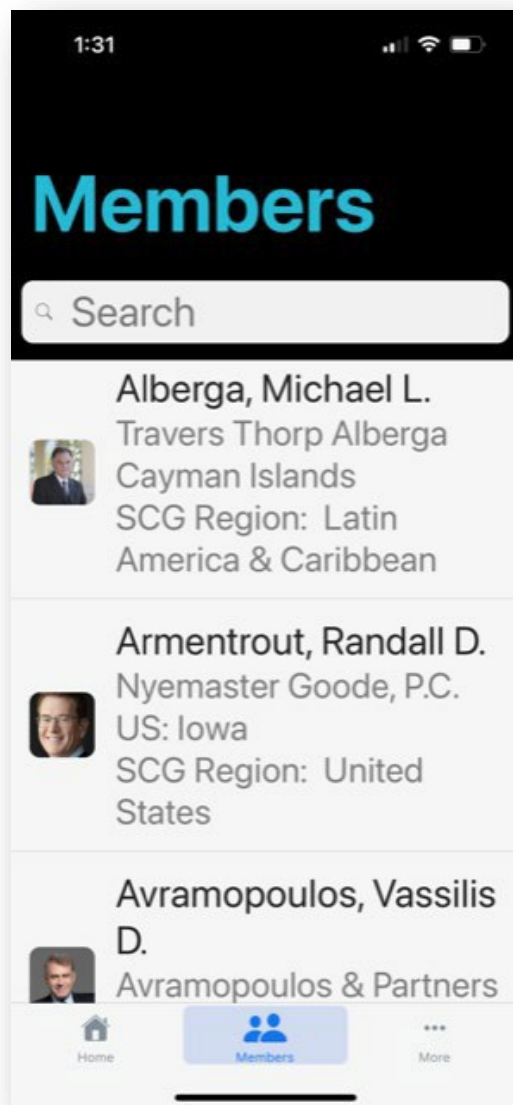
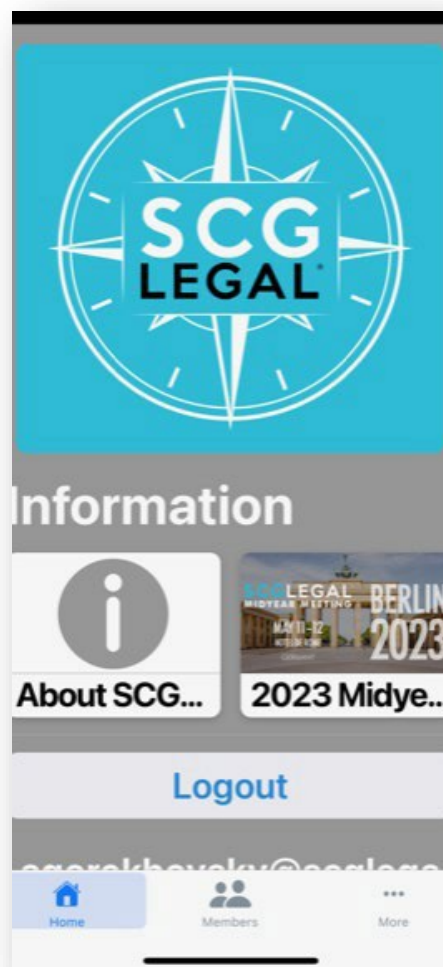
wiley

2026: YEAR IN REVIEW + 2027: YEAR AHEAD

2026

2027





Global Reach with Local Expertise 36 Years of Excellence

SCG Legal has been connecting premier independent law firms since 1989. Our network has grown into a powerful global alliance of trusted legal and public affairs partners.

65

Countries

*Comprehensive
global coverage*

125

Member Firms

*Independent, high-quality
law firms across the globe*

12,000+

Attorneys & Public Relations Professionals





Chambers
AND PARTNERS

Global Market Leaders
Leading Law Firm Networks:
THE ELITE

SCG MEMBER TOUCHPOINTS

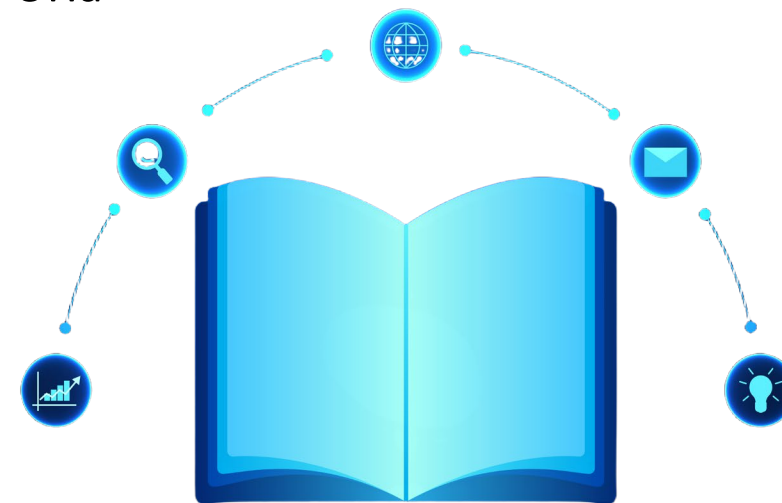


JURISDICTION GUIDES

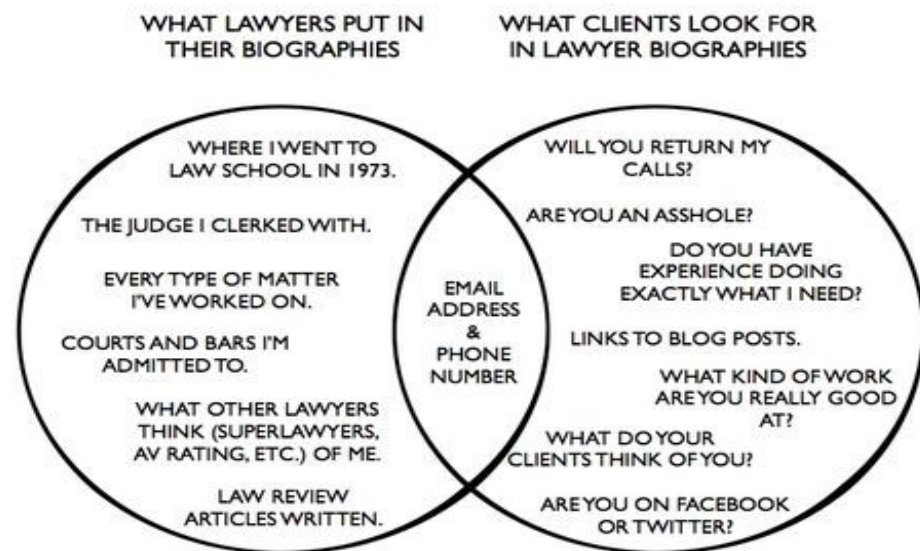
- [Market Entry App for Australia](#) by Hall & Wilcox (Melbourne)
- [Doing Business in Canada](#)
- [Conflict in Guatemala: Risks and Strategies](#) | Carrillo & Asociados
- [Doing Business in Latin America & Caribbean](#)
- [Doing Business in Peru](#) by Philippi Prietocarrizosa Ferrero DU & Uría
- [Doing Business in Vietnam](#) by Dilinh Legal

PRACTICE GROUP DIRECTORIES

- [Bankruptcy & Insolvency Handbook](#)
- [Corporate/Mergers & Acquisitions](#)
- [Data Protection, Privacy & Cybersecurity](#)
- [Labor & Employment](#)
- [U.S. Government Relations](#)



Member-Only Best Practice Training Programs



MEMBER RESOURCE CENTER

Business of Law

Policies

- AI Policy EXAMPLE [Word]
- Clean Desk Policy EXAMPLE [Word]
- Environmental Responsibility Policy EXAMPLE [Word]
- Flexible Work Policy Template EXAMPLE [Word]
- Law Firm Compensation Models [Word]
- Return to Work Policy EXAMPLE [Word]
- Social Media Policy EXAMPLE [Word]
- Technology Stipend Policy EXAMPLE [Word]

Business Development & Marcom

Strategy Presentations

- Bridging Generational Gaps [PDF]
- Chambers/Legal 500 Submission Guide [PDF]
- Client Interview Kits [Word]
- Cross-Selling [PDF]
 - Attorney Internal to Firm Cross Sell Guide SCG Legal EXAMPLE [Word]
 - Attorney Internal to Firm Cross Sell Guide SCG Legal Template EXAMPLE [Word]
- LinkedIn Strategies v2024 [PDF]
- Personal Branding [PDF]
- Return on Investment (ROI) of In-Person Events [PDF]
- Strategy Session EXAMPLE [PPT]
- SWOT Analysis [PDF]

Strategic Initiatives

2025 Meeting Schedule

- Practice & Affinity Groups + Regions [PDF]

Artificial Intelligence (AI) Exchange Working Group

- AI Strategy Exchange 2.0 v2025 [web portal]
- AI Strategy Exchange 1.0 v2024 [web portal]

Diversity, Equity, and Inclusion

- Coming Soon

New Partner Institute (NPI)

- Class 2024-2025 [web portal]
- Class 2023-2024 [web portal]

2026 PRACTICE GROUP MEETING SCHEDULE

ALL MEETINGS VIRTUAL & ALL TIMES ET UNLESS OTHERWISE NOTED

CALENDAR INVITATIONS SENT VIA EMAIL TO PARTICIPANTS

ARBITRATION

Feb 9 | Oct 26 > 5 – 6 AM, 11 AM – NOON

BANKRUPTCY & INSOLVENCY

Jan 28 | Apr 9 | Jun 30 | Nov 19 > 11 AM – NOON

CORPORATE/MERGERS & ACQUISITIONS

Feb 4 | Apr 21 | Nov 17 > 11 AM – NOON

>> Click [HERE](#) for this Group's capabilities directory.*

CANNABIS

April 15 > 12 PM

CONSTRUCTION

TBD

DATA PROTECTION, PRIVACY & CYBERSECURITY

Feb 3 | May 12 | Oct 13 > 11 AM – NOON

>> Click [HERE](#) for this Group's capabilities directory.*

GOVERNMENT RELATIONS (U.S.)

