



MANAGING PARTNER
SUMMIT

PRESENTED BY:

TAG Academy



*VINOY® RENAISSANCE RESORT & GOLF CLUB
ST. PETERSBURG, FL
MARCH 22-23, 2012*



LawVision 

Creating Competitive Advantage



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WHAT IS THE MANAGING PARTNER SUMMIT?

**ST. PETERSBURG, FL
MARCH 22-23, 2012**

This Spring, join other TAGLaw Managing Partners (MPs) in St. Petersburg, Florida for our **2nd Managing Partner Summit**. This program has been specifically designed for TAGLaw MPs to provide a non-competitive environment which facilitates effective roundtable discussions among firms who face similar firm management issues. The topics for the interactive roundtable discussions will be guided by our moderators and by the results of a survey sent out prior to the Summit. We are fortunate to have Silvia Coulter and Mike Short, Principal Consultants, LawVision Group to moderate the roundtable discussions, to speak about the MP's role in driving growth and to facilitate a session using a case study.

As you can see below, we have received great reviews from TAGLaw MPs on last year's program, and we hope we can add you to the list of satisfied attendees.

I look forward to seeing you in March.

Regards,



Robert U. Sattin
President
TAGLaw | TAG Academy | TIAG
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“It provided a unique opportunity to review in detail with peers the issues important to law firm management without concerns about competition.” - Past Attendee

“It's really the most effective way for mid-size firms to communicate on these issues. Plus there's a certain amount of trust between the firms that makes MPs more willing to share their thoughts.” - Past Attendee

Very well done, touched on many issues and summarized relevant analysis on them.” - Past Attendee



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AGENDA

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PRE-SUMMIT SURVEY

- To help effectively guide our roundtable discussions, attendees will be asked to complete a short questionnaire about the relevant topics and issues facing them.

THURSDAY, MARCH 22

- **Dinner at Fred's Steakhouse** - Enjoy a delicious dinner and valuable networking with fellow TAGLaw managing partners and their guests.
- **Welcome to the Managing Partner Summit** - Meet Peter Appleton Jones (TAGLaw Chairman & Founder) and Bob Sattin (TAGLaw President) and the other TAGLaw managing partners.

FRIDAY, MARCH 23

- **Opening Presentation** – “*Developing Practice Trends and Your Role as Managing Partner in Driving Growth*” - Presented by Michael Short and Silvia Coulter, Principal Consultants at LawVision Group. Based on 2011 final Thomson Reuters Peer Monitor Reporting Data and Hildebrandt Institute/LawVision Group Business Development Trends Research Study).
- **1st Managing Partner Roundtable***
- **Morning Break**
- **2nd Managing Partner Roundtable***
- **Lunch**
- **Case Study** – Michael Short and Silvia Coulter, Principal Consultants at LawVision Group, will help attendees work through an actual case study.
- **3rd Managing Partner Roundtable***
- **4th Managing Partner Roundtable***
- **Closing Session** – “What Have We Learned and How Will It Impact My Firm Management?”
- **Cocktails and hors d'oeuvres**

“Very helpful to have contact with other MP’s who are not competitive, yet face similar issues.” - Past Attendee

GOLF NETWORKING

(Thursday & Saturday) We can arrange tee times for those interested in networking with other TAGLaw MPs, while working on their golf game. Suggested courses include: Feather Sound Country Club and/or the Vinoy Golf Club. (Not included in registration price.)

*The issues in the Managing Partner Roundtables will be guided by the results of the web-based survey of participants and by our moderators’ extensive experience with law firms and managing partner issues.



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MODERATOR

SILVIA COULTER

Silvia Coulter is a Co-founding Partner of LawVision Group and leads the firm's Client Development and Strategic Growth Practice. Law firms rely on Silvia's substantial experience in collaborating with them on their business development and key client retention and growth strategies, client service strategies and process improvement initiatives. Prior to co-founding LawVision Group, Silvia chaired the Client Development Practice at Hildebrandt. Silvia is a recognized leader in law firm business development strategy and is a frequent speaker at legal industry conferences, and law firm retreats. Silvia has spent twenty years as a consultant to the industry and has served as chief marketing and business development officer at two Global 50 firms.



