Greenfield was practicing law at the Federal Trade Commission when she met creative designer Belser in 1977. “I was making much more money but he was much happier,” she says. After the seminal Bates decision that allowed attorney advertising, they decided to collaborate. “What’s the biggest industry in Washington?” she recalls asking. “Law firms are.” They began to do research among buyers of legal services and discovered a formula that’s become more or less standard parlance: Break the selling stage into “finding lawyers” and “choosing lawyers.”

Greenfield and Belser have been largely responsible for the transformation of the public face of law firms, delivering work that was distinguished and memorable even when all firms wanted to do was dip their toes in the marketing waters. Campaigns such as Orrick’s “big green O” and Womble Carlyle’s “bulldog” are instantly recognizable, and the “Find Kentucky” campaign for Stites and Harbison was a favorite. “Lawyers are raised to follow precedent and be discreet. Marketers want to be first and say everything,” says Belser. “We helped them understand the science, then helped them find the courage.”

Grenfield/Belser just finished a new survey about the relevance of brand to a law firm, which shows that firms value brand, but strategy is swinging away from marketing and towards business development. “In a highly competitive environment, business development cannot work without marketing and vice versa.”
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Dear Readers,

This year the publishing arm of The National Law Journal is recognizing the inaugural list of people who have truly “moved the needle” in facilitating the changing ways that law firms conduct business. Whether it be technological developments, operational efficiencies, marketing & business development breakthroughs, or research – we think this list embodies the spirit that will shepherd and shape modern law firms as a business going into 2014 and beyond.

While we realize that there are hundreds who could be acknowledged for their contributions towards transforming the law firm business model, however, for the most part, this year’s selection of honorees have been limited to those outside the actual practice of law. We’ve narrowed the field into four distinct categories: Connectors, Communicators, Strategists & Drivers, and Technologists. Legal Business Trailblazers & Pioneers catalogs the extraordinary accomplishments of these groundbreaking thinkers – we sincerely hope you enjoy this special section, and look forward to compiling next year’s list!

Congratulations again to this year’s honorees.

All the best,

Kenneth A. Gary, J.D.
Publisher, The National Law Journal & Legal Times
Burkey Belser & Donna Greenfield
Greenfield/Belser Ltd.

PIONEER SPIRIT Greenfield was practicing law at the Federal Trade Commission when she met creative designer Belser in 1977. “I was making much more money but he was much happier,” she says. After the seminal Bates decision that allowed attorney advertising, they decided to collaborate. “What’s the biggest industry in Washington?” she recalls asking. “Law firms are.” They began to do research among buyers of legal services and discovered a formula that’s become more or less standard parlance: Break the selling stage into “finding lawyers” and “choosing lawyers.”

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Mark Greene
Waller Lansden Dortch & Davis, LLP

PIONEER SPIRIT Undergraduate studies in engineering and a Master’s on Aristotle’s theories of rhetoric led to Greene to a Ph.D in market research. His first position out of grad school was with Warner Communications and included research supporting the launch of MTV and Nickelodeon. In 1985, he became VP Market Research at a marketing agency focused exclusively on professional services firms and then in 2002 he co-founded The Brand Research Company, which brought the best practices of the international corporations he had been working with to Biglaw. Since 2004, Greene has led marketing teams inside law firms including his current position as chief business development officer at Waller.

TRAILS BLAZED “Lawyers respect evidence, so they are comfortable with marketing based on solid research. This whole idea is fairly recent to the legal industry however. I see parallels to my grandfather the circuit preacher trying to spread ‘The Word.’ Today, most firms are doing some sort of client surveys and market studies based on techniques Greene first brought to the industry almost 30 years ago.

FUTURE EXPLORATIONS Greene expects to see more metrics as the legal industry continues its evolution from a profession to a business. “There used to be so much demand for corporate legal services that you could be sloppy business-wise and still be profitable with happy clients. But this has fundamentally changed.” Greene believes U.S. law firms will continue to learn from the corporate world and from the U.K’s “Magic Circle” firms, whose business practices have traditionally led the U.S. by a few years.
PIONEER SPIRIT After the Bates decision in 1977, the first wave of lawyer advertising was consumer-based and low cost. Around 1990 firms started marketing and advertising and there was a real need to understand what their obligations were. Hornsby staffed the ABA Commission of Advertising from 1990 until its sunset in 2002. That gave him the opportunity to study the advertising guidelines and rules on a national basis and serve as a clearinghouse of information for firms nationwide.

TRAILS BLAZED Hornsby has helped hundreds of firms advertise properly through his outreach, primarily through bar associations and collateral organizations such as the Legal Marketing Association. More recently, he’s been focusing on email and internet use. “We’ve always had technology at the speed of a sprinter and marketing at the speed of a marathon runner, with policy crawling behind.” As part of his outreach efforts, in 2000, Hornsby wrote the seminal book on the topic, *Marketing and Legal Ethics*.

FUTURE EXPLORATIONS Hornsby sees a more exciting future in terms of delivery models than straight-up advertising. “There will be a lot of internet based models for providing services. This was a big part of the ABA’s Commission on Ethics 2020 initiative.” Things in technology move quickly and there is always a challenge in determining how current rules apply to new models. “We will have to decide quickly how to position internet-based in formation to create better access.”

PIONEER SPIRIT Before working with professional services and venture capital firms for 15 years, And after working with a number of law firms to build business development plans, he joined DLA Piper in 2005. The firm had just merged and recruited him to build out its national venture pipeline business unit, which advised early-stage growth companies on their funding proposition and go-to-market strategies, and introduced them to potential investors.

TRAILS BLAZED DLA’s vision is to be the world’s biggest business law firm and one strategy is to institutionalize cross selling across the entire platform. In 2012, Hurley became chief business development officer as part of that vision. Hurley is building a traditional (more corporate) sales culture in a non-traditional environment. “Lawyers are not built to sell, but we are trying to make this the DNA of DLA. We are messaging that we are legal entrepreneurs and the platform for our clients’ success. That means thinking like a true business, operating like a true business and positioning for long run.”

FUTURE EXPLORATIONS The sales function in law firms in its infancy and acceptance is not universal, but the culture has taken hold at DLA and there also have been fits and starts elsewhere. As law firms head down the maturity model, more firms will be hiring “outbound sales” professionals. “A lot are trying and the ones that get it right will do really well.”
COMMUNICATORS

Deborah McMurray

PIONEER SPIRIT After a career as a classical flautist, a variety of career moves brought McMurray to concentrate on advertising and PR in professional services in the mid 1980s. “I quickly got hooked on working with lawyers. It’s challenging, but they are a group of exacting, demanding, brilliant and almost always nice people.” After stints in house at Texas’ Johnson & Swanson and Hughes & Luce, McMurray started her consultancy in 1998 and wrote the book, The Lawyers Guide to Marketing on the Internet, in 2002. In 2006, she started Content Pilot to combine strategy, design and technology “as a three-legged stool, each with equal weight.”

TRAILS BLAZED While half of Content Pilot’s current business is around web design, strategy, and content creation, the company is also the industry leader in proposal automation and experience management tools. “Experience Management is the most strategic issue for firms today. What gets a firm hired over another it is for what they’ve done, for whom and how.” Their tool, Deals & Cases, helps firms manage and cross-reference all that data. “If you can’t articulate what you’ve done you can’t get new work.”

FUTURE EXPLORATIONS McMurray says that proposal activity has quadrupled in law firms since the economic downturn, but staffing to manage them has not grown. “Firms are scrambling with hundreds of proposals each year; they have no time to think.” She believes firms that automate the process, allowing for strategy discussions, will differentiate. “That’s where we’ll be.”