Jan 13 | Apr 21 | Jun 2 | Oct 27 > 3 – 4 PM

>> Click [HERE](#) for this Group's capabilities directory.*

INTELLECTUAL PROPERTY

Feb 10 | May 19 | Oct 15 > 11 AM – NOON

LABOR & EMPLOYMENT

Oct 14 > 11 AM - NOON

>> Click [HERE](#) for this Group's capabilities directory.*

LITIGATION

Jan 21 | June 3 | Oct 21 > 10:30 – 11:30 AM

WHITE COLLAR

May 20 | Nov 5 > 11 AM – NOON

+ in-person at 2026 Midyear Meeting > March 26-27 | Melbourne (Australia)

+ in-person at 2026 Annual Meeting > Sept 17-18 | Washington, DC (US)

Interested in a Group? Have an idea for a Group?

Email CEO [Alina Gorokhovsky](#)

*If you/r firm is not included, please contact scgadmin@scglegal.com

2026 REGION MEETING SCHEDULE

ALL MEETINGS VIRTUAL & ALL TIMES ET UNLESS OTHERWISE NOTED
CALENDAR INVITATIONS SENT VIA EMAIL TO PARTICIPANTS

ASIA & PACIFIC RIM > 11 PM – MIDNIGHT

Jan 21 | May 19 | Oct 28

>> Click [HERE](#) for Market Entry App for Australia | Hall & Wilcox (Melbourne)

>> Click [HERE](#) for Doing Business in Vietnam | Dilinh Legal

CANADA > 11 AM – NOON

Feb 12 | Apr 16 | Sep 10 | Nov 12

June in Person Meeting

>> Click [HERE](#) for this Region's SCG Doing Business in... Guide.

EUROPE > 9 – 10 AM

Jan 21 | Apr 14 | Jun 18 | Nov 5

+ in-person at 2026 Midyear Meeting > March 26-27 | Melbourne (Australia)

+ in-person at 2026 Annual Meeting > Sept 17-18 | Washington, DC (US)

LATIN AMERICA & CARIBBEAN > NOON – 1 PM

Jan 22 | Apr 14 | Jun 18 | Nov 4

>> Click [HERE](#) for this Region's SCG Doing Business in...Guide.*

>> Click [HERE](#) for Navigating Conflict in Guatemala | Carrillo & Asociados

>> Click [HERE](#) for Doing Business in Peru | Philippi Prietocarrizosa Ferrero DU & Uría

UNITED STATES > 2 – 3 PM

Jan 14 | Jun 3 | Nov 4

Interested in a Group? Have an idea for a Group?

Email CEO [Alina Gorokhovsky](#)

*If you/r firm is not included, please contact scgadmin@scglegal.com



SCGLEGAL[®]
A WORLDWIDE NETWORK OF LEADING LAW FIRMS

Women in Law Mentorship Program

Together, we are shaping a future
where women lawyers are empowered
to lead, excel, and inspire.

scglegal.com

MENTORS & MENTEEES

Mentee Candidates:
Junior Partner, Of Counsel, Senior Associate



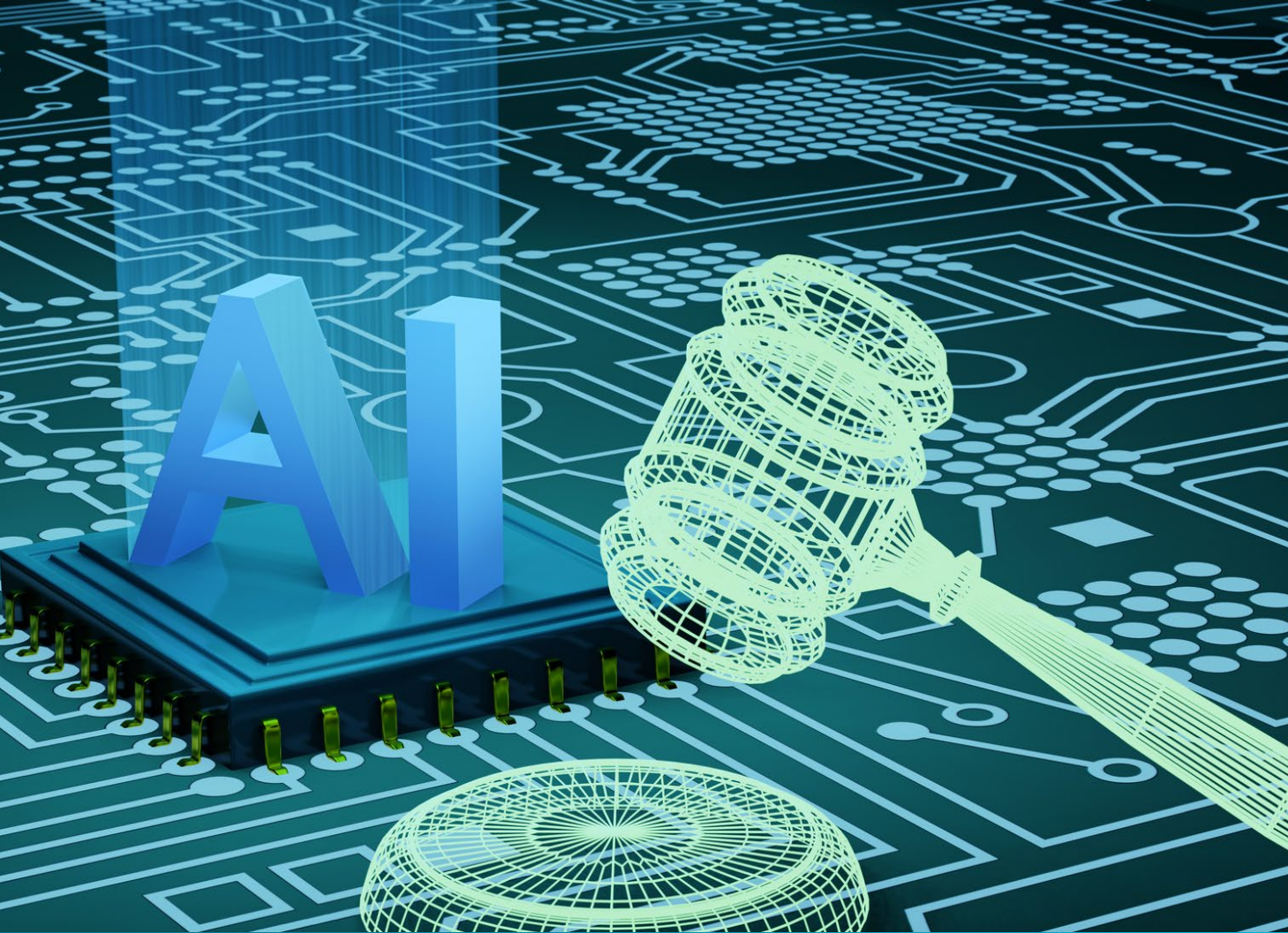
Key Benefits

Knowledge transfer,
network expansion,
career guidance



Cross-Firm Connections

Build relationships
across member firms



SCGLEGAL[®]

A WORLDWIDE NETWORK OF LEADING LAW FIRMS

Building on the success of AI Strategy Exchange 2.0, SCG proudly introduces AI Strategy Exchange 3.0. This initiative is designed to equip member law firms with innovative AI technologies and resources, enabling them to drive productivity, enhance efficiency, optimize operations, and gain a competitive edge.

This program will act as a compass, guiding our members in shaping the future direction of their firms.

In partnership with LegalTech Hub (LTH), AI Strategy Exchange 3.0 will provide members with access to cutting-edge industry resources, collaborative engagements with leading vendors and consultants, and insightful expertise to drive meaningful innovation across firm operations and practice areas.