KEY SERVICE AREAS

- Client Retention and Growth Planning/Strategic Account Management
- Business Development Skills Training and Coaching
- Client Feedback Interviews
- Process Improvement, Legal work Re-engineering and Client Service Improvement
- Mergers & Acquisitions - Candidate Firm Analysis; Business Development Analysis
- Marketing and Business Development Firm Wide Audits

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RECENT REPRESENTATIVE EXPERIENCE

- Developed and conducted a SAM (Strategic Account Management) program to refine a firm's overall key client strategy. This included developing an overall framework for team leaders; team members; meeting agenda; training and overall plan goals, measures and outcomes. Helped the firm to drive upwards of 25% increase in overall revenue from its specific target clients.
- Assisted a global 25 firm with its client retention and growth strategy by conducting a series of senior-level customized client feedback interviews to strengthen the firm's client retention and growth opportunities.
- Successfully launched a legal process improvement project for a firm's most significant practice group. This included legal work re-engineering; a strategic sales plan for reaching out to target clients with a new value proposition and overall pricing strategy.
- Conducted marketing audits for several global 100 firms. Developed new roles, responsibilities and an overall more comprehensive sales and marketing organization to provide stronger support to its global offices.
- Helped partners to deliver over \$3 million in new revenue through a 12-month senior partner sales coaching program.



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MODERATOR

MICHAEL D. SHORT

Michael Short counsels law firms and other types of professional service firms around the world on a wide range of strategic, management, and operational issues (summarized below). His client base ranges from small, “local” firms in many countries to large, multi-national firms and includes many practice boutiques as well. He strives to establish long-term relationships with each client, based on his ongoing role as a trusted confidant and counselor.

Over the course of his career he has worked with well over 600 law firms. He started as a law firm consultant in 1988 as a member of the law firm consulting group at Price Waterhouse (later, PriceWaterhouseCoopers). He then joined Hildebrandt International in 1999, stayed through several name variations of that consultancy (Hildebrandt Baker Robbins, HBRConsulting), supported several Hildebrandt Institute programs, and is now one of the founding members of The LawVision Group. He is based in the firm’s Washington, DC office.

In addition to client work, he is also a frequent speaker and writer on most law firm leadership and management topics. Presentation audiences include national and local organizations (Bar Associations, ALA national or chapters), established law firm networks and affiliations, and trade or industry organizations. For several years, Michael wrote a monthly column for Lexpert Magazine entitled “Strategy Forum”. His final piece for the publication entitled “There Is No Finish Line”, was published in October 2011 and discusses the strategic planning process. Michael is called upon regularly by the legal industry press for quotes and comments.



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KEY SERVICE AREAS

- Strategic Planning - Assists law firms, practice groups, industry teams, client teams, and pro bono programs with all aspects of developing and implementing strategic plans
- Mergers and Acquisitions - Helps firms identify merger opportunities that are consistent with their strategies
- Management and Governance - Assesses law firm governance and management approaches and assists in their refinement and alignment with strategic goal
- Partnership Compensation - Works with firms to identify and implement an appropriate compensation system
- Practice Management - Works with firms to develop effective practice management structures that will align practice and geographic goals and business plans with overall firm goals
- Infrastructure/Administration - Analyzes the strategic alignment of administrative support structures with firm goals and objective
- Finance - Analyzes the economic performance of firms/individual practice groups and develops revenue enhancement and expense control strategies to improve performance

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LOCATION

**ST. PETERSBURG, FL
MARCH 22-23, 2012**

Come to the TAGLaw headquarters in sunny St. Petersburg, Florida... the city that holds the Guinness World Record for most consecutive days of sunshine (a stretch lasting 768 days that began in 1967), has the largest city marina in the United States, and has 244 miles of shoreline.

Attractions: Located in the Greater Tampa Bay area, there is much to do in the Sunshine City of St. Petersburg. Visitors can soak up the sun at the beach, play a round of golf (or two), browse through a world-class museum or stroll along streets lined with graceful Mediterranean-style architecture. There are six museums in St. Petersburg alone, including the Florida International Museum (a Smithsonian Institution affiliate), a Museum of Fine Arts, the Salvador Dali Museum, the Florida Holocaust Museum, and the recently opened Chihuly Collection. Also consider one of the many opportunities to see your favorite Major League Baseball team at one of the many spring training facilities in the area. Teams of note include: the New York Yankees (Tampa), Philadelphia Phillies (Clearwater), Boston Red Sox (Fort Myers), and Toronto Blue Jays (Dunedin).



Whatever your taste, St. Pete offers everything under the sun. Visit St. Pete's nearest neighbor, Tampa—a city with its own identity and cultural pulse. There are theme parks, zoos and a plethora of additional shopping centers. Busch Gardens, the Lowry Park Zoo and the Florida Aquarium are just 30-40 minutes away.





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AREA ATTRACTIONS

Golf

Visit www.fgolf.com/stpete.htm for a list of area golf courses.

(Thursday & Saturday) We can arrange tee times for those interested in networking with other TAGLaw MPs, while working on their golf game. Suggested courses include: Feather Sound Country Club and/or the Vinoy Golf Club. (Not included in registration price.)