Erin Meszaros

Sutherland Asbill & Brennan LLP

PIONEER SPIRIT After college, Meszaros held a series of legal-related jobs as a legal secretary and paralegal before interviewing for a new position as a marketing coordinator at a satellite office of Lord Bissell (now Locke & Lord). She ended up doing much more than simply marketing, including stints in recruiting and HR. “By the time I left Lord Bissell, I had had basically every job in the firm except attorney.”

TRAILS BLAZED In 2005, Meszaros moved to Powell Goldstein, as director of marketing. After the firm’s merger with Bryan Cave, she became CMO at Burr & Foreman, where she led client interview efforts that have generated more than $4 million in revenue for the firm. Working directly with firm’s chairman, Lee Thurston, “we secured relationships and drove revenue growth.” In late 2013, she moved to Sutherland Asbill.

FUTURE EXPLORATIONS Meszaros notes the trend that CMOs are being relied on as an executive on the team rather than simply for marketing and at Burr & Forman, she became involved in recruitment, setting rates, working with procurement officers and more. Larger marketing teams—staffed with people with specialties such as analytics, technology and public relations—free the CMO up to work more on the business. “CMOs have more of an in-depth role than ever before.”
SALLY SCHMIDT
Schmidt Marketing, Inc.

PIONEER SPIRIT Schmidt was finishing her M.B.A. at the University of Minnesota in 1984 when she responded to a classified ad for a job in “professional services marketing,” which turned out to be at a law firm. “They interviewed me because my resume said I had worked at MacNeil and Purnell. It was a department store but they thought it was a law firm.” After sharing a laugh, she impressed the firm enough to hire her as its first marketer. She soon found out that she was only the third person in the U.S. hired to do law firm marketing. By 1985, there were a few others and they formed the Legal Marketing Association, with Schmidt as the first president.

TRAILS BLAZED She formed Schmidt Marketing in 1987 after receiving 12 job offers following a presentation at an American Lawyer Managing Partner Forum in 1987; some of those original clients are still clients today. “I was a teacher before I did this, and that experience has helped. But there have been a lot of good listeners.” Meanwhile, the LMA has grown to more than 3500 and Schmidt’s first book Marketing the Law Firm: Business Development Techniques is still in print after 20 years.

FUTURE EXPLORATIONS Schmidt sees and industry with some things left to do. “Segmentation is just now catching on. I think we’ll see more industry-based boutiques.” She also expects to see more research. “Law firms have been very slow to embrace information collection. We need more data.”

Jill Weber
Leonard, Street and Deinard

PIONEER SPIRIT After stints at Deloitte and two law firms—and at two traditional marketing agencies—Weber landed at Leonard Street in 2003, where she leads both marketing and business development. There she launched Fast Forward®, which delivers revenue growth by working closely with a small group of high-potential shareholders.

TRAILS BLAZED Fast Forward combines individual coaching, group training, client surveying, research tools and clear and measurable financial goals. The program started as a pilot with 20 shareholders. They increased their books of business by a combined $7.5 million over two years. Half of the first class now has sustainable books well over $1 million a year and there have been five more classes since. “It’s about sustainability and creating a mindset; not just about creating revenue now. We continue to measure every year.” Fast Forward has been packaged and sold to six law firms.

FUTURE EXPLORATIONS Weber sees firms shifting from solving legal problems to helping clients achieve their business objectives, and points out that there are tools, such as news feeds, client interviews and competitive intelligence that support attorneys’ needs to better understand their clients’ business. “Attorneys are starting to ask for a copy of their clients’ strategic plans or their bonus criteria. Client focus will dominate.”

Leonard, Street and Deinard and Stinson Morrison Hecker LLP are merging. The combined firm will operate as Stinson Leonard Street LLP beginning Jan. 1, 2014.
Weintritt started in legal marketing at Greenfield/Belser in the mid-1990s before going in-house at Miles & Stockbridge for more than 10 years. Collaborating with Laura Meherg, then at Atlanta’s Burr & Forman, Weintritt implemented one of the first meaningful in-house client feedback programs. In 2012, she joined Meherg at Wicker Park Group.

Weintritt did 25-35 client interviews each year while at Miles & Stockbridge, and interviewed more than 100 different general counsel during her tenure there. “Lawyers are often focused on the ‘now’ and they take a long time to change course. Client feedback is powerful because it can be the driver of new strategies. No one can argue with voice of client. It’s a very good way to unite people and get them marching down a path.”

Weintritt expects that firms who embrace change will succeed and those who fight it will be left behind. Firms will be able to take much greater care of their current clients by servicing them more thoughtfully and partnering in new ways. “You can’t run a $100-$200- or $500 million dollar businesses without believing they it is a business first. And businesses understand how valuable it is to have satisfied clients. So much effort is spent to gain new clients, but the care and feeding of current ones is critical.”
**PIONEER SPIRIT**

Cambria was invited to by Aon’s general counsel Cam Findlay to join the company to manage its legal operations in 2006. Because it was new to both Aon and Cambria, he started talking to others in similar roles. “A lot of us were solving the same problems, just at different places and different times.” In order to better exchange information among legal department operations professionals, Cambria co-founded CLIC—the Chicago Legal Information Consortium—and, in 2007, the Law Department Operations Survey. In December 2013, he reunited with Findlay as _____ at Archer Daniels Midland Company.

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**TRAILS BLAZED**

Cambria has pushed people to think differently about their role and brings to light of innovative ways people are managing corporate legal departments. The LDO Survey continues to grow and remains the best source of quantitative information on law department operations. And CLIC continues to thrive in Chicago, with similar groups having formed in New York, Minneapolis and the West Coast. “I’m proud to see that others have followed what we started here.”

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**FUTURE EXPLORATIONS**

“Law departments are requiring increasing complexity and speed, so the methods and tools used to manage legal operations must continue to evolve.” Cambria also sees the demand for legal operations exceeding the supply of resources, with the marketplace stepping up, with service providers offering a full suite of services on an outsourced basis.
**John Hellerman & Spencer Baretz**

**Hellerman Baretz Communications**

**PIONEER SPIRIT** In the mid-1990s, Hellerman was doing public relations work for a small agency in Chicago with several law firm clients, “but it was old school promotion,” he says. In 1994, one client was Holleb & Coff, who had just hired the former head of the NLRB, and another was the O’Hare Hilton hotel, which was hosting the Major League Baseball strike negotiations. “I heard that the Associated Press reporters were not able to get the current head of the NLRB to comment, and I offered up my client. Their eyes lit up, and I realized that lawyers’ expertise could be of great value to reporters.” A few years later, he partnered with Baretz, who had been a practicing corporate lawyer and legal marketing professional to form Hellerman Baretz Communications.

**TRAILS BLAZED** Baretz and Hellerman have had some influence over how public relations for law has grown; most firms now include it in their strategic plans that their partners must create content and thought leadership. Also, “our clients are directly involved in the most important issues of our times, and we are only one step away,” says Baretz.

**FUTURE EXPLORATIONS** Baretz sees more law firms and partners embracing marketing because the environment will necessitate it. “Demand is changing and competition is fierce,” he says. “The general counsel’s office has matured as well. The marketing to them has to be elegant and thoughtful and valuable in ways that it has never been before.”

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**Jay Jaffe**

**Jaffe PR**

1943-2012

**PIONEER SPIRIT** Jaffe founded Jaffe Associates, now known as Jaffe PR, and was on the cutting edge for 30 years. The agency has guided lawyers in changing the conservative, traditional ways they communicate with clients and the market. His clients included many of the largest leading firms, as well as smaller boutique firms and legal associations.