AI Strategy Exchange 3.0

This program is a no-cost, value-add benefit exclusively available to SCG Legal Members

AI Legal Assistant

AI Legal Assistant

Spellbook, Sylo, Spellbook, EYELEVEL, paxton, 2ND, UNCOVER, CALLIDUS, scissers, ontra, amto, Harvey, ContractKen, Copilot, sarvam, casemark, AUTOMATISE, JUS MUNDI, Decover, AtlasAI, Clio, ContractPod, Trellis AI, deliberately ai, bagman.ai, eve, LEGORA, Q esummy, LEGALFLY, CASEY, FirstRead, GC AI, ivy, Syntheia, MATEY AI, DISCO, nd MAX, LexisNexis, LegalOn, Vecflow, emmi, JudyAI, midpage, servient, Lexis+ AI, Protégé, RoboLex, newcode.ai, Juri Associate, NEXLAW.AI, Ruli

Process Improvement

Process Improvement

autologix, docato, Truth Systems, springbok, 273, Neota, Klappper, bagman.ai, vals.ai, nd MAX, servicenow, SANDBOX.LAW, amto, airia, Lowdify, ControlStack, LEGA, Betty Blocks, Jylo, LUMINOS.AI, root signals, BRYTER, RASA, RoboLex, simplexio

Consultants

Consultants

273, springbok, LEGA, erbs, TrueLaw, simplexio

Contracts

Contracts

Spellbook, Standd, flank, AutoLex, Hebbia, Harvey, Ironclad, ontra, Aracor, KIRA, Icertis, KNOWABLE, ContractPod, LEGORA, MAIGON, BRYTER, imprima, LEGALMATCH, OPUS2, AI Law, Scribe, JudyAI, Clearbrief, alexi, bench iq, JuristAI, EvenUp, trellis, Discover, No Code Strings

Litigation Management

Litigation Management

AUTOMATISE, Sylo, Parrot, prevail, casemark, Briefpoint, Uncover, verbit, trellis, Doctrine, DODONAI, EYELEVEL, LEGALMATCH, OPUS2, AI Law, Scribe, JudyAI, Clearbrief, alexi, bench iq, JuristAI, EvenUp, trellis, Discover, No Code Strings

Legal Research

Legal Research

Vindex AI, Lexata, Wolters Kluwer, moonlit, Lexis+ AI, paxton, QURA, responsiv, LegalMike, CompetitionAI, midpage, plural, DOCKET ALARM, blueJ, bench iq, Data, Sigsaw, StructureFlow, BRYTER, ozmosys, Catylex, centari, Jurimesh, M-Files, Sinequa, INTRAFIND, Pitchly, EISPORIA, SingleDraft, Fledger, LexisNexis, CO ClauseBully, Sinequa, INTRAFIND, Pitchly, EISPORIA, SingleDraft, Fledger

Documents

Documents

Spellbook, DraftWise, MACRO, paxton, amto, Manage, DocDraft, SingleDraft, netdocuments, nd MAX, BRYTER, LITARA, Create, DraftPro, ClauseBuilder AI, Law Firm Operations, QorusDocs, ELLC, ayoro, rocket, laurel, ControlStack, Filevine, INTAPP, oDDR, PointOne, INTAPP, billables.ai, KAITONGO, antidote, Lowhive, Querious, mycase, Pitchly, 273, Ajax, WALTER, LEAP, 2ooke.ai, emmi

Transaction Mgt

Transaction Mgt

UTERA Kira, SimplyAgree, Datasite, BREVIA, Luminance, DealClosers, Stranda, MARVERI, Robin AI, Tower, LexisNexis, Parsi, M Jurimesh

Legal Ops

Legal Ops

docato, Poppy, brightflag, Coheso, tonkean, responsiv, LexisNexis, Lopti, Ruli, Wordsmith, IP Mgt, patsnap, NLPatent, TANGIBLY, PatentPal, Amplified, CarefulAI, DeepIP, Edge, &AI

Legal Point Solutions

Legal Point Solutions

Sigsaw, BeringLab, MANTLE, SmartEq, Juristic, Atticus, Synthera, SlataDoc, BRYTER, Corpora, Dimension A, StructureFlow, Compliance, Josef, blee, abstract, BRYTER, LAYERUP, Norm AI, People, Lawline

AI STRATEGY EXCHANGE WORKING GROUP

Artificial Intelligence (AI) Strategy Exchange 3.0

In line with the network's ongoing commitment to embracing innovation and remaining at the forefront of advancements in the legal industry, we are excited to announce the launch of the second cohort of our proprietary [Artificial Intelligence \(AI\) Strategy Exchange Working Group](#) in partnership with [Legaltech Hub \(LTH\)](#), the leading insights and analysis platform for legal technology.

- Click [HERE](#) for the 2025 press release.
- Click [HERE](#) for the 2025 program brochure.
- Click [HERE](#) for relevant Resources.
- Looking for AI Strategy Exchange 1.0 (2024) and 2.0 (2025) information? Click [HERE](#).

2026 MEETING SCHEDULE

Meeting invitations — including Zoom details — should have been received by all who participated in the 2024 and 2025 cohorts as well as anyone who has since been suggested by their firm Voting Representative and/or expressed interest. **Questions?** Please email Administrative Assistant Margaux Army at marmy@scglegal.com.

KICKOFF

February 26 > 11 AM – Noon ET

MEETING #2:

April 29 > 11 AM – Noon ET

MEETING #3

September 9 > 11 AM – Noon ET

THE OLD THINKING:
BUY HOURS



THE NEW REALITY:
BUY OUTCOMES



*Clients are buying outcomes,
not hours.*

SCGLEGAL[®]
A WORLDWIDE NETWORK OF LEADING LAW FIRMS
WASHINGTON, DC

NETWORKING @ INDUSTRY EVENTS



ILTACON

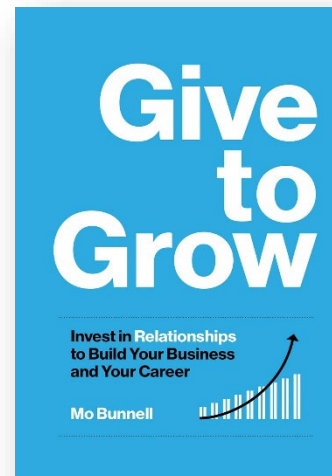
**MARKETING
PARTNER**

FORUM



**THOMSON
REUTERS[®]**





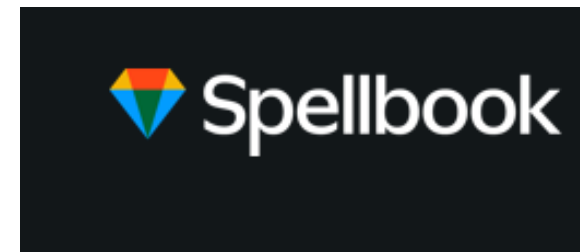
INDUSTRY PARTNERSHIPS

Briefly

Modern AI tools that enable
law firms to win more business

LEGORA

LSSOSM
LEGAL SALES AND SERVICE ORGANIZATION INC.



TRANSPERFECT
LEGAL

Thursday, February 20

12:00 pm – 1:30 pm
Concorde Conference Room
LUNCH | INFORMAL NETWORKING WITH SCG LEGAL'S BOARD CHAIR AND CEO
If you are arriving early, please join us for this pre-event networking lunch.

1:30 pm – 2:00 pm
Madeleine Conference Room
INTRODUCTIONS and MEETING OVERVIEW
• Celeste Bruce, Rifkin Weiner Livingston (US: Maryland) | Chair, SCG Legal
• Alina Gorokhovskiy, CEO, SCG Legal

2:00 pm – 3:30 pm
Madeleine Conference Room
THE EVOLVING LEGAL LANDSCAPE: KEY TRENDS SHAPING THE INDUSTRY
As the legal industry continues to evolve, law firms face increasing pressure to adapt to a rapidly changing environment. From shifting market dynamics and technological innovations to changing client expectations and the evolving needs of talent, firms must rethink their strategies to stay competitive. This session will provide the latest on the legal market, examining key trends reshaping the future of legal services and exploring how law firms can adapt their strategies to stay competitive and relevant in an increasingly dynamic environment.

3:30 pm – 3:45 pm
Madeleine Conference Room
BREAK | NETWORKING

3:45 pm – 5:00 pm
Madeleine Conference Room
COLLECTIVE WISDOM: A ROUND-ROBIN DISCUSSION
A group discussion and collective response to *The Evolving Legal Landscape: Key Trends Shaping the Industry* presentation, allowing participants to reflect on key takeaways and offer additional insights into what's impacting the legal industry as well as individual firms. The goal is to collaborate on creative solutions and new strategies that address common challenges within firms and across the SCG community. By leveraging the combined experience and expertise of the group, the outcomes of this session will help firm's drive growth, enhance client service, and strengthen internal operations and processes.

5:00 pm
ADJOURN

6:30 pm – 9:30 pm
COCKTAIL RECEPTION/DINNER
@Joe's Seafood, Prime Steak & Stone Crab

Friday, February 21

7:45 am – 9:30 am
Concorde Conference Room
BREAKFAST | NETWORKING

9:30 am – 11:00 am
Madeleine Conference Room
LATEST INNOVATIONS IN TECHNOLOGY: WHAT LAW FIRM LEADERS NEED TO KNOW
In today's highly competitive legal landscape, where law firms face intense pressure not only to attract clients but also to secure market share and top talent, strategic investments in technology are more critical than ever. For independent law firms, making informed decisions about which platforms to adopt, understanding the return on investment for any improvements, and effectively implementing artificial intelligence (AI) tools is key to staying competitive. This panel will offer a forward-looking discussion on the leading technologies reshaping the industry and how to assess and implement them. There will be a special focus on the transformative role of Generative AI (GenAI) in law firms.

