



Spring Conference
2 - 4 May 2024
Manchester, England UK



Host Firm:

forbessolicitors.



LawPact Spring 2024 Conference Agenda

May 2 - 4, 2024

Kimpton Clocktower Hotel, Manchester, England

Put Your Firm on the Cutting Edge

Thursday May 2, 2024		
Board Meeting and Welcome Reception		
4:00 – 5:00 PM	Board Meeting: All Members are invited to attend.	Forbes Solicitors' offices 1 Balloon Street, Manchester
7:00 – 10:00 PM	Welcome Reception: Please join LawPact members and guests for an opportunity to review the past six month's happenings and welcome our new participants.	The Winter Garden Kimpton Clocktower Hotel, Manchester
Friday May 3, 2024		
(The Directors' Suite)		
7:30 – 8:30 AM	Breakfast	The Refuge Restaurant
8:30 – 10:00 AM	Welcome, Opening Remarks, and Member Firm Introductions Delegates introduce themselves and provide updates about their firms	Pauline Wild , Managing Partner, Forbes Solicitors Doug Conover , LawPact President
10:00 – 10:15 AM	Break	
10:15AM – 12:00 PM	Developing Leadership Skills	Sarah McDowell , The Leader Centre
12:00 – 1:30 PM	Lunch	The Dan (private area of The Refuge)

1:30 – 2:15 PM	Out Approaches to Pricing – Contentious and Non-Contentious Ways of Working	John Pickervance and Stephen McArdle, Forbes Solicitors
2:15 – 3:30 PM	Artificial Intelligence Topic – New Product for the Legal Industry	Matthew Griffiths, Sundown Solutions
3:30 – 4:15 PM	Cyber Safety – Best Practices to Protect Your Firm and the Cyber Essentials Certification	Michael Houghton, Forbes Solicitors
4:15 – 4:45	Friday Wrap-up	
7:00 PM	Dinner	Fumo, 1 St Peters Square Oxford Road, Manchester

**Saturday May 4, 2024
(The Directors' Suite)**


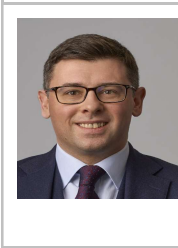
7:30 – 8:30 AM	Breakfast	The Refuge Restaurant
8:30 - 9:15 AM	Friday Follow Up Discussion and Takeaways	Ian Wick and Frederic Beele (discussion leaders)
9:15 - 10:30 AM	Regional Breakout Session	
10:30 – 10:45 AM	Break (Adjust time as necessary)	
10:45 – 11:15 AM	Corporate Transparency Act – What is the Latest?	
11:15 – 12:00 PM	Roundtable discussion	
12:00 – 12:45 PM	Member Discussion – Open forum regarding LawPact and what we can be doing to support our members. LawPact Business Membership Development Website and Forums Future Conference Schedule Final Announcements	Doug Conover
12:45 – 1:30 PM	Lunch	The Dan (private area of The Refuge)
1:30 – 4:00 (approximate)	Group Event – Museum and Stadium Tour of Old Trafford – Manchester United Football Stadium	Meet in the hotel lobby
5:00 (approximate)	Group Dinner optional	








**2024 Spring Conference
Manchester, England United Kingdom
May 2-4, 2024**

Conference Delegates and Guests

Program Presenters

	<p>Sarah McDowell The Leader Centre Manchester, England</p>
	<p>Stephen McArdle Forbes Solicitors Manchester, England</p>
	<p>Matthew Griffiths Sundown Solutions Manchester, England</p>
	<p>Michael Houghton Forbes Solicitors Manchester, England</p>

Delegates and Guests
(Alphabetical by firm name)

	<p>Kenichi Yagi Adair Myers Stevenson Yagi PLLC Houston, Texas</p> <p>Guest: Masae Tomada</p>
	<p>Steven Cole Adams Leclair LLP Albany, New York</p>
	<p>Takashi Shinano Asai Law Firm Osaka, Japan</p>
	<p>Frederic Beele Lawfirm Beele Gent, Belgium</p>
	<p>Daniel Park Berman Fink Van Horn Atlanta, Georgia</p> <p>First Time Delegate</p>