Salvador Dalí Museum

www.thedali.org

1000 Third Street South, St. Petersburg FL; Tel. 1 800 442 3254

Florida Holocaust Museum

www.flholocaustmuseum.org

55 Fifth Street South, St. Petersburg FL 33701; Tel. 1 727 820 0100

Florida International Museum

www.floridamuseum.org

100 Second Street North, St. Petersburg FL; Tel. 1 800 777 9882

Museum of Fine Arts

www.fine-arts.org

255 Beach Drive Northeast, St. Petersburg FL; Tel. 1 727 896 2667

Chihuly Collection - Morean Arts Center

www.moreanartscenter.org

400 Beach Drive NE, St. Petersburg, FL, FL; Tel. 1 727 821 5623

ATTRACTIONS BY PROXIMITY

BEACHES

St. Pete Beach	10 Miles
Pass-a-Grille Beach.....	10 Miles
Ft. DeSoto Park	15 Miles
Clearwater Beach	20 Miles

SPORTS

Spring Training:

Phillies (Clearwater)	18 Miles
Blue Jays (Dunedin).....	20 Miles
Pirates (Bradenton)	25 Miles
Yankees (Tampa).....	25 Miles
Orioles (Sarasota).....	35 Miles
Red Sox (Ft. Myers).....	125 Miles

MUSIC, DANCE, CINEMA AND THEATER

The Palladium	3 Blocks
Muvico (20 screens).....	3 Blocks
American Stage	4 Blocks
Mahaffey Theater	8 Blocks
FreeFall Theater	4 Miles
Ruth Eckerd Hall.....	15 Miles
Straz Center.....	20 Miles



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HOTEL & TRAVEL

ST. PETERSBURG, FL
MARCH 22-23, 2012

HOTEL

Vinoy® Renaissance St. Petersburg Resort & Golf Club

Address: 501 5th Avenue NE • St. Petersburg, Florida, USA 33701

Toll Free: +1 888 303 4430

Local: +1 727 894 1000

Fax: +1 727 502 9088

Note: A block of rooms has been reserved. Please call and use the code “appappa” when booking your room to receive the special conference rate of \$219 per night or visit the link below. Group rate is valid 03/20/12 thru 03/24/12.

<http://www.marriott.com/hotels/travel/tpasr-vinoy-renaissance-st-petersburg-resort-and-golf-club/?toDate=3/24/12&groupCode=appappa&fromDate=3/20/12&app=resvlink>

TRANSPORTATION

AIR TRAVEL

Tampa International Airport - Though the Tampa Bay area has several serviceable airports, Tampa International Airport (TPA) is the most accommodating for domestic and international flights. For more information visit www.tampaairport.com.

St. Petersburg / Clearwater International Airport - A smaller airport which has flights from smaller regional airports. For more information visit www.fly2pie.com.

FROM THE AIRPORT

Transportation to the Hilton from the Tampa International Airport is available by using either a taxi, (between \$40-50 one way), or the **Super Shuttle** (approximately \$25 one way and you will need to make a reservation at least 24 hours in advance; call **+1 727 572 1111**). It takes about 30 minutes to go from the Tampa International Airport to the Vinoy by taxi. The Super Shuttle takes a little bit longer as it makes several stops at various hotels. For limousine service, you may call Elizabeth Limousine at **+1 727 455 8909** or the Vinoy Hotel at **+1 727 894 1000**.



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REGISTRATION

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ATTENDEE AND GUEST INFORMATION

Attendee Name: _____

Attendee Title: _____

Firm Name: _____

Attendee Email Address: _____

Guest Name: _____

PRICING INFORMATION

(Prices are in U.S. Dollars.)

	PRICE	QUANTITY	SUBTOTAL
Managing Partner Summit Attendee (per person):	\$1425.00 x	1 =	\$1425.00
Guest Dinner and Museum Tour (per person):	\$100.00 x	=	

TOTAL COST:

Golf Networking



(Thursday & Saturday)
We can arrange tee times for those interested in networking with other TAGLaw MPs, while working on their golf game. Suggested courses include: Feather Sound Country Club and/or the Vinoy Golf Club. (Not included in registration price.)

Yes, I'm interest in golfing.

PAYMENT INFORMATION

PAYMENT BY CREDIT CARD:

Card Type: Visa MasterCard American Express

Full Name on Card: _____

Card #: _____

Expiration Date: ____/____

Email Address: _____

Authorized Signature: _____

Multiple Attendee Discount

If you plan on bringing a colleague who is in line to be a managing partner, please complete a second registration form and apply a **20% discount** for the second person.

HOW TO SUBMIT:

Please complete this form and fax to Jacky Breedon at +1 727 895 3722.

PAYMENT BY WIRE TRANSFER:

Email jacky@taglaw.com for wire transfer information.