11:00 am – 11:15 am
BREAK | NETWORKING

11:15 am – 12:30 pm
Madeleine Conference Room
BALANCING GROWTH, PROFITABILITY, AND CULTURE: BUILDING A HIGH-PERFORMANCE LAW FIRM
Fostering a cohesive, high-performance culture while driving growth and meeting goals for greater profitability can present significant challenges for law firm leaders. This session will explore how law firm leaders can navigate this delicate balance through proven strategies for aligning culture with business objectives, tackling difficult conversations around performance improvements, and managing compensation systems to incentivize the right behaviors. Additionally, panelists will address the role of profitability modeling and analysis in shaping performance expectations and how law firms can develop and retain their leading talent.

12:30 pm – 2:30 pm
Concorde Conference Room
LUNCH | NAVIGATING CHANGE: FORECASTING THE TRUMP ADMINISTRATION'S IMPACT ON THE GLOBAL LEGAL LANDSCAPE | STEVE TUGEND, KEGLER BROWN

2:30 pm – 4:00 pm
Madeleine Conference Room
COLLABORATIVE INSIGHTS: A ROUNDTABLE OF IDEAS
This session, facilitated by faculty from Zeughauser Group, is designed to foster open dialogue and the exchange of innovative ideas regarding topics chosen by the group (financial and strategic planning, growth and merger trends, best practices to drive profitability, building and maintaining a strong firm culture, profitable lateral growth). In a structured round-robin format, participants will have the opportunity to briefly share insights, challenges, and best practices from their respective leadership roles. The goal is to generate collaborative discussions, spark creative solutions, and uncover new strategies for addressing common challenges within our firms. By leveraging the collective experience and expertise of the group, the session will provide valuable takeaways that can be applied across firms to drive growth, enhance client service, and strengthen internal processes.

4:00 pm – 4:30 pm
KEY TAKEAWAYS & CLOSING INSIGHTS

4:30 pm
ADJOURN

5:00 pm
COCKTAILS/DINNER FOR PARTICIPANTS WHO ARE STAYING IN TOWN

MEETING FACILITATORS

Mary K Young, Zeughauser Group: With more than 18 years of experience at Zeughauser Group, Mary K has been instrumental in helping law firm clients develop strategic plans, create impactful growth initiatives, launch branding campaigns, and build high-performing operational teams. Known for her insightful analysis and ability to produce tangible results, Mary K excels in driving success through innovation and collaboration. Prior to joining Zeughauser Group, she served as Chief Marketing Officer at a Global 50 law firm, where she led marketing and business development efforts on a global scale. Mary K's deep expertise in law firm strategy and operations has made her a trusted advisor to firms seeking sustainable growth and competitive advantage.

Paul S. Pearlman, Zeughauser Group: A highly regarded industry leader, Paul led New York-based Kramer Levin ~~Naftali~~ & Frankel to two decades of impressive financial growth. Drawing on his extensive experience, Paul now applies his deep understanding of building and maintaining successful, creative, and collaborative partnerships to his consulting practice. He specializes in advising law firms on a range of management and governance issues, including strengthening financial performance, strategic planning, compensation systems, practice management, talent development, and high-value lateral partner recruitment. Known for his ability to drive growth and innovation, Paul's expertise helps law firms enhance operational effectiveness and achieve long-term strategic objectives.

Nikki Shaver, CEO, Legaltech Hub: With 20 years in law, Nikki has practiced at major firms in Australia, led knowledge and innovation teams at Stikeman Elliott and Paul Hastings, and advised on Legaltech procurement. In 2019, frustrated by the lack of searchable Legaltech resources, she saw a need for better tracking of solutions—an insight that inspired the founding of Legaltech Hub.

2025 In-Person Meetings: Save the Details
May 15 – 16: Midyear Meeting in Barcelona (Spain)
September 18 – 19: Annual Meeting in Austin, TX (U.S.)



September 16, 2026
Wiley Office
2050 M Street NW
Washington, DC 20036
AGENDA

SCG LEGAL MARKETING & BUSINESS DEVELOPMENT LEADERS (CMOS) ROUNDTABLE

The SCG Legal CMOs Roundtable will be held on September 16, 2026, the day before the opening session SCG Legal's Annual Meeting. Participants are encouraged to attend both the Roundtable and the Ann Meeting. To support participation, SCG Legal will waive registration fees for CMOs attending either both events. Member firms will be responsible only for travel and hotel expenses in Washington, DC; there is no additional cost for either program.

This interactive roundtable brings together CMOs from member firms to exchange ideas, discuss emerging trends, and share best practices in marketing, client development, leadership, and firm growth. The program will provide opportunities for peer learning, collaborative problem-solving, and networking with colleagues from across the SCG Legal network. In addition to the CMO Roundtable, participants will join COOs for a joint session focused on law firm growth strategies, crisis management, and cross-functional leadership approaches that strengthen firm performance. *CMOs are also encouraged to participate in the full Annual Meeting to connect with firm leaders and engage in broader discussions on issues shaping the legal profession.*

TUESDAY, SEPTEMBER 15

6:45 pm
Nationals Baseball
Park

BASEBALL GAME

Washington Nationals vs. Philadelphia Phillies

Join us for America's favorite pastime—a baseball game at beautiful Nationals Park! We have reserved a dedicated area in the PNC Diamond Club exclusively for our members, providing a wonderful opportunity to enjoy the game, cocktails, and dinner while networking and connecting with fellow members.

WEDNESDAY, SEPTEMBER 16

10:00 am – 10:15 am

WELCOME & OPENING REMARKS

10:15 am – 10:45 am

THE EVOLVING LEGAL LANDSCAPE: KEY TRENDS SHAPING THE INDUSTRY

As the legal industry continues to evolve, law firms face increasing pressure to adapt to a rapidly changing environment. From shifting market dynamics and technological innovations, to changing client expectations and the evolving needs of talent, firms must rethink their strategies to stay competitive. This session will provide the latest on the legal market, examining key trends reshaping the future of legal services and exploring how law firms can adapt their strategies to stay competitive and relevant in an increasingly dynamic environment.



September 16, 2026
Wiley Office
2050 M Street NW
Washington, DC 20036
AGENDA

10:45 am – 11:45 am

EXECUTIVE WISDOM: A ROUNDTABLE DISCUSSION WITH CMOs and COOs

Session Facilitators

- Doug Gold, Mitchell Silberberg & Knupp (California: Los Angeles)
- Michael Orce, Robinson+Cole (Massachusetts)
- Mariee Walton, Poyner Spruill (North Carolina)

This facilitated roundtable discussion will provide participants with an opportunity to reflect on the insights and themes presented during *The Evolving Legal Landscape: Key Trends Shaping the Industry*. Through an interactive exchange of ideas, attendees will share perspectives on the future of the legal profession, law firm operations, and the future direction of their firms. The discussion is designed to foster collaboration among firm leaders, encourage the exchange of best practices, and identify innovative strategies for addressing shared challenges across firms and throughout the SCG Legal community. By leveraging the collective experience and expertise of the group, participants will explore practical approaches to driving growth, enhancing client service, strengthening firm operations, and positioning their organizations for long-term success. Facilitated discussion topics:

- **Growth Strategies:** Opportunities and challenges associated with firm growth through lateral hiring, mergers, acquisitions, and geographic expansion.
- **Succession Planning & Leadership Development:** Preparing the next generation of firm leaders and ensuring leadership continuity.
- **Crisis Management & Business Continuity:** Responding to cyber incidents, natural disasters, pandemics, reputational issues, attorney departures, and other unexpected disruptions.

11:45 am – 1:30 pm

WORKING LUNCH | EXECUTIVE WISDOM: A ROUNDTABLE DISCUSSION WITH CMOs ONLY

Session Facilitators

- Diana Courson, Wiley (US: Washington, DC)
- Tricia Lilley, Barnes & Thornburg (US: Indiana)
- Liz Sobe, Robinson+Cole (US: Massachusetts)

The Executive Wisdom Roundtable Discussions are intended to be highly interactive and flexible. While these topics will help guide the conversation, participants are encouraged to raise additional issues as they emerge throughout the discussion.



September 16, 2026
Wiley Office
2050 M Street NW
Washington, DC 20036
AGENDA

Facilitated discussion topics:

- **The CMO as Change Agent:** Positioning the CMO as a change agent driving influence, leadership, and transformation—is it time for a new job description? This discussion explores how firms are redefining the role through business development strategy, lateral partner integration, talent management, and technology to lead organizational change and drive sustainable growth.
 - Facilitator: Tricia Lilley, Barnes & Thornburg (US: Indiana)
- **The Next Phase of Client Development & Strategy:** Exploring how law firms drive growth through client value, service excellence, and meaningful client feedback. This discussion will examine how firms are strengthening key relationships, aligning client strategies across practices, and turning insights into measurable business development opportunities and long-term growth.
 - Facilitator: Liz Sobe, Robinson+Cole (US: Massachusetts)
- **Working Together Across the Globe:** Leveraging SCG Legal's network of 125 member firms across 65 countries to create business development opportunities. Explore how we can collaborate more effectively, what we can achieve together, and how SCG Legal can support your firm's growth and success.
 - Facilitator: Diana Courson, Wiley (US: Washington, DC)

1:30 pm – 2:00 pm

KEY TAKEAWAYS & CLOSING INSIGHTS

3:00 pm – 4:00 pm

U.S. CAPITOL TOUR

Visit the United States Capitol, a historic landmark that has stood at the center of the nation's legislative process for more than two centuries. During your visit, you'll explore its grand architectural spaces, learn about its rich history, and gain insight into how laws are made in the United States. From the Rotunda to the National Statuary Hall, each stop offers a deeper understanding of the people and events that have shaped the country. If you have not yet registered and would like to join us, please contact Margaux Gray-Army (marmy@scglegal.com) for additional information.