**TRAILS BLAZED** In the wake of the Bates decision allowing law firms to proactively market for the first time, Jaffe saw the changing resourcefulness of technology and launched the first virtual legal marketing and PR firm which offered the industry an efficient, agile national legal PR service. Small Business Computing magazine once named Jaffe PR one of the “100 Most Tech-Savvy Small Businesses in America.” Jaffe spent much of his career finding the balance between traditional PR and understanding how technology was changing it. Even more importantly, he helped firms answer the seminal questions: “How much should law firms spend on marketing, how can firms get lawyers to take reputation management seriously and how do you measure ROI?”

**FUTURE EXPLORATIONS** The agency Jaffe founded has continued to thrive since his passing last year, and it is clear his impact there lives on. On its website it says, “[Jay’s] kind of uncommon common sense is what made Jay the leader of the Jaffe team, and is what will continue to fuel all of our efforts on behalf of the legal community and Jaffe PR. We think his perspectives on life, relationships, work and the world also continue to resonate.”

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As we were contemplating the NLJ 50 Business of Law Trailblazers & Pioneers, it seems that every time we explained the idea, we got the same reaction: “Oh, you mean people like Jay Jaffe.” As someone who was frequently introduced as “the man who invented law firm marketing,” we are proud to honor Jay Jaffe in memoriam.
Communicators

PIONEER SPIRIT Mestel formed Mestel & Co., a permanent legal placement provider, in 1987 and at the request of a client, established Hire Counsel in 1993 to provide temporary staffing in 1993. She leveraged corporate experience gained working for A. G. Lafley and his team at Proctor & Gamble to compete with well-entrenched providers. “So much of my strategy to build one unified company is based upon P&G’s strategy. They were great marketers. They stood behind first-class products. They always foster teamwork. When everyone does a good job there’s a good job for everyone.” The company now has 22 office locations and interview facilities.

TRAILS BLAZED In 2011, Mestel formed an ESOP and sold 100% of the company’s stock to its employees. Both full-time employees and any temporary employee who works more than 1000 hours per year have the opportunity to participate. As of December 31, 2012, there are 721 employees with a vested stock balance of which 654 are temporary employees. “It’s a great motivator that benefits our clients because the best people want to keep working with us.”

FUTURE EXPLORATIONS With the legal business changing rapidly, Mestel expects many more mergers, which cause spinoffs and more lateral partner moves. Associates, however, will find it more difficult to move as their leverage declines due to the growth of contract attorneys performing high legal work. “The industry will continue to be in flux while firms figure out how to react to clients’ rate pressures with declining revenues.”

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Bob Major and Marty Africa

Major Lindsay & Africa

PIONEER SPIRIT Major was disillusioned and ready to quit practicing law when he read a magazine article on legal recruiters; five days later he started what became Major Lindsay & Africa out of his San Francisco apartment. Meanwhile, Africa was career services director at Boalt Hall School of Law. She asked Major’s firm to put on a program to educate the students about legal search, so they’d understand it when they made lateral moves. Not much later, she herself joined up. “I moved over from being a career services director for a law school, to being like one for the entire legal profession.”

TRAILS BLAZED The firm quickly went from San Francisco-based to national, as law firms that had interviewed at Boalt Hall became clients. “Big east coast firms were calling. Every city was represented,” says Major. Legal search had historically been a smaller, local business, but the firm was able to grow nationally, opening offices in Dallas and Chicago in the late 1980s and Washington, D.C., New York and Atlanta in the early 1990s. After some unexpected departures, they brought on professional management, which led to an aggressive expansion strategy and a highly professional organization.

FUTURE EXPLORATIONS “The legal recruiting landscape has changed due to social media,” says Africa. Major adds that clients are going to not use headhunters if they can accomplish the same goals with social media. “So we’ve got to respond to this very significant challenge, and it will likely come at the expense of our competitors.”

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Lynn Mestel, Esq.

Mestel & Company

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Murray joined a big national real estate firm in 1979 and the first project that came up was at a big law firm, from which he learned about what law firms need and served as a jumping off point for other firms. “Lawyers love precedent.”

Murray started tracking metrics of other firms he’d worked with (and collecting information on firms he hadn’t) and formed one of the first law firm practices—mirroring how firms themselves do business. A tipping point came in the mid-1990s when a big firm hired Murray and his team to plan space for all their locations worldwide. “It was unique at that time, but there was mutual benefit. We didn’t need to reinvent the wheel and can build economies of scale.” Murray has since worked in 16 countries and his current firm, Jones Lang LaSalle, is in 68.

Murray says firms are more often using their offices to make a statement, and it is important to understand how and why and how they “brand” their space. “At the end of the day if you build space that supports their business and also says who they are, it’s pretty powerful.”

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**PIONEER SPIRIT** Nine years into his career with the federal government, Bellis’ wife had to move to New York for work. He had worked with Price Waterhouse on a project and networked and interviewed there, but the only group that was hiring was the law firm services group. After a few years, he became their first consultant working with law departments, and he made partner in 1988 as head of a group focusing on them. After 20 years, he left Pricewaterhouse Coopers for Hildebrandt Consulting, predecessor of HBR.

**TRAILS BLAZED** Over the years, Bellis has helped hundreds of law departments identify, adapt and implement best practices. In 1984 he also developed the leading annual benchmarking survey for Fortune 1000 level companies, which has operated continuously since. He pioneered task-based billing serving as an "honest broker" in developing the original UTBMS codes and also took a leadership role over the first 20 years of the LegalTech conferences. “I’ve always taken a comprehensive approach to law department consulting, including strategic, leadership and management, organization and service delivery models, along with systems and technologies.”

**FUTURE EXPLORATIONS** Bellis thinks the industry is matured; in the 1990s departments went from “a back water” to prominent in the legal services relationship and in the 2000s there was a gradual rise in talent management and sophistication in technology. Today, even firms well outside the Fortune 50 are getting more sophisticated and focusing more on business issues. “We’re a good internal law firm” is now just the beginning for a good law department.

**Christopher Bogart & Jonathan Molot**

**PIONEER SPIRIT** Molot was a Georgetown law professor who has taught in litigation and insurance finance. He noticed that lawyers are willing to advise on risk, but there was market mechanism to relieve that risk, so he formed a company to find funding to mitigate litigation risk that was impacting business deals. In 2009 he met Bogart, who had left law for other businesses, including a small private investment vehicle he built to back some cases a friend was trying to handle. They formed Burford Capital to meet the increasing demand in the law market for third-party capital.

**TRAILS BLAZED** Burford has been through an IPO and follow-on capital raising on the London Stock Exchange and has put hundreds of millions of dollars to work. “Our funding enables clients of any size to get the right lawyer at the right fee arrangement,” says Molot.

**FUTURE EXPLORATIONS** Lawyers and clients had been talking about trying to manage litigation cost and risk, but not much has happened until the last few years. Rising costs and reducing budgets have forced people to look at the new dynamics. “The availability of capital can help lawyers adjust to a new more competitive market,” says Bogart. “Law is just about the biggest untapped capital market around.”
Dan DiPietro
Citi Private Bank

**PIONEER SPIRIT** DiPietro started his career in middle market banking and worked with a handful of law firms. “They were experts in the profession, but law firms were just coming up the curve as an industry. I got to work with the best and the brightest and still contribute something.” Since then he’s spent 25 years working with law firms in a variety of roles at Citi Private Bank, where his group has meaningful relationships with more than 90 of the Amlaw 100 firms and 60-70% of next 200.