Kipp Williams
Blanchard, Krasner & French
La Jolla, California



Nathan Welch
Bowen, Radabaugh & Milton, P.C.
Troy, Michigan



Nicole Windsor
Bowie & Jensen, LLC
Towson, Maryland



Robert Brouillette
Brouillette Law
Montreal, Quebec
Canada

Member of the Board of Directors

Guest: Francine LeDuc



Philippe Brouillette
Brouillette Law
Montreal, Quebec
Canada

Guest: Marie-Christine Anctil



Douglas Conover
Law Offices of Douglas Conover LLC
Chicago, Illinois

President of LawPact and Member of the Board of Directors

Guest: Cindy Conover



Giacomo Olivati
Cortellazzo & Soatto
Padova, Italy



Nicola Soave
Cortellazzo & Soatto
Padova, Italy



Yair Estline
Estline & Co.
Tel Aviv, Israel



Shoshana Rabinowitz
Estline & Co.
Tel Aviv, Israel

Guest: Michael Rabinowitz



John Pickervance
Forbes Solicitors
Manchester, England

Member of the Board of Directors of LawPact



Pauline Wild
Forbes Solicitors
Manchester, England

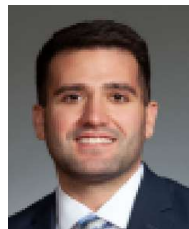


Todd Oberdick
Forge IP, PLLC
Shelton, Connecticut



David Gaw
Gaw Estate Planning
Napa, California

Vice President - North America, and Member of the Board of Directors



Christopher Clemson
Gordon, Fournaris & Mammarella, P.A.
Wilmington, Delaware

Guest: Sarah Yannes



Thomas Mammarella
Gordon, Fournaris & Mammarella, P.A.
Wilmington, Delaware

Guest: Barbara Marsh



Scott Collins
Helsell Fetterman LLP
Seattle, Washington

Guest: Susan Edison



Kameron Kirkevold
Helsell Fetterman LLP
Seattle, Washington

Guest: Julie Kirkevold



Nathan Watson (firm administrator)
Hellsell Fetterman LLP
Seattle, Washington

LawPact Website Committee



Ian Wick
KMB Law
Mississauga, Ontario
Canada

Member of the Board of Directors of LawPact



John Ambrogi
Latimer LeVay Fyock
Chicago, Illinois

Guest: Loyanna Grierson



Bernd Lichtenstern
Lichtenstern and Partners
Landsberg am Lech & Munich
Germany

Member of the Board of Directors of LawPact



Christel van den Reek
Mark Advocaten
Breda, The Netherlands

Guest: Reiner Mayer



Eric Ostroff
Meland • Budwick
Miami, Florida



Bryan Dardis
Meyers Roman Friedberg & Lewis
Cleveland, Ohio



Martin Preslmayr
Preslmayr Legal
Vienna, Austria

Guests: Anna Preslmayr and Xena Preslmayr

Member of the Board of Directors of LawPact



Filipe do Vale
Santiago Mediano
Lisbon, Portugal



Melinda Leaver Roy
Sherman Sherman Johnnie & Hoyt
Salem, Oregon



Carl Jacobson
Synergy Business Lawyers
Vancouver, British Columbia
Canada



Sergio Yarritu
Yarritu Gonzalez y Asociados
Mexico City, Mexico



Madeleine ("Maddy") Lebedow
MfL Associates, Inc.
Lincolnwood, Illinois

Executive Director of LawPact



**Board of Directors' Meeting
Forbes Solicitors
1 Balloon Street
Manchester**

**Thursday, 2 May 2024
16:00 GMT**

LawPact Board of Directors:

Robert Brouillette
Mark Hoyt
Scott Pohlman
Ian Wick

Douglas Conover
Bernd Lichtenstern
Martin Preslmayr

Dave Gaw
John Pickervance
Kathy Speaker MacNett

Invited Guests:

Madeleine Lebedow, Executive Director
Nathan Watson, Technical Advisor
Sherri Cook, Media Advisor
Yair Estline

Philippe Brouillette
Scott Collins
Eric Siegel

Kenichi Yagi
Kipp Williams
Frederic Beele

Treasurer's Report:

Old Business

Weekly Zoom Conferences
May 2-4, 2024 Manchester, England
Fall 2024: October 24-26, Houston, Texas
Spring 2025: Delaware
Membership Development

New Business

LawPact Goals for 2024
LawPact Europe (Bernd Lichtenstern, John Pickervance, and Martin Preslmayr)
LawPact Latin America
Future Meetings
LawPact Marketing Committee
Other new business?

Next meeting: June 12, 2024 (conference call) via Zoom

Adjournment

Sarah McDowell - The Leader Centre

Bio: Having spent almost 20 years developing Senior Executives Sarah understands the challenges of running a successful business.

From corporate life at American Express to Chair and Head of Chairman Development at The Academy for Chief Executives. Sarah spent has spent many years developing solutions that enable business leaders to thrive. Now running her own business, The Leader Centre Sarah works with executives to help them increase the value of their business and to get the best from their teams.

To find out more connect with Sarah. [Sarah McDowell \(BSc Hons Psych\) | LinkedIn](#)

Session Overview: The world is experiencing unprecedented levels of change, politically, environmentally, socially and economically.

These changes have significantly affected businesses and trends that were already happening have accelerated. People are stressed, they want to work less, they want to work from home, they move on more and they are less resilient.

Given this backdrop people want to re-negotiate their relationship with work and are looking for more enjoyable working environments and more sensible working practices. What people want from work today and how they want to work has changed.

Our job as leaders is to find a way through these changes. In this session Sarah will share ideas about what will make the most significant difference but in a way that is good for the business, for leaders and for people.

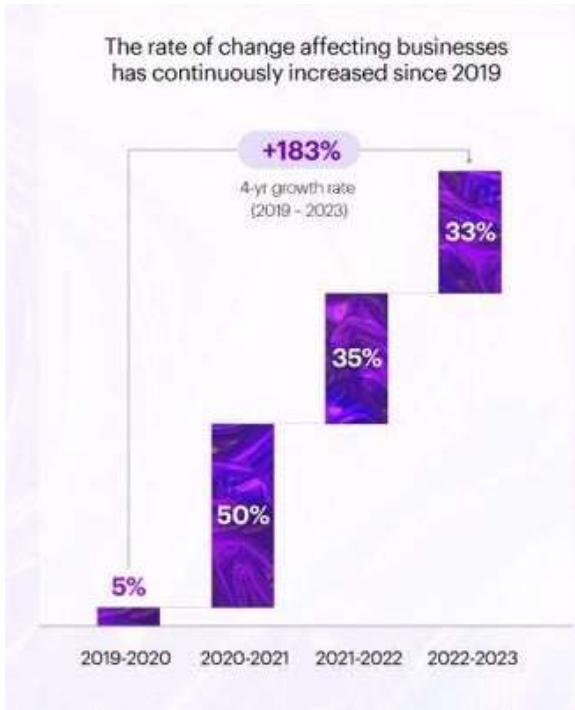
Sarah's slides from her presentation will be distributed after the conference.

THE
LEADER
CENTRE
CREATING EXCEPTIONAL LEADERS

#DoLessToAchieveMore

Running a business is like staring
into the abyss whilst chewing glass

Elon Musk



C-suite leaders' perception

Technology is also seen by C-suite leaders as the top cause of change*

2023

#1	Technology
#2	Geopolitics
#3	Consumer & Social
#4	Talent
#5	Economic
#6	Climate

Heading into 2024

88% expect an even faster rate of change in 2024

52% say they are not fully prepared to respond to change.

*Based on a global survey of 3,450 C-suite executives, across 20 countries and 19 industries.