6:00 pm

COCKTAILS AND DINNER @ RIS (2275 L St. NW)

Business Development Webinars

The Revenue You're Leaving on the Table: Turning Key Clients into Strategic Accounts

October 22 @ 11:00 AM - 12:00 PM EST

This webinar is a complimentary value-added program for SCG Legal members. If the date/time does not work for your schedule, please register anyway so you can receive the recording.

Many law firms are sitting on untapped growth opportunities within their existing client relationships. Your most important clients can provide a steady stream of opportunities to expand services, strengthen relationships, introduce next-generation talent, and create greater value for their businesses. Yet too often, firms focus on individual matters rather than taking a strategic, client-centered approach that drives long-term growth.

Join us for this practical webinar as we explore how to identify and develop Strategic Accounts, deepen client relationships, and align your firm's capabilities with your clients' business objectives and legal needs. Participants will learn how to uncover new opportunities for revenue growth while becoming more indispensable advisors to their clients.

Smart Growth Strategies for Tomorrow's Law Firms

November 18 @ 11:00 AM - 12:00 PM EST

This webinar is a complimentary value-added program for SCG Legal members. If the date/time does not work for your schedule, please register anyway so you can receive the recording.

Law firms are facing unprecedented changes. Escalating costs, increasing client expectations, talent mobility, and rapid advances in artificial intelligence are transforming how legal services are delivered and how law firms compete. The firms that thrive will be those that align high-value legal services with deliberate business growth strategies, strong leadership, thoughtful technology investments, magnetic workplace cultures, and effective succession planning.

This presentation is designed for future-focused law firm partners and executives, practice group leaders, and next-generation talent in firms of all sizes who want to build stronger, more sustainable law firms. This presentation will explore the Smart Growth Strategies that will help you navigate the disruption that is transforming the business of law as you position your firm for long-term financial and professional success.

- Efficiency: Process Improvement, Project Management and the P+Ecosystem
- Well-Being: A six-part webinar series featuring How to Foster and Keep a Sense of Control, A Stress- Resilience Workspace, Virtual Team Building Activities, Habits for Continued Professional and Personal Growth, Healthy Work Engagement vs. Burning Out and The Six Human Needs and Seven Habits of Highly Effective People
- Diversity, Equity and Inclusion: A three-part webinar series featuring Bias-Reducing and Diversity-Promoting Decision-Making for Legal Professionals, Identifying and Confronting Subtle Forms of Bias in the Law Firm and a Fireside Chat with Law Firm Diversity Professionals
- Strategic Communication as Law Firms Re-Open Their Doors
- Developing Business in a Virtual Landscape
- Post-pandemic Future: How to Orient Your Business for the Changes We've Seen and the Changes to Come
- Drive Client Loyalty and Build Business by Understanding the Voice of Your Client

203 Alumni Organizing Annual Alumni Meeting

Executive Coaching Sessions

Group sessions + online training modules (video tutorials). Run-time average of six-minutes or less ensures minimal impact on billable time. Immediately actionable with clear step-by-step instructions on how to apply each strategy.

- **How to Expand Your Professional Network Virtually**
- **Prospecting for New Clients in a Virtual Environment**
- **How to Succeed in a Virtual Pitch**
- **How to Differentiate from the Competition**
- **How to Enhance Your Professional Reputation with Social Media and Thought Leadership**



2026: 2 Classes (47 Participants)

NEW PARTNERS INSTITUTE (NPI)

MODULE ONE – FEB 19

VIRTUAL WORKSHOP – TWO HOUR PROGRAM

INTRODUCTIONS & BUILDING A STRONG FOUNDATION

PROGRAM WELCOME. SALES V. MARKETING, & EFFECTIVE INTRODUCTIONS

PURPOSE: To discover the roadmap to follow and the specific steps to achieve business development goals. To develop, practice and refine a unique "elevator speech" and facilitate connections among the participants. ~~Participants are introduced to each other as well as the marketing cycle~~ and sales process. This module includes addressing the reluctance some lawyers have in "selling" by defining exactly what it is in the context of selling professional services. By laying out the specific phases of the sales process and detailing what activities should be undertaken at each juncture from planning to retaining and growing clients, lawyers have a clear roadmap to follow and an in-depth understanding of what can and should be done to advance to the next step.

Creating and delivering an elevator speech is essential for effective relationship development and networking. First impressions can make or break a relationship. In this program, participants learn what it is (a 10 second "tagline" that is succinct and memorable, focused on benefits and delivered effortlessly) and then practice and revise it as appropriate to the situation.

The FIRM Guidance "Elevator Speech Worksheet" will be provided for the small amount of advance work required in this kickoff.

MODULE TWO – MAR 17 AND APR 16

TWO VIRTUAL WORKSHOPS – ONE HOUR EACH

LEADERSHIP

PURPOSE: To develop leadership skills, identify and leverage individual style, and build high-performing teams.

AGENDA FOR THIS MODULE:

These workshops are designed to help you develop your personal leadership, team leadership, and project management skills specifically in the legal context. Participants will also develop a personal leadership plan to put their learnings into action and transform as a leader. In this module, you will:

- Identify your personal leadership style and the emotional intelligence components that support effective leadership.
- Understand how legal training impacts emotional intelligence and leadership.
- Understand the components necessary to build and lead an effective high-functioning team.
- Learn how to incorporate personal leadership and team leadership to successfully manage a process improvement project.
- Identify opportunities for the development of personal leadership, team leadership, and/or project management skills and develop a plan to expand those skills.
- Learn how to incorporate leadership skills to matter management.
- Draft actionable steps to expand leadership, team and project skills.

MODULE THREE – MAY 13 AND JUN 17

TWO VIRTUAL WORKSHOPS – ONE HOUR EACH

PRACTICE MANAGEMENT, DESIGN THINKING, AI & PROCESS IMPROVEMENT

PURPOSE: To learn key process improvement and project management tools, understand how Design Thinking and AI can enhance legal practice, and create efficiency and client value.

AGENDA FOR THIS MODULE:

Process improvement, project management, AI and Design Thinking are being used by the legal profession to produce efficiency, predictability, excellence in work product and service delivery, while enhancing employee and client experience and improving the chances of successful outcomes. No trade-offs are needed by either the firm or the client when employing these approaches and resources, because everyone wins.

The program includes a brief introduction to key process improvement terms and methodologies, an explanation of project management, and how AI, PI and PM work together. In this module, you will:

- Learn about process improvement, AI tools, project management, and how they work together.
- Understand what Design Thinking is and how it is used in the legal industry.
- Find out how to get started on a PI/PM/DT program.
- Practice using PI, PM, and DT for competitive advantages: case studies of what others in the legal profession are doing.
- Learn about practical AI tools for research, drafting, and client engagement.

MODULE FOUR – JUL 16 AND SEP 9

TWO VIRTUAL WORKSHOPS – ONE HOUR EACH

PLANNING FOR SUCCESS

PURPOSE: To build personal business plans and strengthen networking, collaboration, and relationship development skills.

AGENDA FOR THIS MODULE:

- Set SMART goals.
- Develop your individual business plan that leverages your strengths.
- Focus on actionable plans to build long-term business development habits and solidify your relationships.
- Develop a long-term business development strategy and execute your short-term business development plan.
- Building referral sources and clients for life.
- Leverage firm and SCG Legal referral opportunities.
- Share best practices for cross-selling and collaboration.
- Guided exercise to develop individual goals aligned with practice strengths.

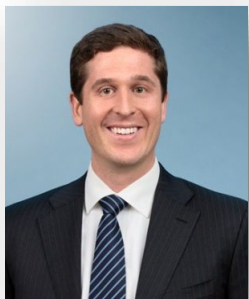


FIRM GUIDANCE/MACDONAGH CONSULTING
Catherine Alman MacDonagh, JD is an award-winning lawyer entrepreneur, consultant, professor, author, and speaker. With FIRM Guidance, she offers planning, organizational development, marketing, and business development consulting services with a particular focus on the legal profession.

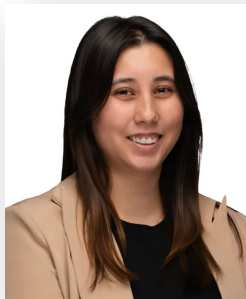


THE LEGAL LEAN SIGMA INSTITUTE
LLSI is the first and only organization that offers a full range of consulting services and certifications in process improvement and project management as well as certificate programs and workshops for legal departments and law firms / offices.