**TRAILS BLAZED** Citi started benchmarking as an internal underwriting tool more than 30 years ago. Soon after arriving at Citi, DiPietro was part of the leadership team that decided to share the data; this became Citi’s *Annual Survey of Law Firm Performance*. The survey provides Citi clients with key information, while providing the basis for the bank’s client discussions around industry trends, milestones and performance.

**FUTURE EXPLORATIONS** DiPietro sees an industry that has taken some “body blows” since 2008, but he does see resiliency and determination on the part of firm leaders to chart a course in line with the realities of the market. He expects greater volatility, with “winners and losers.” But, he says, “the future remains bright for the industry because the industry provides services that are valuable in the global environment.”

Ward Bower
Altman Weil, Inc.

**PIONEER SPIRIT** Bower spent a year working at a large consulting group in Boston only because he got out of the army a week too late to start law school. He “got great training,” however, and after law school joined Altman Weil. “I told them I’d stay a year. That was 38 years ago.” Since then he’s facilitated some of the largest law firm mergers in the world.

**TRAILS BLAZED** Thirty years ago Bower ran a strategy retreat with 12-attorney Leeds firm Dibb Lupton & Co, which wanted to evolve into the U.K.’s first “national firm.” (“Even London firms didn’t have offices in the outlying areas at that time.”) It merged with a firm in Sheffield and then with London’s Alsop Wilkinson before renaming itself DLA in 2000. After three years searching for merger partners in the U.S., the firm ended up combining with Piper Rudnick and Gray Cary. Bower’s involvement was over 20 years, developing strategy, attending board meetings and working closely with firm leadership. “This is a classic case of globalization and consolidation in law firms around the world. It’s reflective of what’s happening at the top end of the legal industry today.”

**FUTURE EXPLORATIONS** The Altman Weil Merger Line shows 74 mergers involving U.S. firms already in 2013 (as of 11/19), on pace for the most ever. Bower, however, only expects one or two more truly global firms to emerge. “If you are a 12-attorney firm today, it’s too late to start trying to turn into DLA Piper.”
CITI PRIVATE BANK LAW FIRM GROUP IS PROUD TO HONOR THE


We would like to congratulate Dan DiPietro along with all of this year’s honorees.
Toby Brown
Akin Gump Strauss Hauer & Feld LLP

Pioneer Spirit
Just over 5 years ago, Brown was head of knowledge management at Fulbright & Jaworski. The buzz he kept hearing was "alternative fee arrangements," which he realized would make knowledge management mission critical. He brought this up to the firm and ended up leading a newly formed AFA committee, one of the first. After building that from the ground up, creating strategies for evaluating proposals, processes for approval, and speaking to countless clients, he left to build a similar function at Akin Gump.

Trails Blazed
As one of the first law firm pricing experts, Brown spearheaded the formation of a group of like-minded people. It started with only five people but by October 2013 the more than 200 attended the Client Value SIG's first "P3 Pricing, Practice Innovation and Project Management" conference (in affiliation with the Legal Marketing Association). "There's massive attention being paid because we are the tip of the sword. We are the strike point for change in law firms.

Future Explorations
While Brown spends a lot of time in front of clients and these interactions—as well as ones with partners and other leaders—has changed his thinking. "Profit at a law firm has been misunderstood; actually it hasn’t been given the right thought. Firms have always raised rates and demand still went up. Now they are starting to understand profitability. And there is zero dialogue about going back to how things were; all about how we are going to adapt. I’m excited that’s happened in such short order.”

Bob Dell
Latham & Watkins

Pioneer Spirit
Dell joined Latham in the late 1980s was elected chair of the firm in 1994. At that point, Latham was a U.S. firm with a heavy emphasis on the West Coast. In 1999, the firm committed to a global strategy to push the firm forward. "It clearly was the future, because many of our larger clients were globalizing themselves.”

Trails Blazed
Since 2000, the firm has built a significant platform in Europe, the Middle East and Asia with about a third of its lawyers residing outside the U.S.—not by merger but by adding single attorneys or small groups. "It was important for us to remain one firm, with one culture, with one set of systems and one profit pool.”

Future Explorations
Dell believes that globalization will continue as more and more companies are moving operations and doing business abroad, with capital moving across borders more freely. "Companies that are barely off the ground have a strategy to sell overseas right off the bat." Dell expects, however, that complexity will continue to increase, which is why a culture of collaboration is so important. "Clients now need talented people of all sorts to work together as a team. Our culture of teamwork and collegiality was originally driven for internal reasons, but now it is a competitive advantage.”
**PIONEER SPIRIT** Harris was putting together an invoice as an associate at Davis Polk when he realized the monthly bill was equal to his entire annual salary. “From that point on, I was obsessed with making observations about things that seemed inefficient and wasteful.” In 2000, Harris co-founded Axiom to allow clients to “insource” Axiom attorneys to their own processes and departmental structures, rather than paying traditional law firm overhead.

**TRAILS BLAZED** Harris had been trying to more meaningfully play a role to be more relevant to their clients and transform the industry, and when the economy came to a halt in 2009 there was a much greater sense of urgency around those discussions. The conversations turned into diagnostic exercises, with Axiom and the client jointly developing solutions. “To be truly transformative, one must address the entire work stream end-to-end and change how the work is getting done, not just who is doing it.” Axiom’s managed services allow it to solve for cost without sacrificing risk management, as “all the things you do to systematize to reduce cost also reduce risk.”

**FUTURE EXPLORATIONS** To many, Axiom is now synonymous with the transformation of the legal industry. “Now, there is, and will always be, an elite group of top firms who handle matters so big that price is immaterial. For the rest of the industry, however, disruptive change looms.”

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**PIONEER SPIRIT** After graduating from Rutgers with a business degree, Hildebrandt answered a blind ad that said, “business manager wanted” with a telephone number. It turned out to be for a 50-lawyer firm. “This was before anyone was really managing firms.” He stayed 6 years then moved to a Wall Street firm, while writing a monthly management column for the New York Law Journal and founding the Association of Legal Administrators. He kept getting calls for consulting and in 1977 made it full time.

**TRAILS BLAZED** Hildebrandt brought a sense of professional management to law firms, with clients all over the world. His firm has grown to a global practice and he’s worked on a large number of the mergers over the past 10 years, including the formation of King & Wood Mallesons, the first global firm with Asian roots. “I’ve watched us grow from a cottage industry to one with firms of 4,000 lawyers, some of whom are my clients.”

**FUTURE EXPLORATIONS** Hildebrandt also chairs the annual Legal Executive Briefing conference that brings together 120 of the largest firms, known by some as “the Davos of the legal profession” and sees very challenging times ahead. “The demand for legal services is flat. Globalization has put pressure on firms. Firms need to change pricing and service to meet client needs.”
PIONEER SPIRIT Before the mid-1990s, Kirkpatrick & Lockhart was principally a regional, East Coast law firm. “It became increasingly clear that clients were conducting business differently. The world was their stage. We concluded that we had to align our business with the businesses of our clients if we were to succeed in an era of intense consolidation and globalization,” Kalis led the firm in expanding to the point where it now has approximately 2100 lawyers in 48 offices on five continents.

TRAILS BLAZED Opening an office in New York 20 years ago was a big step for the firm as was a merger with London’s 135-attorney Nicholson Graham & Jones in 2005. These combinations made the firm a more plausible merger partner for Preston Gates & Ellis in 2007, which brought three Asian offices. The global footprint allows the firm to advise on new challenges due to governmental regulation around the world and movement of capital and product across national borders. “We’ve tried to position the firm at the intersection of globalization, regulation and innovation.”