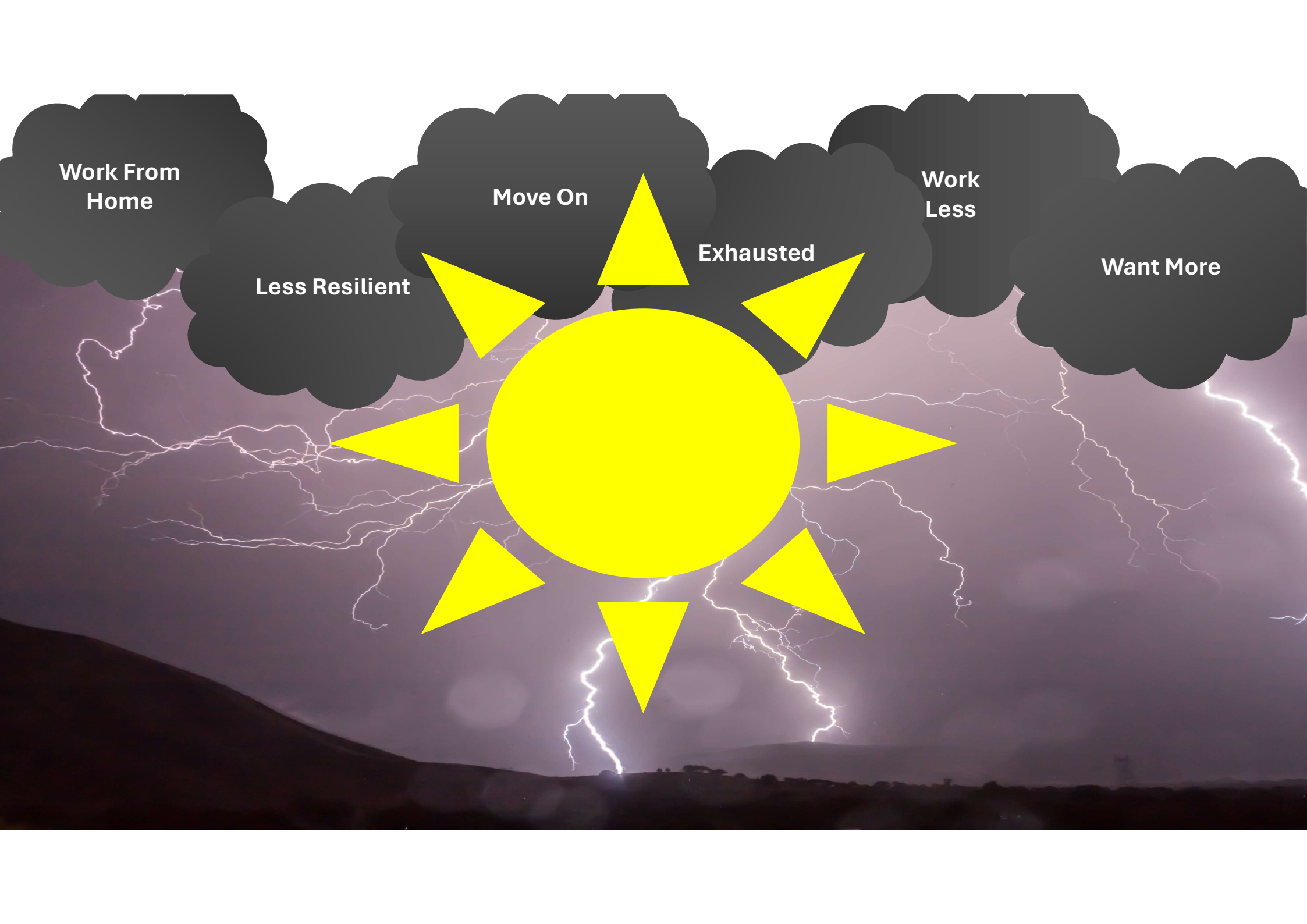
Technology rose to #1 cause of change*

	2023	2022
#1	Technology	Talent
#2	Talent	Economic
#3	Climate	Geopolitics
#4	Economic	Consumer & Social
#5	Geopolitics	Climate
#6	Consumer & Social	Technology

*Ranking is based on % of increase measured from 2022 to 2023 for each of the six factors.

Accenture Pulse of Change Survey

#DoLessToAchieveMore



Work From
Home

Less Resilient

Move On

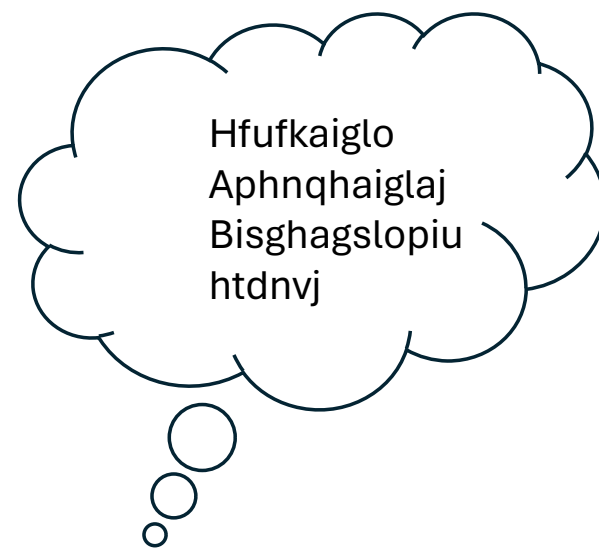
Exhausted

Work
Less

Want More

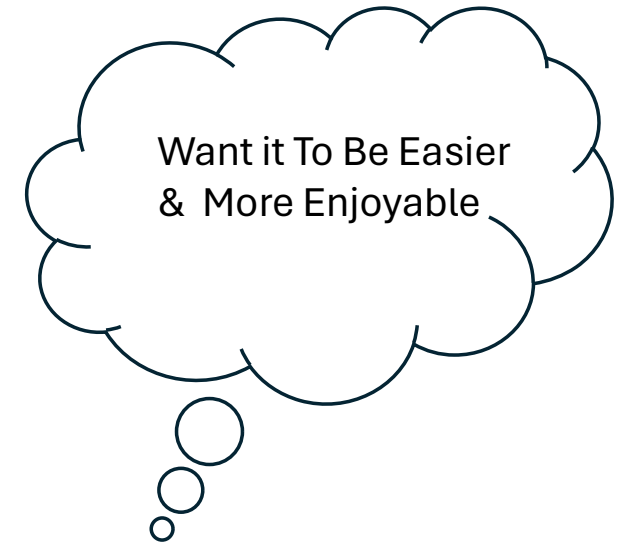


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Hfufkaiglo
Aphnqhaiglaj
Bisghagslopiu
htdnvj