NPI 2026 CLASS



Adam Pabarcus
Larkin Hoffman
US: Minnesota



Alana Mitchem
Erickson | Sederstrom
US: Nebraska



Alexandria Russell
Rath, Young, and
Pignatelli
US: New Hampshire



Anastasiia Klian
GOLAW
Ukraine



Anna Okła-Woźniak
Domański
Zakrzewski Palinka
Poland



Andrew Tague
Goodell, Stratton,
Edmonds & Palmer
US: Kansas



Angela Beierbach
Field Law
Canada: Alberta



Austin Jones
McGinnis Lochridge
US: Texas



Austin Provost
Robinson+Cole
US: Massachusetts

NPI 2026 CLASS



Bir Bahadur Singh
Sachar
JSA
India



Brittney Lehtinen
Kaempfer Crowell
US: Nevada



Caitlin Cobb
Capell & Howard
US: Alabama



Clara Fazio
Barreiro
Argentina



Colin Cloherty
Wiley
US: Washington, DC



Denisse Ortiz-Torres
O'Neill & Borges
Puerto Rico



Dylan Castellino
Poyner Spruill
US: North Carolina



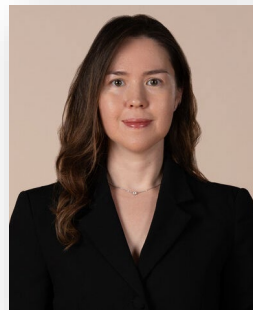
Emil Brockstedt
Marburger
Skau Reipurth
Denmark



Emile Khoury
Boutin Jones
US: Sacramento, CA



Emma Plaxton
Mills & Reeve
UK



Fulya Kurar
Moroğlu Arseven
Turkey



Gabriel d'Amécourt
Veil Jourde
France



Giselle Pérez Reyes
Guzmán Ariza
Dominican Republic



Hunter Schoen
Adams & Reese
US: Louisiana



Jamie Riley
Parsons Behle &
Latimer
US: Idaho



Jay Cho
Patterson Belknap
Webb & Tyler
US: New York, NY



Jean-Rodolphe
Fiechter
Kellerhals Carrard
Switzerland



Joel Wee
CNPLaw
Singapore

NPI 2026 CLASS



Jordi Abras Carbó
AGM Abogados
Spain



Josafat Izaguirre
ALTA Melara &
Asociados
Honduras



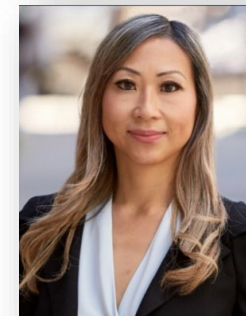
Kari K. Noborikawa
Starn O'Toole
Marcus & Fisher
US: Hawaii



Kartik Jain
JSA
India



Katherine Binsted
Wynn Williams
New Zealand



Leslie Wong
Clark Wilson
Canada: British
Columbia



Lia Boritz
WeirFoulds
Canada: Ontario



Magdalena Ozarowski
Ausley McMullen
US: Florida



Miguel Ángel Soto
Philippi Prietocarrizosa
Ferrero DU & Uría
Peru

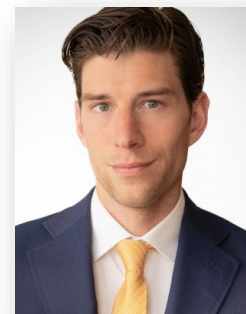
NPI 2026 CLASS



Nick Bratis
L Papaphilippou & Co
Cyprus



Oleri Galope
Travers Thorp Alberga
Cayman Islands



Peter Dalmay
Jonsson & Hall
Iceland



Peter Lennartz
RosholmDell
Sweden



Robert Couch
Parsons Behle &
Latimer
US: Idaho



Ruari O'Sullivan
Berman Fink Van Horn
US: Georgia

NPI 2026 CLASS



Sheniqua Hodge
Webster
Anguilla



Theresa Bowman
Mitchell Silberberg & Knupp
US: Los Angeles, CA



Sven-Erik Holm
GvW Graf von Westphalen
Germany



Yan Feldman
Amit, Pollak, Matalon & Co.
Israel

SCGLEGAL®

A WORLDWIDE NETWORK OF LEADING LAW FIRMS

Weekly Global Roundup

Vol 2025 Issue Feb 17

The Members of SCG Legal's global community are consistently offering critical opportunities – **thought leadership, industry guides, in-person events, podcasts, webinars, and more** – with direct impact on attorney, firm, and client success. If your firm would like to contribute to this weekly e-communication, please send details to sharealerts@scglegal.com.

IN THE SPOTLIGHT

SCG Legal 2025 Midyear Meeting | May 15-16 | Barcelona, Spain

The legal landscape is shifting rapidly, influenced by technological advancements, geopolitical uncertainty, economic fluctuations, and evolving regulations. Navigating this ever-changing landscape requires more than just expertise—it demands collaboration, foresight, and strategic innovation.

This Midyear Meeting is designed to equip lawyers with the tools, insights, and connections needed to not only manage but lead through challenges and changes

WEBINARS to watch

THIS WEEK

February 18

- **The Tax Reform of Trapped Profits - User Guide** presented by Amit, Pollak, Matalon & Co. (Israel)
- **How To ... Assert Employer's Rights With Your EPLI Insurer** presented by Barnes & Thornburg (US: Indiana)

February 19

- **Artificial Intelligence and Ethics** presented by Mitchell Silberberg & Knupp (US: Los Angeles, CA)
- **Understanding the New Administrative False Claims Act** presented by Wiley (US: Washington, D.C.)

February 20

- **Immigration Insights: Weekly Fireside Chats** presented by Barnes & Thornburg (US: Indiana)
- **2025 Employment Law "Year in Review"** presented by Mitchell Silberberg & Knupp (US: Los Angeles, CA)
- **SBA's New Size Recertification Rules for Multiple-Award Contracts** presented by Wiley (US: Washington, D.C.)

Want to be Featured in the Next Newsletter?

Have news you want to share with the SCG community? Please send emails to sharealerts@scglegal.com.



News from the Network

In the Spotlight

AGM Abogados (Spain) announced the launch of their new ESG – Regulatory Compliance and Sustainability practice area. The new practice is led by **Marta Salvador Mateo**, lawyer in the Immigration area, and **Héctor Déniz Guedes**, Head of the Penal and Compliance area.

Fraser Trebilcock (US: Michigan) The firm's growth continues with Grand Rapids office relocation. New office address: 300 Ottawa NW Suite 810.

We're just three weeks away from SCG's 2025 Midyear Meeting in Barcelona on May 15–16! If you plan to attend but haven't registered yet, please click [HERE](#) to register.

We're also excited to announce that registration is now open for our **Annual Meeting**, taking place **September 18–19 in Austin, TX**. Click [HERE](#) for additional information. The first round of invitations for this event will go out to our network tomorrow.

Given the current global political, regulatory, economic, and legal uncertainties, we are hoping for strong member participation in Austin—ideally with two to three attorneys from each member firm. All SCG meetings are valuable opportunities to connect across firms and practice areas, and now more than ever, it's essential that we come together. These meetings not only highlight business development opportunities but also foster deeper collaboration to support clients in today's unprecedented environment.

In addition to Barcelona and Austin, we want to highlight two important **regional meetings** happening this year. We will have participation from all regional firms, ideally with two to three attendees per firm across different practice areas. If you or members of your firm are interested in attending and/or speaking, would like to promote your firm and practice, or have clients in Canada or the Asia-Pacific region and want to expand relationships there, please let me know.

Canada Regional Meeting – Calgary, June 19–20, 2025: This meeting will bring together our Canadian firms from across Alberta, British Columbia, Manitoba, New Brunswick, Northwest Territories, Nova Scotia, Nunavut, Ontario, Quebec, Saskatchewan, and Yukon. Discussions will include a wide range of topics—from M&A to litigation—and offer a strong focus on business development and cross-selling among firms.



Welcome to SCG's Global Spin Studio

Home to SCG Legal's attorney-to-attorney webcasts focusing on the issues and conversations that matter to you.



Disclaimer: SCG Legal's Global Spin and Global Spinette webcasts are for informational purposes only and do not constitute legal or professional advice. Listening does not create an attorney-client relationship. Always seek advice from an attorney licensed in the relevant jurisdiction.



Jul 9

Foreign Merger Deals in Today's Ukraine

In this very timely Global Spin, SCG Legal Member GOLAW (Ukraine) offers critical insights on why foreign deals need merger clearance...



Jun 24

Residency by Investment in Anguilla + Turks &...

In this special Caribbean edition of SCG Global Spin, our Member firms – Webster LP in Anguilla and Miller Simons O'Sullivan in Turks &...



Jun 13

Playing the Odds: An Update on Sports Betting i...

It's been seven years since the U.S. Supreme Court struck down a federal ban on sports betting, meaning each state gets to determine...

MEMBER-TO-MEMBER POD/WEBCAST



Thought Leadership

Showcase expertise to global legal community and clients.



Network Building

Forge connections with peers in specialized practice areas.



Production Support

Full production assistance included at no additional cost.