FUTURE EXPLORATIONS Kalis thinks there’s a tendency for people in the grips of inertia to think “we finally got there” but he expects “that past will be prologue, as the profession has more consolidation and globalization to experience before the market finds equilibrium.”

Sally King
AKIN GUMP STRAUSS HAUER & FELD LLP

PIONEER SPIRIT Recruited out of business school by Ben Heinemann to be General Electric’s first non-lawyer manager, King worked under Heineman and Jack Welch and with approximately 475 lawyers in 75 locations, spending much of her time managing outside counsel and outside counsel budgets. “I couldn’t have asked for a better mentor than Ben. GE pushes you to innovate, be creative and develop solutions that fit the time and the problem.”

TRAILS BLAZED King left GE in 1994 to launch Counsel Connect, an online precursor to law.com. From there she went in-house and worked on the mergers that formed Verizon before taking COO jobs at Cooley Godward Kronish and Clifford Chance. She was instrumental in bringing together the combination of SNR Denton, Fraser Miller Casgrain in Canada and Salans to form Dentons and last month became COO at Akin Gump. The common theme has been weaving together diverse, multi-disciplinary teams (including finance, IT, human resources, business development and more) and helping them function at their highest and best level.

FUTURE EXPLORATIONS King expects law firms to be reflective of clients’ needs, with alternative fees, diversity, robust technology, business skills and more willingness to take risks. “Lawyers tend to be extremely skeptical, so it’s often quite difficult to get them to act nimbly. But firms can reengineer themselves to deliver services swiftly and efficiently while still making a profit.”
PIONEER SPIRIT After earning a bachelor’s degree in economics (“Adam Smith was my hero”), MacEwen went to law school and then practiced as a securities lawyer at a big New York firm and in-house at Morgan Stanley Dean Witter. As he practiced he got more interested in management, but found a dearth of information online addressing the economics of law firms with sophistication. He launched the Adam Smith, Esq., which now includes more than 1500 articles.

TRAILS BLAZED The online publication is helping create the framework for how people think about the industry. “It’s no longer taboo to talk about the industry and it’s economics.” MacEwen also provides consulting services and in 2013 wrote his first book, Growth is Dead, Now What?

FUTURE EXPLORATIONS The message of Growth is Dead is that firms are now almost exclusively in a battle for market share. “The ‘rising tide that lifts all boats’ is what’s dead.” MacEwen also sees firms like Axiom as really robust vibrant powerful substitutes for the classic BigLaw model. “Never in a million years did I imagine that the legal industry would become a fascinating one. It’s a very exciting time.”

David Maister

PIONEER SPIRIT Maister started studying the professional services industry while on the faculty at Harvard Business School and by 1985 he found himself in enough demand to form his own consulting business. While much of his work has been with reference to law firms, he has always been conscious to write more broadly, as lawyers can learn from other professions. “Lawyers tend to readily come to agreements in principle, then execute badly. It’s not about intelligence; it’s about the governance structure. The professional training of lawyers is to find the flaw in any argument. That makes it hard to build consensus. Law firms have made fewer changes and less progress than other professions.”

TRAILS BLAZED Maister’s 1993 book, Managing the Professional Services Firm is still treated as a primary text on a broad range of issues and The Trusted Advisor sold even more. Most recently, Strategy and The Fat Smoker is about building the determination, resolve and discipline to succeed in the long term.

FUTURE EXPLORATIONS Firms have survived a lot, but markets are forcing change. But “anyone one who’s going to predict a major revolution has history against them. The model hasn’t changed and will continue to change very slowly.”
Richard Rosenbaum  
Greenberg Traurig, LLP

PIioneer Spirit  
Rosenbaum has been at Greenberg Traurig since 1985, when the firm had 90 lawyers in two offices in South Florida; now they have about 1,750 in 36 locations worldwide. “The firm was really the first to bring a combination of ethnic diversity, hard work and high quality to the South Florida market.” Through the 1990s, the firm grew throughout Florida and across the U.S. and, more recently around the world. “This was done very carefully, with a great deal of discipline. Rather than doing mergers or vereins, we’ve always been one firm.”

TRails Blazed  
Rosenbaum worked closely through the 1990s and 2000s with former CEOs Larry Hoffman and Cesar Alvarez before becoming CEO himself. “We always understood that culture was important: the value system, respect, empowerment, trust and collaboration of the partners towards each other.” The firm’s closed compensation system has also been critical to its success. “It has helped avoid internal competition and allows us to pay people on a merit basis and in a fair manner that avoids politics and other obstacles to collaboration.”

FUTURE EXPLORATIONS  
Today’s clients want very high quality, but also a greater focus on a reasonable cost and value. The firm is focusing on taking its one-of-a-kind network of 36 offices and using that unique delivery system to collaborate in order to deliver value. “That’s what clients want and there are limited firms that can deliver it. That’s what our growth is going to be about.”

David Perla & Sanjay Kamlani  
1991 Ventures

PIioneer Spirit  
A few years after meeting while in law school together at Penn, Perla was general counsel of Monster.com and Kamlani had cofounded Office Tiger, which provided back office work for law firms. They asked themselves whether a similar model to Office Tiger’s could be used to do legal work. After meeting with enough lawyers in India, it seemed possible and they formed Pangea3. Says Perla, “The answer was a combination of legal and HR enabled by technology.”

TRails Blazed  
Pangea3 brought a degree of change into the US legal market, spurring a trend of technology-enabled providers that are proving that legal work can be done differently, by different types of people, and in different places. “We also had a major impact on the legal industry in India, where law is now more of a business and lawyers are more likely to advance based on merit,” says Kamlani. By they time Kamlani and Perla left in 2012, Pangea3 had employed more than 3,000 different people.

FUTURE EXPLORATIONS  
Perla and Kamlani see the legal industry starting to resemble a “normal” industry, rather than a guild or profession. “Look at the venture communities, you will see hundreds of companies that are trying to tackle legal,” says Perla. “Many will fail, but some will not. It’s a renaissance in legal entrepreneurship.”
Quality and value are not mutually exclusive.

Enough with the arrogance. Enough with your law firm setting the agenda. At Greenberg Traurig, we’re leading the charge into a new legal reality: one firm that delivers quality counsel, elite practices and value. Because there’s simply no reason your business shouldn’t expect legal excellence and efficiency.

We congratulate our Chief Executive Officer, Richard A. Rosenbaum, for being named one of the 50 inaugural NLJ Trailblazers & Pioneers, continuing the Greenberg Traurig tradition of having the courage and vision to find opportunities in change and new ways to deliver value to our clients.
**PIONEER SPIRIT** As an associate at Skadden, Vasudevan starting thinking about whether the work he was doing managing M&A projects could be done more effectively. He had gone to law school in India, but has an M.B.A. from Cornell and a Masters in Laws from Columbia, so he was exposed to both the American and Indian legal systems. Believing that the right lawyers in India with the right training, could do the work at higher quality levels than young associates at the U.S. and U.K., he launched QuisLex in 2004. “It was not a tested concept, but we did not question that it would work.”

**TRAILS BLAZED** Vasudevan believes that QuisLex delivers better quality because there is a career path for employees and a focus on process. The company’s ninth employee was a Six Sigma Black Belt and the firm leverages statistics and other analytical tools every day. “Focusing solely on finding better people can only provide an incremental return. The way to get big returns is by improving the overall systems.” QuisLex now employs more than 700 people and “we can do more than 20 times the work we could when we had 100.” The company has consistently helped clients in “bet-the-company” litigation and investigations and strategic M&A. “It’s not easy to get those projects and it’s due to the trust we’ve established.”