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A paid
PeoplePlus Life
Event Day each
year



25 days annual
leave



Cycle to Work
scheme



Access to
hundreds of
discounts via the
Additions portal



Employee
Assistance
Programme



Access to online
wellbeing centre



Enhanced
Wedding leave



A paid
volunteering day
each year



Enhanced Maternity
scheme



Sharesave
scheme



Refer a Friend reward
scheme



Holiday purchase
scheme



Pension
scheme

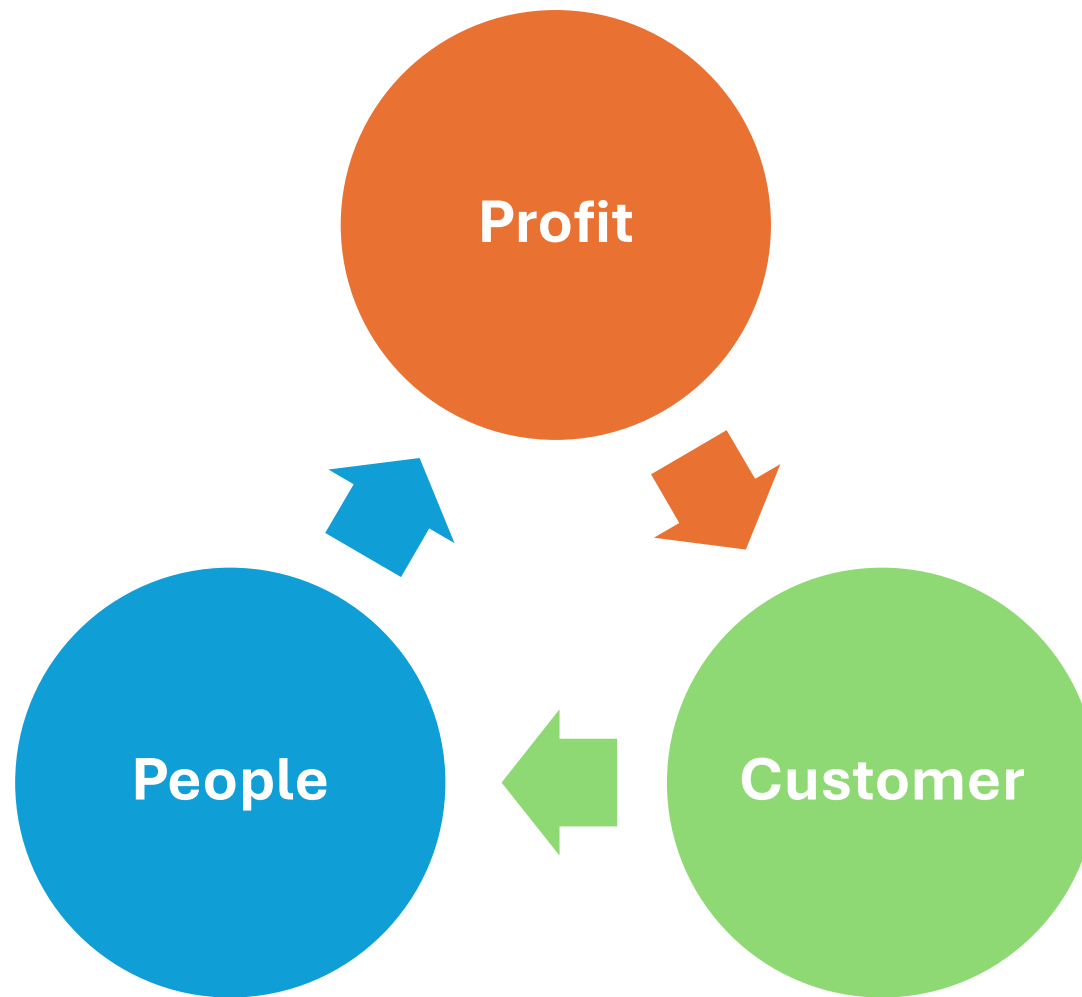


Life
assurance

#DoLessToAchieveMore



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#DoLessToAchieveMore

1. Reduce Stress



Be More Choosy

What will you say no to?

**Improve
Management**

How can management improve?

**Do Difficult
Things**

What are the big issues?

Be Honest

What can you be more honest about?

2. Do What Matters



Give People More Control

Where are people over managed?

Make it Meaningful

What difference does your firm make?

Promote Work/Life Balance

How can we reduce OOO working?

Cut Bureaucracy

What makes work difficult?

Which Way Will You Go?

**More of the
Same**

**Something
New**



Sarah McDowell (BA Hons Psych)

Owner - The Leader Centre

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Questions

- ❖ What outcome did you want? What outcome did you get?
- ❖ What went well? What helped with that?
- ❖ What didn't go well? How come?
- ❖ What progress have you made? What helped with that? Why did it help?
- ❖ What stopped you? How can you overcome it?
- ❖ What were the highlights? What made them highlights?
- ❖ What was tough? Why was it tough? How did you overcome it?
- ❖ What made the biggest difference? How did it make a difference?
- ❖ What do I need to know? Why that?
- ❖ What can you do? What difference will that make?
- ❖ What's important? What makes it important?
- ❖ What are your actions ? Why those? What will you do now?