Meetings



2026 Locations

MIDYEAR MEETING in Melbourne: March 26 - 27

INTA Cocktail Reception in London: May 3

Team Canada in Winnipeg: June 11 - 12

ANNUAL MEETING in Washington, DC: September 17 - 18

IBA Cocktail Reception in Copenhagen: October 5

CMO & COO Roundtables September 15



2027 Locations

TEAM ASIA & PACIFIC RIM in New Delhi: February 25 – 26

Law Firm Leaders Roundtable: TBD

MIDYEAR MEETING in London: May 13 - 14

INTA Cocktail Reception in San Diego: May 9

Team Canada in Toronto: June

ANNUAL MEETING in New York: October 14 - 15

IBA in Singapore: November 14 – 19



2028 Locations

MIDYEAR MEETING in Milan: May 18 - 19

2027 MIDYEAR MEETING LONDON MAY 13 – 14



AN *d* AZ™ | LONDON
LIVERPOOL STREET

2027 ANNUAL MEETING NEW YORK OCTOBER 14 – 15



Client Referral Network



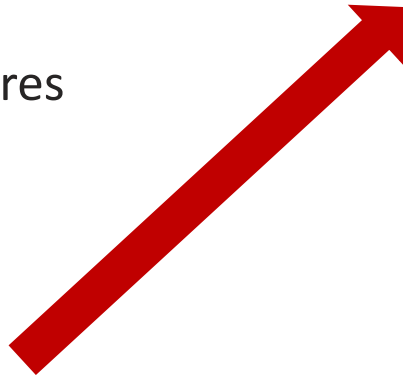
Identify Need

Determine when your client requires assistance in another jurisdiction



Find Resources

Visit www.scglegal.com/firms or contact CEO Alina Gorokhovsky



Make Connection

Connect with the listed representative in the needed jurisdiction



Track Referral

CC your voting rep and SCG's CEO on all referral communications

FRIDAY: BE HERE. BE SEEN. BE ENTERED TO WIN.

Our events are only as strong as your participation!

This year, every time we capture a photo of you attending a session, your name will be entered into our raffle. The more sessions you attend, the more chances you have to win!

Prizes include:

- **2 winners:** **\$2,000 toward airfare** to attend either our London or New York meeting
- **3 winners:** **4 Night complimentary hotel stay** at either the London or New York meeting
- **4 winners:** **Complimentary registration** for either the London or New York meeting

So show up, join the conversation, and get in the picture—the more sessions you attend, the better your chances of winning!



A SPECIAL 'THANK YOU' TO OUR VETTED SOLUTION PARTNERS

This Annual Meeting is sponsored in part by the following Network Partners:

TRANSPERFECT
LEGAL

Empowering legal professionals to leverage AI, analytics, and multi-language technology across eDiscovery, forensic consulting, due diligence, privacy, managed review, and staffing projects. **For more information, click [HERE](#).**



SPOKEN WITH AUTHORITY

Spoken with Authority elevates presence, expands influence, and honors authenticity for attorneys and legal professionals through group training and one-on-one coaching. **For more information, click [HERE](#).**

LEGORA

Legora is collaborative AI for exceptional lawyers. Legora helps you work more precisely, more efficiently, and with better judgment in complex, high-stakes legal work. **For more information, click [HERE](#).**



Ajax

Ajax is an AI timekeeping app that tracks attorneys' work automatically, drafts client-ready entries, and finds extra billables to push into your billing system. Of the hundreds of firms who have begun a pilot, 97% have gone on to subscribe, and no firm has ever decided to stop using Ajax. **For more information, click [HERE](#).**

SCGLEGAL[®]

2026 ANNUAL MEETING
September 17-18 | Washington, DC



KEYNOTE | THE HONORABLE LAURA DIBELLA

Chair of the U.S. Federal Maritime Commission (FMC)



THE NEW MATH OF LAW FIRM REVENUE AND PRACTICE MANAGEMENT: AI, BILLING BEST PRACTICES, PRICING STRATEGY, OUTSOURCING AND FEE INNOVATION

Moderator

- **Katherine Silverman > Berman Fink Van Horn (US: Georgia)**

Panelists

- **Martin Dell > RosholmDell (Sweden)**
- **Matt Felten > TransPerfect Legal (US: Pennsylvania)**
- **Jack Weinberger > Ajax (US: New York)**

THE LAW FIRM IS BECOMING A MORE COMPLEX OPERATING BUSINESS



DOING BUSINESS IN LATIN AMERICA

Moderator

- **Victor Salgado > Robinson+Cole (US: Massachusetts)**

Panelists

- **Guillermo de la Rosa > Torres, Plaz & Araujo (Venezuela)**
- **Nicolás Jaca Otaño > Barreiro (Argentina)**
- **Héctor Ramírez > Philippi Prietocarrizosa Ferrero DU & Uría (Colombia)**
- **Claudia Soares Garcia > Peixoto & Cury Advogados (Brazil)**

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SCGLEGAL[®]

2026 ANNUAL MEETING
September 17-18 | Washington, DC



STATE DYNAMICS: THE RIPPLE EFFECT ON FEDERAL POLICY & GLOBAL RELATIONS

Moderator

- **Robert Rieger > Adams & Reese (US: Louisiana)**

Panelists

- **Alexis Glascock > Fennemore (US: Arizona)**
- **Jonathan McCardle > Featherstonhaugh & McCardle (US: Albany, NY)**
- **Grace Pennerat > Poyner Spruill (US: North Carolina)**

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GRAND BALLROOM II (here) >

**M&A AND CAPITAL MARKETS OUTLOOK: TRENDS,
RISKS, AND OPPORTUNITIES**

GRAND BALLROOM I (next door) >

**LITIGATION IN FOCUS: NAVIGATING COMPLEX
DISPUTES**

BREAKOUT | M&A AND CAPITAL MARKETS OUTLOOK: TRENDS, RISKS, AND OPPORTUNITIES

Moderator

- **Mariano Batalla > ALTA Batalla (Costa Rica)**

Panelists

- **Peter Dalmay > Jonsson & Hall (Iceland)**
- **Michael Gieger > Barnes & Thornburg (US: Indiana)**
- **Ryan Hawley > Mills & Reeve (UK)**
- **Jean-Claude Lanza > Patterson Belknap Webb & Tyler (US: New York, NY)**

BRIBERY WORKS...COMPLIANCE DOESN'T— A CONVERSATION WE'RE NOT SUPPOSED TO HAVE

Moderator

- **Tatiana Sainati > Wiley (US: Washington, DC)**

Panelists

- **Thomas Amico > Veil Jourde (France)**
- **Vinita Mehra > Kegler, Brown, Hill + Ritter (US: Ohio)**
- **John Moran > McGuireWoods (US: Virginia)**

FIRESIDE CHAT | DEFENSE INDUSTRY: NAVIGATING GOVERNMENT CONTRACTS IN A HIGH-STAKES WORLD

Moderator

- Tom Pickthorn > Mills & Reeve (UK)

Panelists

- Jon Burd > Wiley (US: Washington, DC)
- Bartosz Marcinkowski > Domanski Zakrzewski Palinka (Poland)

Mills & Reeve – Defence Projects



PHASA-35



Molloy T-150



Watchkeeper



Protector RG1



Apache



Chinook



HMS Queen Elizabeth



Typhoon Eurofighter



Thermoteknix



Skyhammer



Viking



Hirtenberger



POLAND'S DEFENCE MODERNISATION

A STRONGER POLAND A SAFER EUROPE

PEOPLE
ALLIES
SECURITY
THE FUTURE

1. F-35A HUSARZ

Multi-role fighter



- USD 4.6 billion

32 units

2. MIECZNIK (ORP WICHER)

Multi-role frigate (Polish-built / UK design)



- EUR 4.3 billion

3 units

3. ORKA

Submarine programme



- EUR 4.0 billion

3 units

4. AH-64E APACHE GUARDIAN

Attack helicopter



- USD 12.0 billion

96 units

5. M1A2 SEPv3 ABRAMS

Main battle tank



- USD 4.8 billion

250 units

6. K2 BLACK PANTHER (K2PL)

Main battle tank

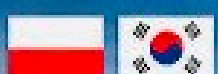


- USD 6.7 billion

1,000 units

7. HOMAR-K / CHUNMOO

Rocket artillery



- USD 10.0 billion

288 units

8. PATRIOT / WISŁA

Air and missile defence



- USD 4.8 billion

2 units

9. BORSUK

Infantry fighting vehicle

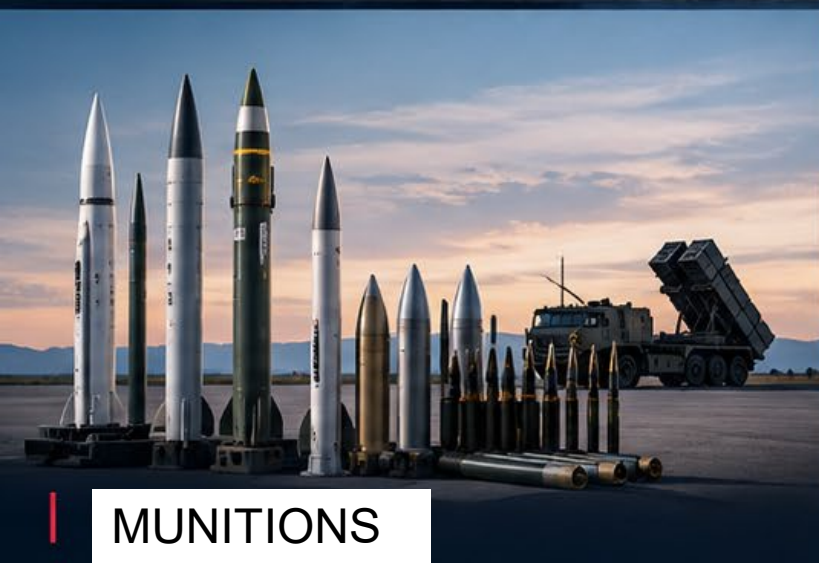


- EUR 4.8 billion

1,400 units

WHAT IS AMERICA BUILDING?