**FUTURE EXPLORATIONS** Vasudevan sees the explosion of data in litigation and regulatory matters and believes that “any company that can help companies get to the result in the most cost-effective manner with good quality will do well.”
PIONEER SPIRIT
As a law student in 1981 in Scotland, emergence of the personal
computer convinced Susskind that technology would have a radical impact on law. He ended
up at Oxford for a Ph.D. in Artificial Intelligence in Law and then at Ernst & Young for three years
he’s had a “portfolio career,” advising corporations, law firms and government agencies while
speaking and writing.

TRAILS BLAZED
Susskind’s subject matter has always covered the justice system
and how it can be modernized by technology, but it’s evolved to focus more on strategy, espe-
cially in the U.K., where the Legal Services Act has changed things. “My mission is not just about
the justice system, it’s also about better service for clients and ease for consumers.” The impact
is worldwide. “Law may have differences by jurisdiction, but the business problems are similar.”

FUTURE EXPLORATIONS
Susskind expects to see more change in the
next two decades than we’ve seen in the past two centuries. “It’s not a big bang revolution, it’s
incremental. The traditional business model—broad-based pyramid, hourly billing, expensive
buildings, highly bespoke offerings—all will be challenged.” His next book, coauthored
with his son, will be called *Beyond the Professions*, where he will extend his theories across
different professions and question whether professional services will even be delivered through
the professional firms.

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Tony Williams
Jomati Consultants LLP

PIONEER SPIRIT
Williams spent about 20 years at Clifford Chance, including stints
in Hong Kong and Moscow and then as the firm’s managing partner. He left to form Andersen
Legal, which was shuttered along with the rest of the firm after the Enron scandal. “I was always
more interested in law as a business rather than black letter law.” He started his consulting firm
only a few months later.

TRAILS BLAZED
Williams has positioned Jomati into a leading position in
cross-border mergers and acquisitions and he has advised on more cross-border combinations
than anyone else. He’s worked on many high profile transactions, including Hogan Lovells,
Squire Hammond and Deacons Norton Rose. “It’s been absolutely fascinating to be in the center
of it as firms are figuring out how to stay relevant to clients while remaining sustainable.” In
2012, the firm received a Queen’s Award for Enterprise in International Trade.

FUTURE EXPLORATIONS
Williams thinks we are in a fascinating period. By
the end of 2013, 30 firms with will have revenue of over $1 billion. Williams thinks we’ll see $5
billion law firms in the next 5-6 years and maybe $10 billion firms in 10-15 years. Meanwhile,
“globalization has accelerated due to downturn and even midsized firms are seeking profitable
markets.”
Jay Zimmerman
Bingham McCutchen LLP

PIioneer Spirit Zimmerman was elected chairman of Bingham, Dana & Gould in 1994, in the wake of that decade’s banking crisis. About a third of the firm’s revenue was from Bank of Boston, and it didn’t seem the bank would remain independent much longer. Zimmerman has led the firm to diversify in terms of clients, practices and geography. “I was fortunate to be able to build a consensus to set out on a new course.”

Trails Blazed They started by merging with international firm Marks & Murase and opening a New York office in 1997 and then got a lucky break when Bank of Boston remained independent for years before ultimately merging with Fleet Financial Group. After a series of combinations with smaller firms, the firm merged with McCutchen Doyle in 2002, which amplified both growth and diversity. The firm has been on Fortune magazine’s “Best 100 Best Companies to Work For list” each of the last nine years. “That’s not easy for a firm that has grown as fast as we have.”

Future Explorations Zimmerman says that the pace of change over the past five or six years is unlike anything seen before. “Most attribute it to the events of 2008, but a lot of what we’re seeing is actually the result of technology and the flow of information.” He adds that the industry remains in the midst of some radical changes. “We need to continue to deliver quality, but we also need to be better business people because clients expect firms to also be efficient.”

Peter Zeughauser
Zeughauser Group, LLC

PIioneer Spirit Zeughauser was perhaps the first general counsel to leave practice and use that perspective to advise law firms on growing their businesses, forming Zeughauser Group in 1995. “I focused on Biglaw, because that’s where the greatest need was.” Zeughauser was also an early board member of the Association of Corporate Counsel and as ACC’s Vice-Chair in 1989 he authored its first strategic plan, which included “Goal 5” to promote diversity in the in-house bar.

Trails Blazed At Irvine Company, Zeughauser was also one of the first GC’s to use an RFP process to buy legal services from big firms and also sparked the alternative fee arrangement movement with his 1985 article, “The Rapid Demise of the Billable Hour.” In 2007, Zeughauser advised on the merger of Chinese law firm Yuan Da with McDermott Will & Emery, the first between Chinese and American firms.

Future Explorations Zeughauser sees the influence of the Am Law 100 waning and being replaced by a “Global 25” group of international firms that will “dominate international legal practice.” This list will be a robust group of mega-international law firms, with a number being Chinese-focused. “The Chinese will have a significant role on the world legal stage. Starting now.”
PIioneer Spirit

An electronic engineer by training, Adkins did his masters thesis in Wordperfect 5.0, which made him valuable to law firms. In 1997, he launched the Legal Technology Institute at the University of Florida Levin College of Law and folded in his consulting practice in to fund its programs at the law school. In 2010, he retired from the law school and started as CIO at Steptoe & Johnson in Bridgeport, W.V.

TRails Blazed

The Legal Technology Institute was the first entity of its kind and it developed a number of national studies on legal technology, starting in 1999 with The Internet Lawyer. Later topics included ASPs, in-house counsel and knowledge management. “These were all national studies that checked the industry’s pulse and set the baselines.” Adkins was also chair of ABA Techshow for two years and co-chair of LegalTech for 8 years.

Future Explorations

Adkins sees the world going mobile, with eventually even small and mid-size firms landing in the Cloud. He also expects better integration. “It doesn’t make sense to enter the same information multiple times in different places.” He also expects firms, pushed by the likes of Apple and Google, to adopt more advanced technologies. “Take integrated voice recognition technology, for example. You don’t have to make it work. It’s already there.”

Lou Andreozzi

Bloomberg Law

PIioneer Spirit

Andreozzi was general counsel for Reed Elsevier when they bought LexisNexis 1994. As the company grew, Andreozzi moved to the business-side—first at Martindale Hubbell, then Lawyers.com and ultimately as CEO of LexisNexis North America. “Using these products as a lawyer gave me the practical understanding to make the move.” In 2010, Andreozzi joined Bloomberg Law, Bloomberg’s new web-based legal research system, as chairman.

TRails Blazed

At Martindale, Andreozzi launched lawyers.com at a time when print directories were being disintermediated by the Internet. “Spending $50,000 for the URL raised eyebrows in 1998.” At Bloomberg Law, he worked to change the legal information industry with a product that gave subscribers unlimited, unrestricted access to the information in the system, including legal content, company information, dockets, news and a proprietary citator. Bloomberg Law formally launched in 2010. In September 2011, Bloomberg acquired BNA, the largest independent publisher of news, analysis, and reference products for professionals, which helped propel Bloomberg’s expansion. “The combination of Bloomberg assets, Bloomberg news and BNA secondary materials is hard to beat.”