Having Honest Conversations

What people want

1. Some control of the situation
2. For managers to have their back
3. To feel respected

Do's

1. Ask for permission
2. Do it face to face
3. State what you know (stick to the facts)
4. Ask for people's opinion about what happened
5. Ask how they feel about it
6. Don't let people say they don't know
7. Show empathy
8. Acknowledge emotion
9. Ask for people's opinion on how to fix things
10. Agree a way forwards



Don'ts

1. Give feedback on behalf of someone else
2. Include everyone when it's 1 person
3. Beat about the bush
4. Be aggressive /emotional / humorous
5. Do it by email
6. Judge and point fingers
7. Transfer them somewhere else
8. Assume anything
9. Ignore it



Sarah McDowell BSc (Hons) Psychology

Owner - The Leader Centre

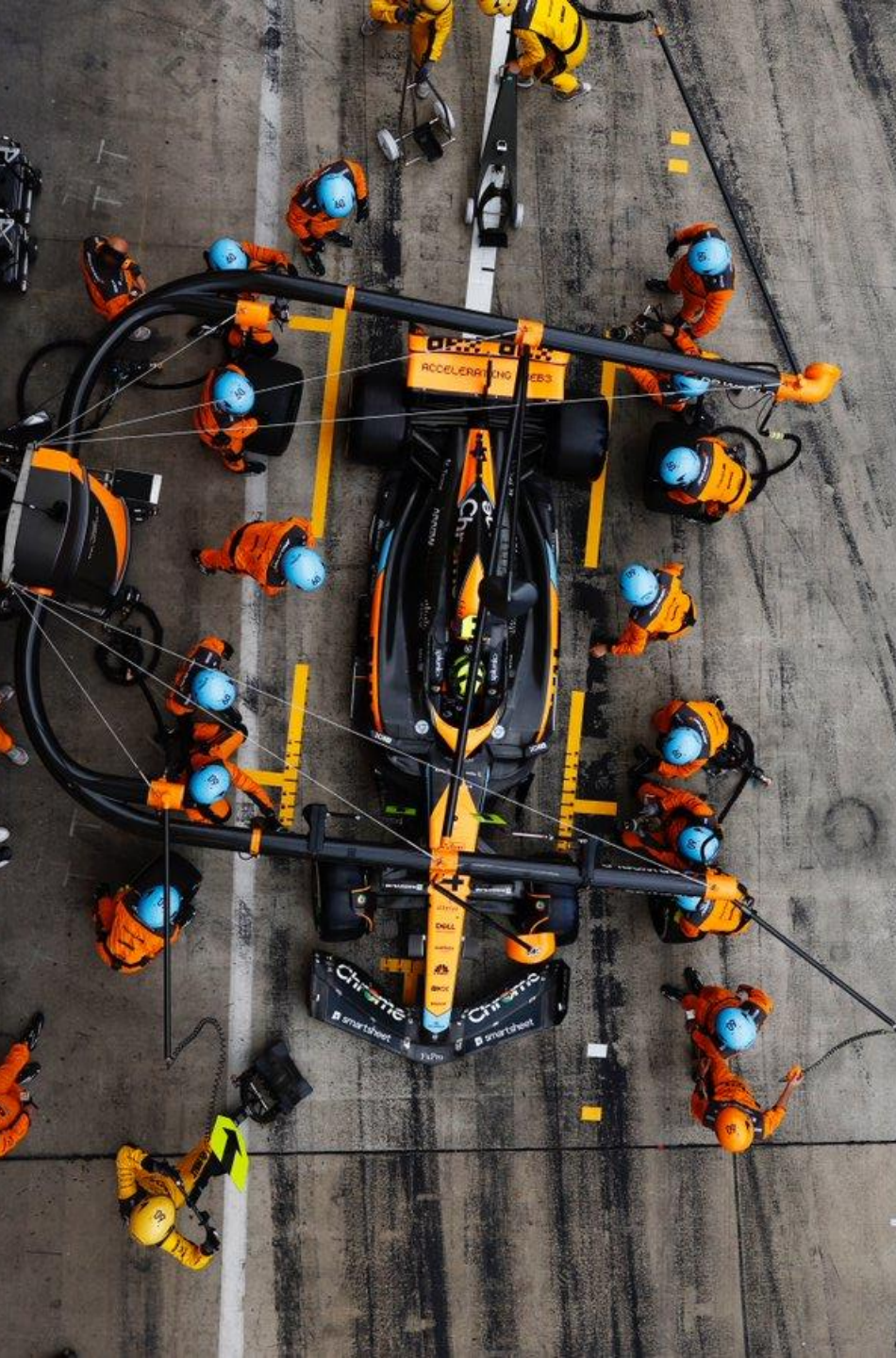
Creating Exceptional Leaders

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www.theleadercentre.co.uk

<https://uk.linkedin.com/in/sarahmcdowell1>

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Sundown Solutions

The Practical Application of AI



Friday 3rd May 2024

Microsoft Partner
Azure Expert MSP



Sundown

Technology that works for you



Agenda

- Introductions
- **Today's Topic – The Practical Application of AI**
 - AI Scene Set
 - When is AI not AI?
- Spectrum of AI Attitudes and Deployments) – including DEMONSTRATION
- **The Business of AI**
 - Use Cases, ROI, Iteration, Ongoing Continuous Improvement)
 - Preparation for AI... getting your house in order.
- DEMONSTRATION – When you don't want just vanilla... / Covert vs. Overt AI
- Concluding Points / Q&A

Introductions



- **Tom Meadon – Chief Technology Officer**

Responsible for Technical Leadership, Oversight and Governance Tom is experienced IT architect and engineer.



- **Matthew Griffiths – Head of Client Delivery**

Responsible for Sundown's PMO and Service Management Organisation whilst working closely with Sundown's Commercial Team.

Who are Sundown Solutions?

- Leading Azure Expert Microsoft service provider delivering Managed Services, Consultancy, Engineering and DevOps to support our clients with their technical and business transformation needs.
- Experience across the Microsoft ecosystem including Azure, M365 & Modern Workplace (EUC /SharePoint/Teams), SQL and AI technologies.
- Established in 2009 we are led by a team of Microsoft Experts who have proven experience in delivering transformational change and development whilst ensuring security requirements, regulation and standards are adhered to.
- Expertise drawn from operating within regulated and secure market sectors.
- By leveraging our broad engineering and development capabilities, delivering client outcomes and adopting a pragmatic and collaborative approach we ensure that we build strong long-term client partnerships.