U.S. DEFENSE MODERNIZATION



**FIRESIDE CHAT | THE CHANGING ECONOMICS OF LAW:
WHAT AI MEANS FOR PRICING AND PROFITABILITY**

Kyle Poe
VP of Legal Innovation and
Strategy, Legora

Rewiring the Business Business of Law for The AI Age



Kyle Poe

VP, Legal Innovation & Strategy





01 Where We Are

AI is a force multiplier — the "AI dividend"

Three benefits at once (none of which show up on the invoice)

Higher quality

Deeper analysis. More thorough work product. Better outcomes.

Faster turnaround

Same output, less time. Faster cycles for the client.

Lower cost

Same output, less input. Where the cost reduction lives.

The squeeze every legal department is facing

Ever increasing demand; new expectation of cost savings

The business is
doing more

TRANSACTIONAL + REGULATORY



The other side has
AI too

DISPUTES + INVESTIGATIONS



The CEO
mandate

BUDGETARY PRESSURE



AI is accelerating every function: more deals, more products, faster cycles across the company. Legal exists to serve that activity, and the demand flows downhill.

Pro se litigants, consumer complaints, employee and HR claims: up in volume and in sophistication. AI-polished filings use the language that triggers escalation. You can no longer triage on tone.

CEOs are asking for AI-driven savings on total legal spend. Legal ops has fought this fight for two decades with hand tools; AI is the first instrument equal to the job.

The pressure GCs are facing is part of a larger AI push

CEO

Every CEO has AI as a top corporate priority — efficiency, effectiveness, fundamental rethink of how the organization operates.

GC

Legal is one of the largest cost centers in the company. CEOs are pressuring GCs to deliver AI-driven savings on total legal spend (inside + outside).

GCs have three strategic levers

Use AI internally
for existing work

For work already done in-house. The first place every legal department starts.

Insource work
previously sent to firms

Move work from outside to inside. Much easier said than done — but increasingly possible as AI raises in-house capacity.

Push outside counsel to
use AI and pass on savings

Make the firms that remain on the bench actually use AI, and pass the resulting savings back. The conversation a partner is most likely to feel directly.

How in-house counsel are pushing firms to use AI and pass on savings

Requests for Proposal (RFPs) Probe AI usage and outcomes. Have a real story with specifics; generic answers lose RFPs.	Outside Counsel Guidelines (OCGs) Itemize work the client won't pay hourly for.	AI transparency requirements Visibility into where, how, and with what impact AI is being used.	Credible threat of insourcing In-house team's AI capability raises pressure on every engagement.
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Who gets the dividend depends on three things

Fee arrangement

Hourly vs. fixed vs. hybrid — each allocates the dividend differently.

Bargaining power

Who has the leverage to push.

Competitive dynamics

What other firms are willing to do.



02 The Constraints that Lead to Output-Based Pricing

Going forward, legal work has two inputs

Human Time

Markup permitted. The historical engine of profitability.

AI Compute

Markup disfavored under current ethics rules. Pass-through costs are ok.

The **squeeze** that firms are facing

Rates rise linearly (and max out at ~10% per year)

Productivity rises exponentially.

The Result: Firm revenues shrink.

Year 1

~10% productivity, +10% rate. Roughly cancels.

Year 2

~30% productivity, +20% rate. The gap opens.

Year 3

~80% productivity, rate can't stretch. The model stops paying.

Because

- (1) hours will shrink faster than rates can rise, and
 - (2) margin (generally) cannot be charged on AI compute,
- firms will inevitably have to shift to output-based pricing.



03 Splitting the Dividend

Two extremes

Status quo: billable-hour arrangements favor clients

Hours decline as AI does the work. Rates can't rise fast enough to offset. The dividend flows to the client by inertia.

Lock in fixed fees at today's prices

Cost to deliver drops, price stays. The firm captures almost everything. Clients eventually figure this out.

Clients realize the status quo favors them.

The challenge is to design win-win arrangements that split the dividend and are compelling for clients to accept.

There are 3 ways to price legal services

Inputs

Examples: the classic “billable hour” + pass-through expenses

Outputs

Examples: matter-level fixed fees, charging per work product (e.g., a will)

Outcomes

Examples: contingency fees, success fees (which can be mandatory or discretionary)

Output-based pricing can be done at 3 levels

Task Level (aka Menu Pricing)

A price per motion, per document, per diligence pass.

Matter-level

One price for the whole matter.
This is the classic “fixed-fee arrangement”

Portfolio (i.e., Bundled)

Multiple matters bundled at one price.

Subscription-fee arrangements — i.e., all legal services within a given scope per month or year — are effectively a type of output-based pricing



04 The Billable Hour Is Not Dead *Yet*

What to do in the meantime and to prepare

Tips for what to do now

Pass Through AI Compute Costs to Clients

- Clients don't love technology charges.
- BUT they would rather pay for a bundle of AI compute credits (at cost) vs. pay for an hour of attorney time that has been marked up.
- Clients want transparency in how firms are using AI (both in general, but also to see where the firm is saving time).

Historical Benchmarking

- Figure out, on a matter and task level, what it used to cost (pre-AI) vs. what it is costing now.
- Use rough % time savings numbers to back into an invoice-level "cost savings" estimate to share with clients.

Start Building Output-Based Pricing Menus

- The obvious place to start is to look back at what various tasks cost the firm historically.
- BUT historical costs will become increasingly irrelevant as AI adoption grows. Use this transitional period to figure out what your costs look like with AI.

Four pieces have to be rebuilt in parallel

The math forces the external pricing pivot; the internal work makes it hold past the second renewal cycle.

Pricing capability	Scoping discipline	Compensation calibration	Operational metrics
Know what the work actually costs. Most firms have the data; few have surfaced it for pricing. Start building your menu prices now.	Output pricing only works if scope is clearly defined. Without it, scope creep eats margin invisibly.	So partners running efficient fixed-fee work aren't disadvantaged, and associate comp doesn't penalize fewer hours.	Replace utilization with profit per matter, cycle time, client satisfaction, realization by engagement.

Training the Next Generation

You can outsource your thinking, not your understanding

Different Agentic Skills for Training Associates

- With agentic AI, you can create skills to guide repeatable processes.
- The skill for the partner does the work so a partner can review
- The skill for a the junior associates doesn't just do the work, it teaches

Making New Associates Work **Without** AI First

- For really junior associates, it may be helpful to have them do things manually before letting them use AI
- But careful, clients will likely not want to pay for this as the AI output will be better than what the junior produces

AI-enabled law firms will change the game

Dimension	Status quo	AI-enabled firms
Economic model	Billable hours	Output-based
Margin profile	25-35%	50-70%
Scalability	Add associates	Software + compute
Partner leverage	1 : 5 associates	1 : 2 associates + AI
Workforce	Associate pyramid	Senior lawyers + AI ops
Knowledge advantage	Tacit, partner-locked	Codified, compounding
Client experience	Variable timelines	Instant, predictable
Speed to delivery	Weeks-months	Hours-days
Growth constraint	Human capital	AI capability





Thank you



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GRAND BALLROOM II (main session room) >

**REWIRING GLOBAL SUPPLY CHAINS WITH NEW
TRADE ALLIANCES IN A FRAGMENTED WORLD**

GRAND BALLROOM I (next door) >

**GAME ON: LEGAL CHALLENGES BEHIND GLOBAL
SPORTS AND ENTERTAINMENT EVENTS**

BREAKOUT | REWIRING GLOBAL SUPPLY CHAINS WITH NEW TRADE ALLIANCES IN A FRAGMENTED WORLD

Moderator

- **Greta Peisch > Wiley (US: Washington, DC)**

Panelists

- **Bettina Mertgen > GvW Graf von Westphalen (Germany)**
- **Kathy Porter > Robinson+Cole (US: Massachusetts)**
- **Alison Ross Eckford > Mills & Reeve (UK)**

A VIEW FROM THE CLIENT'S CHAIR: HOW IN-HOUSE COUNSEL ARE PREPARING FOR WHAT COMES NEXT

Moderator

- **Diana Shaw > Wiley (US: Washington DC)**

Panelists

- **Nick Carden, Director and Associate General Counsel, Coinbase**
- **Eric Estes, General Counsel, Xcaliber International**
- **Patricia Lee, General Counsel, Washington Metropolitan Area Transit Authority**
- **Kim Shur, SVP and Associate GC + Chief Compliance and Privacy Officer, Marriott International**

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