FUTURE EXPLORATIONS

Bloomberg Law plans to continue to add content and functionality to help practitioners navigate the huge amount of information available and draw new insights. “The industry is moving into a new phase and the successful businesses will be the ones that can unlock the value of all the information out there.”
Neel Araujo
HP Autonomy

PIONEER SPIRIT Araujo was still in graduate school in 1995 when he and classmate Rafiq Mohammadi looked at the document management market and found it to be underserved. “The customers were not happy; they used the existing products because that’s all they had.” The Internet was just emerging, along with object oriented programming and SQL, allowing them to form iManage and build a product that was faster and faster and better. Some early resellers led them to the legal market. Araujo sold iManage in 2003 and has stayed with the business as it has moved from Interwoven to Autonomy to HP.

TRAILS BLAZED The market has evolved significantly, as have the business problems. There are many more emails than documents and the volume of information is much bigger, by a factor of more than 100. And the types of information have increased, now including audio, video, IM and more. “What that means is that the technology has to move to manage that velocity and volume; at least one law firm is now using our tools to manage more than a billion objects.”

FUTURE EXPLORATIONS Araujo thinks the next big drivers are mobility and collaboration. “More and more, attorneys want to work from anywhere on any device. We need to enable firms and law departments to work far more seamlessly and effectively than ever before.”

Tom Baldwin
Reed Smith LLP

PIONEER SPIRIT Needing hours for his campus job at USC, Baldwin took a job at a recent alumnus’ case management company. That gave him a nice holistic perspective to law firm technology and management, which helped him to link the practice to the business of law and where technology fits. After a stint as a consultant, he landed as chief knowledge officer at Sheppard Mullin in 2004 before moving to Reed Smith in 2008.

TRAILS BLAZED Throughout his career, Baldwin has always built teams that were aligned more with the business challenges than with the legal practice, always leveraging technology, methods and process to innovate. “It’s about the business more than the technology. The key is trying to achieve the strategic goals and bridge to the market challenge.”

FUTURE EXPLORATIONS Baldwin thinks we are seeing a real shift in the psyche of how law firms get business, with innovative firms are taking a lot of market share from firms that are not willing to live the “new normal.” “Firms can either put their head in the sand and hope for a market correction or get out in front of it. That’s what we’ve tried to do.” Baldwin is also seeing a new wave of convergence, with many corporations trying to get to less than 20 firms. “It’s a byproduct of pricing and predictability needs. They can exert more pressure.”
PIONEER SPIRIT  In 2002, the CIO at Morrison & Foerster came to the conclusion that she wanted a lawyer to run knowledge management. Benamram, then a securities litigator at the firm, raised his hand and came with some plans. “I told the firm ‘we need three years, five people and $100,000.’ They said, ‘You’ve got three years.’ This drove him to a vendor-based process and they collaborated with Recommind to build AnswerBase (later known as Decisive Search). “We ended up better off.” Benamram built MoFo’s knowledge management function around the concept that, “the product we are selling is a matter, not a document. Let’s revolve this around our product, not the artifacts that inform the product.”

TRAILS BLAZED At both MoFo and, since 2008, White and Case, Benamram was able to establish a knowledge department from whole cloth and the partners have invested in order to better serve clients. “At White and Case, we have a staff of 175 people and that’s expensive.” Both firms have been more profitable because of the investment. “Clients come to big firms because they assume that lawyers have access to each others’ knowledge. By adding infrastructure and changing culture, clients get better service.”

FUTURE EXPLORATIONS Benamram thinks the next frontier is using all the data to alert lawyers on what they need to know without asking. “Collaboration driven by facts is the future.”

PIONEER SPIRIT Donlinksy was a consultant for Price Waterhouse in the mid-1970s and was asked work with a law firm on developing an automated time-and-billing system. He continued to work on law firm technology, including first-generation word processing tools, before becoming CIO at Howrey & Simon in 1990. After about five years, he went back into consulting to work almost exclusively on practice- and client-facing technology and finally moved to Sutherland as CIO in 2011. We are focusing on “making technology available anytime and anywhere, since people work anytime and anywhere.”

TRAILS BLAZED Dolinsky is focused on getting technology in the hands of the attorneys so they can be mobile, client facing and collaborative. “We have tried to add practice-focused, tools to make it happen easily and reliably for our attorneys.”

FUTURE EXPLORATIONS Dolinsky expects to see more focus on anytime, anywhere service delivery and legal project management supported by technology in order to help clients collaborate better and manage matters and tasks. He also sees less investment in brick and mortar and more cloud computing. “Sutherland, like many other firms, is very focused on making the best technology investment we can to support client delivery and service excellence. Any firm interested in doing that is a good place to be.”
Laura Kibbe
Epiq Systems, Inc.

**PIONEER SPIRIT** As in-house counsel at Texaco, Kibbe gained a lot of experience doing discovery work. She brought that experience to Kaye Scholer, where she was so effective managing discovery for Pfizer’s Rezulin and Lipitor litigation that she was asked to do so on cases where the firm wasn’t otherwise involved. In 2004, Pfizer’s then associate general counsel and head of litigation Allen Waxman convinced her to come in-house, where she built one of the first state-of-the-art in-house discovery operations.

**TRAILS BLAZED** Kibbe has succeeded in three different venues. She managed discovery risk so effectively as an outside counsel that she was recruited in-house, where she added a focus on cost savings. Then she took the same processes to Epiq Systems, where reduces client’s costs while still building a profitable practice. “A good process wins for everybody. The provider can make money, the client can reduce costs, and the law firm can gain defensibility.”

**FUTURE EXPLORATIONS** Kibbe sees the amount of data continuing to increase and thinks the industry is heading for a tipping point. “We’ve been building giant troves of data for years and it’s crippling us. We will have to solve the downstream data problem through proactive information governance powered by distributed computing.”

Judith Flournoy
Kelley Drye & Warren LLP

**PIONEER SPIRIT** Flournoy was a co-owner of a small, private aviation business who got interested in technology as that company automated its own back office. “I was fascinated by what a computer could do.” After leaving that business, and obtaining Novell certification; her first major project was building a network for Proskauer in Los Angeles. Hired by Proskauer in 1991 as a network engineer, Flournoy became assistant director of technology in 1995 after relocating to New York.

**TRAILS BLAZED** In 1997, Flournoy became CIO at Kelley Drye before moving to Loeb and Loeb in 2004 and last year, back to Kelley Drye. “Time demands on lawyers in service of their clients has only increased. Technology is integrated into their entire business and their lives.” Flournoy is focused on providing an environment where attorneys work in the easiest, least-resistant path possible, while adhering to sound security policies. “There’s so much noise and complexity, my team and I are focused on reducing the noise.”

**FUTURE EXPLORATIONS** Flournoy believes that technology must be about serving clients in a competitive environment. “Find every opportunity to gain efficiencies. Law firms need to be more nimble, more aware and more connected to their clients and potential clients than ever before. Firms need to continue to invest in and leverage technology and recognize that information security is key.”
Commitment to service excellence takes hard work, dedication and sacrifice. And exploring new frontiers like technology-assisted review and early case analytics takes true grit. Laura Kibbe has both.

Congratulations, Laura. You’re in good company.

Laura Kibbe
Managing Director, Expert & Professional Services
lkibbe@epiqsystems.com

Kingsley Martin
KMStandards LLC

**Pioneer Spirit** When Martin moved from Jones Day to a small firm in New Mexico in the mid 1980s, he no longer had as much support and it struck him that technology could provide a better way. He taught himself the computer language C and wrote client management and document assembly applications, immediately resulting in more than 100% realization. “I thought everyone would do this.”