Sundown Clients

Our client base is drawn from across financial services, banking, insurance, legal, health, bioscience, pharma, and FMCG.

We have also worked extensively across the Public Sector including national security, blue-light, and the NHS.

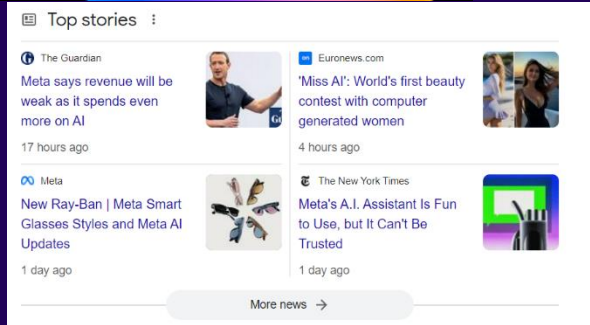
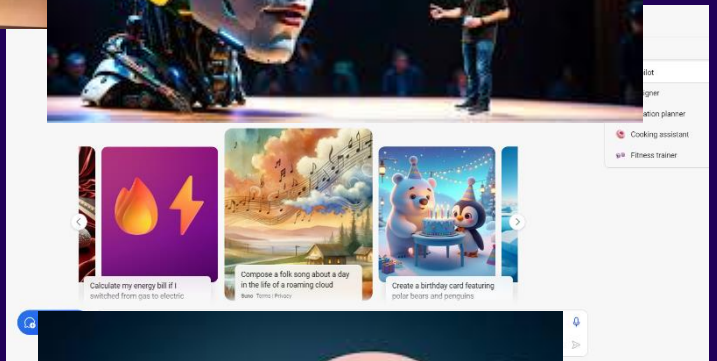




Today's Topic

The Practical Application of AI

AI Scene Set



The Transformation Journey

Every organisation is unique and their path and pace different.

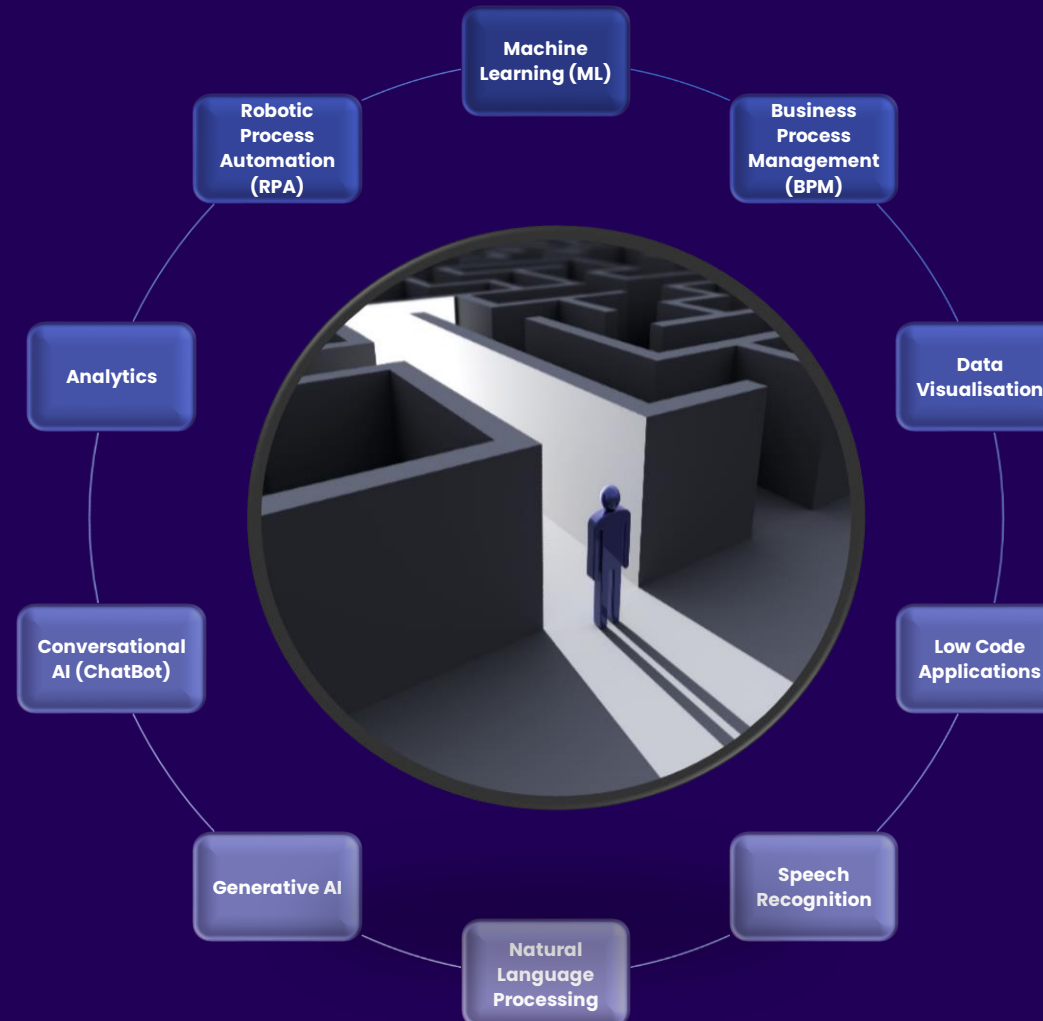


*Other Clouds platforms are available and on-premise has an ongoing role for certain workloads/applications.