**Trails Blazed** Wherever he’s been, Martin has faced “the efficiency paradox:” firms billing hourly are not rewarded for efficiency. “Senior partners think law is not price sensitive. But it is.” Martin points out that the number of transactional lawyers has fallen precipitously over the past 25 years indicating that law firms have priced themselves out of this market. In reaction, he’s formed KM Standards and written software that analyzes contracts. “Our goal is to create global contracts standards.”

**Future Explorations** By 2017, Martin expects computers to have enough power to work about as fast as people think, which will allow for true automatic analysis of documents. “Instead of relying on an expert who’s done 30 or 40 agreements, we will be able to process hundreds in a second in order to find the most relevant information, analyze for relevant issues and predict the best argument to win a case or structure a deal.”

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Phil Rosenthal & Ed Walters
Fastcase

**Pioneer Spirit** Rosenthal and Walters were both at Covington & Burling in the same office suite at the same time. “Ed was upset one day because his Fortune 5 (not 500) client said they wouldn’t pay for Lexis and Westlaw,” said Rosenthal. The two started wondering why, if the law is supposed to be in the public domain, people don’t have free access. They got excited about delivering faster, easier and smarter by applying new technologies to “democratize the law.”

**Trails Blazed** Through relationships with 24 state bar associations, 600,000 lawyers nationwide have free access to Fastcase. In 2008, they worked with PublicResource.org to create the first open public archive of Supreme Court and Court of Appeals working to make it truly public domain. “There are maybe a half dozen companies who have used that data at a proving ground,” says Walters. Fastcase is also, according to the 2013 ABA Technology Survey, the most popular mobile application of any type for lawyers.

**Future Explorations** Rosenthal and Walters are developing big data analytics on the legal database. “We are at a point in legal technology where algorithmic technologies are getting better than humans,” said Walters. They are working on applying “big data” analytics and data visualization to the legal research databases. “We are not building cubicle farms, we build server farms,” added Walters. “That’s the future. We are ahead of it now and we plan to keep running like hell,” says Rosenthal.
PIONEER SPIRIT Rowe started practicing at big law firms in 1991, eventually focusing on antitrust work, which by its nature involves big companies and many documents. “No one wanted to do document review at the associate level.” After about 10 years, he joined a much smaller firm, Nexsen Pruitt. The firm was working on giant cases, but did not have much overhead, which led to a model for managed document review. Rowe built out the review program and partnered with e-discovery provider ACT Litigation Services for data services. “We were immediately able to get meetings with large corporations the firm couldn’t get previously.” The business grew extremely quickly, and by 2006—after rebranding it “Nextra Litigation Solutions”—the firm sold it to Huron Consulting Group.

TRAILS BLAZED At Nextra and Huron, Rowe pushed a metrics-driven review process, and per unit pricing and full end-to-end discovery services, all delivered by the service provider. “I had listened to the cries of pain from clients when I was practicing.” Law firms pushed back. “Firms hated review and their associates did, too. But it made them so much money.” Law firms have for the most part have given up the fight.

FUTURE EXPLORATIONS Rowe believes that the notion that legal activities are exempt or different has been abolished. “You see price pressure and cost are controlled even after litigation hits.” But he believes companies will have to go upstream and stop the influx of documents with a credible records retention program.

PIONEER SPIRIT Socha and Gelbmann started the Electronic Discovery Reference Model initiative in response to a market need: there was no consensus as to what constituted “electronic discovery,” either among providers or consumers. “We wanted to answer two big questions: ‘What is e-discovery. And what should you do about it,’” says Socha. They built an organization that had law firms, clients, and service and software providers as active—and equal—participants. There were 35 attendees at the first meeting in 2005 and the organization has grown to include more than 260 organizations along the way.

TRAILS BLAZED EDRM has provided a tremendous amount of practical resources. “The model was wonderful and still has lots of relevance,” says Gelbmann. “But if you look at the whole body of work, that’s our biggest accomplishment.”

FUTURE EXPLORATIONS Socha and Gelbmann are continuing to push for more standards, in areas such as native files and collections, as dictated by the membership and the market. They view the entire e-discovery industry as still nascent. “There are something like 16 million new civil actions filed in the U.S. each year, right now only a fraction include meaningful e-discovery,” says Socha. “One of our main objectives is to move e-discovery into the mainstream. We’ve got a lot of work left to do.”
**PIONEER SPIRIT** A programmer by training, Sieja’s company was doing a series of custom projects for Foley & Lardner when they asked him to build “a document management system designed for litigation,” eventually named Relativity. The company found itself fielding a number of requests in this area and, after selling four more site licenses to large firms, it stopped doing project work.

**TRAILS BLAZED** Sieja had to clear some hurdles in transforming the business, including converting to a subscription-based model, which was attractive to the service providers who would serve as channel partners. Since then, kCura has broken ground a number of times, including integrating an analytics engine into its linear document review tool in 2008. “Others had built predictive tools, but it wasn’t until we shipped with a prescriptive workflow that adoption really took off.” Sieja also makes sure kCura focuses on service and support. “We realized early on that it builds a lot of loyalty. People felt comfortable and they referred us.”

**FUTURE EXPLORATIONS** Sieja believes that Technology Assisted Review is still its infancy. “We are investing a lot of engineering resources to make it better, easier and even faster. Analytics should be ubiquitous and not a luxury for the firms with the deepest pockets.” Sieja and kCura are also focusing on new products for the discovery community. “We have ridiculously smart people inside our business. They are solving big problems.”

**BARRY SOLOMON**

**Sidley Austin LLP**

**PIONEER SPIRIT** Solomon practiced at Sidley & Austin, the firm now known as Sidley Austin LLP, right out of law school. “I recognized early that technology could help further the client relationship. And Sidley provided the perfect platform.” He left to help found Interface Software, which published CRM-tool InterAction, where he was the only lawyer, and translated what Sidley was already doing. “CRM is not really a technology; it’s an approach to client service. We mirrored what Sidley was doing by improving the interactions among people and process and technology, with an intense focus on client service.”

**TRAILS BLAZED** Solomon grew the company by persuading managing partners that CRM technology had value. “I’d ask them, if you had a lateral coming with two floppy disks, one with every document the lawyer ever worked on and the other with every relationship they ever had, which would you want? The light would go on.” Along with colleague Bob Nagy, Solomon got a patent for connecting contact databases together. “Again, we took something that happened at Sidley and built technology to mirror their process. After selling Interface Software in 2004, he came back to Sidley as CMO. “Sidley gave me my start in both business and the law.”

**FUTURE EXPLORATIONS** Solomon believes that over the next decade technology such as mobile applications will be personalized to allow firms to better anticipate client needs and interests, rather than simply reacting to requests.
Learn more at kcura.com/relativity/nlj.
TIM STANLEY AND STACY STERN
JUSTIA

PIONEER SPIRIT  Stanley and Stern started Findlaw their apartment in 1995, and within six months it grew into the highest-traffic legal site in the world. “We all have to comply with laws, but people didn’t have access,” says Stern. “The net was a great way to promote access to law.” They sold out to Thomson Reuters in 2001.

TRAILS BLAZED  The pair started Justia in 2003, with a different game plan, but the same mission: to advance the availability of legal resources for the good of society. “There are those who can afford Lexis and Westlaw, and everyone else,” says Stanley. Justia is now doing case summaries for all 50 states and share it for free.

FUTURE EXPLORATIONS  Stern and Stanley are ready to take more political action to get states to free up information in a usable form and not to allow claims and copyrights “Some states have tried to make copyright claims,” says Stanley. “But at the grass roots level basically every citizen believes that information related to the law should be accessible for free.” Stern adds, “We just keep wanting to make more free information available. We’ve come a long way, but there is a long way to go.”

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