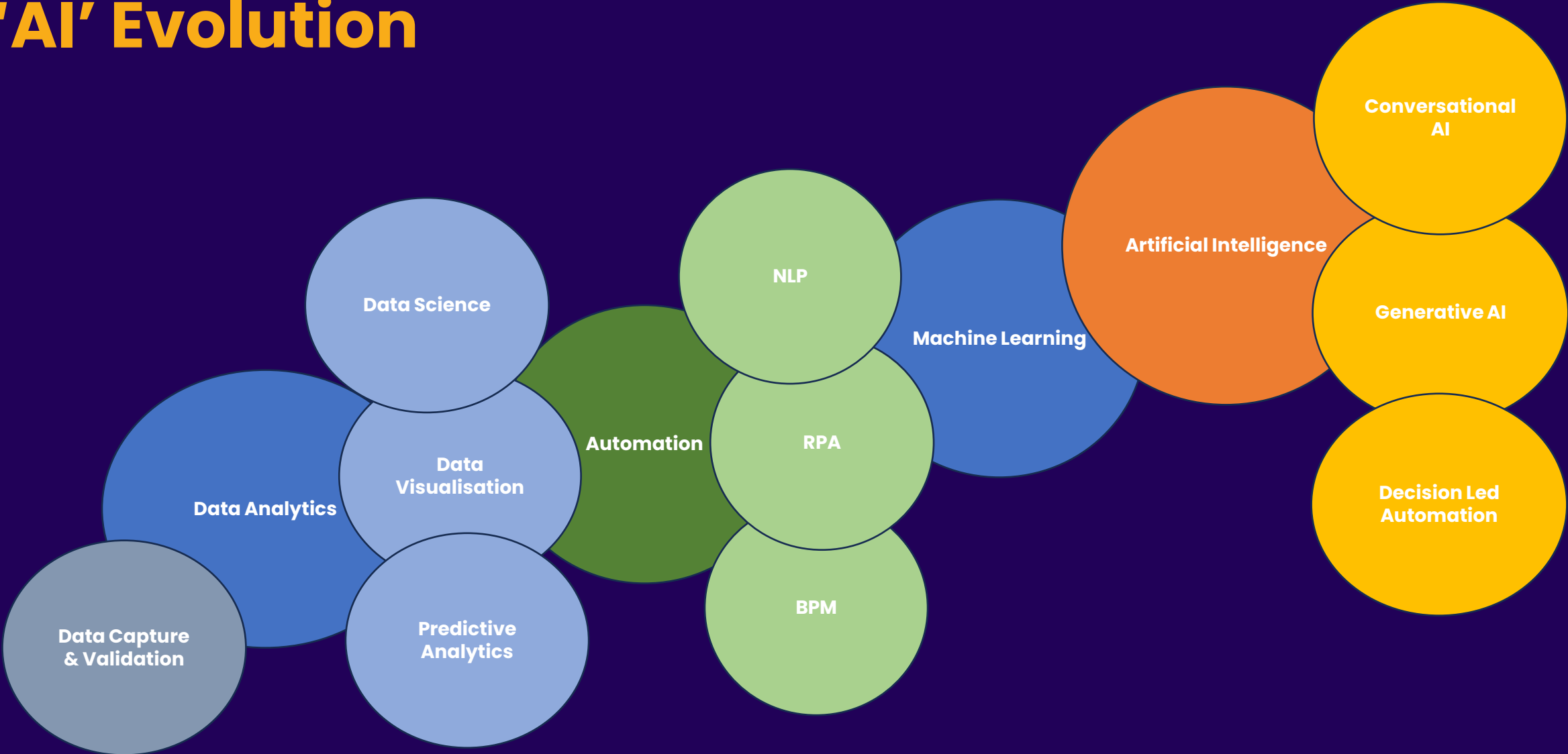
Where is your organisation on this journey and do you agree that this is the journey?

When is AI not AI?

Not everything labelled AI is either new or in fact AI "Don't believe the Hype" ...



'AI' Evolution





Demonstration

MS Copilot / Project Shyrka



The Business of AI

Use Case, ROI, Iteration & Improvement



Target Specific Use Cases

Our client experience is that the more targeted and specific the use case the better chance you have of positive results and rapid ROI.

- **Leverage** existing data and institutional knowledge. Apply and exploit your organisational IP.
- **Accelerate** and inform internal processing and functions such as case management, compliance and HR
- **Support** reasoning and qualification such as pre-screening or post-screening for QA. Augmenting and assuring the expertise within your organisation.
- **Analyse** and compare previous cases or other critical documentation using natural language
- **Automate** internal and/or external communication

Applied AI Innovation

The acceleration and proliferation of AI requires your organisations to be:

- **Informed** – to understand the impact and potential of AI on you and your clients
- **Prepared** – to safely, securely and appropriately exploit the potential of AI
- **Responsive** – to the changing market dynamics driven by accelerated AI proliferation

“Diffusion of this generation of technology is massively fast as the rails were already laid out by cloud adoption such as data and workloads being already fully or partially in the cloud.”

Satya Nadella – CEO Microsoft – Envision London Nov 23



Preparation for AI

Getting your house in order....

Control of AI adoption and usage

In the same way you will already have controls in place for user and data access any AI tooling needs to respect and adhere to these controls.

- **Who:** Who within your organisation should have access to AI tooling?
- **Which:** What AI tooling is appropriate for which users, teams or functions?
- **What:** What data or data sources should this AI have access to?
- **How:** How does your AI tooling honour organisational boundaries?
- **Quantify:** How do you measure the impact of AI on your business?
- **When:** When is the right time to adopt AI?

The Importance of Data

Targeting any AI at poorly structured or managed internal sources* risks at best a poor output and at worst damaging hallucination.

- **Accurate:** How important to your use case is accuracy?
- **Legitimate:** Is this data that you should have access to?
- **Reliable:** Is this data consistently available if built into a business process?
- **Timely:** Is the data current or timely enough for the use case purpose?
- **Complete:** Is the data source complete for the use case or completed by the alignment of additional data sources?

Garbage in garbage out

“One rule has not changed; no system can be more intelligent than the data it sits over. You’ll just end up making incorrect decisions with more confidence.”

Judson Althoff – EVP, Chief Commercial Officer Microsoft – Envision London Nov 23



Business Change

AI has the potential to not just help you do business but fundamentally change how you do business. Therefore, it needs to be looked at through a business lens and not just a technical enablement lens.

- The importance of a clear Use Case and measurable Business Value
- Quality and Consistency over the long-term
- Measure, review and iterate to maximise benefit and returns
- Resilience and Contingency as AI is used to replace 'human' activity or functions
- Competitiveness and Differentiation, what makes your business 'unique'



Demonstration

Just vanilla? ... Covert or overt AI



Concluding Points

AI in the Legal Sector



AI adoption in the Legal Sector

AI adoption is well underway in the legal sector and investment continues.

- The focus remains on the use of AI to automate/streamline routine tasks centred on back office and compliance activities.
- Text summarisation and analysis is also increasingly being used.
- Text generation is being used cautiously for largely templated/ repetitive client communications.
- Vertically aligned solutions are being developed or are in limited trial. These typically leverage pre-existing large language models.



Sundown 

Thank you

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Expertise and Support

1. Projects and Consultancy:

- Ranging from focused assessment or architecture engagement through to multi-phase delivery programmes spanning the Microsoft platform and solutions.

2. Development Capability:

- Extend and augment native Microsoft capabilities including PowerPlatform, SharePoint and Data & AI.

3. Access to Expertise:

- Fractional Advisory / CTO service (Agnostic / Impartial technical input, assessment and validation)
- Identification of and access to Microsoft funding streams

4. Azure Expert Managed Support Provider

- Full 24/7 365 Helpdesk support and proactive monitoring across your Microsoft estate

Data and AI

1. Data Architecture and Infrastructure

- Design, implementation, optimisation and management of your foundational data infrastructure.

2. AI Enablement:

- Requisite preparation and focused change necessary to safely and securely exploit AI.

3. Machine Learning, Data Visualisation and AI Deployment:

- Targeted development activity focused on the exploitation of data to achieve business goals.

4. Copilot:

- When and where appropriate supporting organisations in their deployment of Microsoft Copilot's including M365 and Security.

more than

LawPact – Manchester

2024

Pricing Strategies in the UK: Non-Contentious and Contentious Law

F rbes
Solicitors

more than law

Introduction

John Pickervance

Head of Commercial

John.Pickervance@forbessolicitors.co.uk

Stephen McArdle

Head of Commercial Litigation

Stephen.McArdle@forbessolicitors.co.uk



Our expectations for the session ...

Objective

- Everyone going away with a better understanding of how we all operate and taking learnings that we can apply to our day to day practices regarding pricing and engaging with clients.

Approach

- The value of this isn't what we say but what we discuss.
- We actively encourage everyone to chip in / interrupt / engage in the session as much as possible.
- We want to know what you know and what you want to know.

Behavioural economics

“a method of economic analysis
that applies psychological
insights into human behaviour to
explain economic decision
making”

Why pricing is important

Client-centric reasoning

- Our pricing strategy is market-driven, client demands in the UK have lead to this
- Listening to the client but not hearing – leads to poor scoping and inaccurate pricing
- Clarity regarding engagement
- Greater pricing certainty & involvement in pricing decisions

Firm-centric reasoning

- Having confidence in your pricing – price is a proxy for quality
- No more ‘race to the bottom ‘ discounting to win work
- Low pricing and willingness to discount may damage your brand
- Increasing client wins and retention rates
- Effect on profit by increasing turnover – no additional overhead
- Technological threats (e.g. AI) – moving with the times
- Minimising write offs & “Let’s speak at the end” approach

What our clients demand of us

Costs & Service Levels

- Transparency – greater pricing certainty and budgetary predictability
- What is the price? Get away from (unexpected) add ons ...
- Choice – want to feel like they choose, even if we steer
- Partnership – a shared approach when it comes to risk
- Accountability – little wiggle room when it comes to going over budget or late on response times
- Payment terms

Non-Contentious Law

- Front loading – THE most important part of the job from my personal perspective
 - Proper understanding
 - Accurate and detailed scoping
 - ‘Wearing the client down’
- Upsell – find out what they need, not what they want
- Give the client options (but with a steer):
 - Estimates – uncapped
 - Fixed fee versioning – what is and isn’t included / turnaround times / bundling
 - Mix and match – loss leader fixed fee leading to hourly rates
- Retainers – becomes more justifiable if sold from the start

Contentious Law

Traditional litigation

- Hourly rates, fixed fees, contingency fees
- Care over cost estimates - second pair of eyes – critical to spend the time at the outset to get this right
- Costs budgeting & Costs recovery at Court

Newer ways of working – prevention is better than cure

- Identifying the client's commercial priority – aim for that
- Manage risk, provide options & different funding options
- Advisory work with other departments pre-action
- Alternative to Court? - ADR / Mediation – fixed fees
- Retainer work – capture the free advice and advise the client early

Retainers

- Creates an easy access client 'portal' for advice
- No scoping issues – getting paid to do this once in place
- Volume pricing – the more you spend the more you save
- Collaboration between departments – cross selling opportunities
- Entrenchment of client relationship – discourages multi-firm use
- Discounted hourly rates BUT not really:
 - Reduced administrative requirements
 - More instructions
 - No time falling through the cracks
 - Captures free advice

Make a change ...

“insanity: doing the same thing
over and over again and
expecting different results”

Albert Einstein

thank you for your time



more than law

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Spring 2024 Conference Takeways

AI Technology

Take the leap! Jump in and start using AI so that the communications it generates for you sound like you!

LawPact member firms are already making products that they made using AI for clients. They are using those products to generate additional revenue. Tools that we use can be customized to streamline or make high volume tasks more efficient.

Firm Leadership

Fire problem clients!

The People-Clients-Profits triangle is important. Keeping that balance in mind in your decision-making is extremely useful.

Focus on profits, not revenues.

Teambuilding and wellness initiatives are not valued by employees.

Say what you see – ask questions based on behavior.

Deal with issues with this analysis – “What is it that you need in order to meet the objectives that we established?”

Yes, decisions can be tough, but firm management will be improved by dealing with the issues.

Explain your mission, vision, and values to new hires.

Forbes Pricing Model

Structure your pricing so that the hourly rate is the least attractive option for the client.

Pay careful attention to the scope of the engagement in your pricing suggestion.

Transition existing clients to the fixed fee pricing model? Some may resist, and perhaps it is all right to transition that client later.

Consider monthly fixed fee retainer arrangements.