

# Information Management Evolution

*Identifying the opportunities, solutions, and challenges of succeeding in today's changing information landscape.*

On Thursday, April 25, 2013 Integrated Management Services is hosting our first **Annual Information Management Evolution Conference** in New York City. The conference will explore ways to successfully align information services with high priority business needs, and will demonstrate the value of cross-departmental collaboration in a move towards a proactive and efficient future of information management.

Attendees can expect to leave with an understanding of:

- **How Information Management (IM) is evolving;**
- **Emerging IM technologies, indicators, and metrics** (selection, development, and purchase);
- **Changes in C-Level information requirements and emerging responsibilities;**
- **How IM tools and related processes can help your firm become more competitive;**
- **Opportunities for cross departmental collaboration;**
- **How to use IM tools to connect better with external markets; and**
- **Proactive research services trade-offs** (the good, the bad, and the challenging).

Sessions will be structured panel discussions featuring case studies, testimonials, and Q&A's. All participants have been asked to focus on practical application over theory.

Attendees are encouraged to submit panel questions to IMS before the conference via e-mail ([info@integratedmgt.com](mailto:info@integratedmgt.com)) or Twitter ([@IMStweets](https://twitter.com/IMStweets)) using the official conference hashtag: #IMApril2013.

**Join our LinkedIn group** (<http://www.linkedin.com/groups?gid=4747052>) and receive a **20% discount on registration at** [IMconference.eventbrite.com](http://IMconference.eventbrite.com)



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Integrated Management Services (IMS) is a leading national management consulting firm. We help AmLaw 200 firms to take advantage of new competitive opportunities and to make lasting process and technology improvements.

**Convene (formerly Sentry Centers)**  
810 Seventh Ave  
New York, NY 10019

**Thursday April 25, 2013 from  
8:30 AM to 4:30 PM**

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# Information Management Evolution

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## 9:00 AM THE INFORMATION OPPORTUNITY

Law firms are slowly changing how they practice in response to decreasing markets (down 20% since 2008) but what does that mean for information professionals? Learn about emerging information technologies, changing law firm perspectives, and new leading indicators for succeeding as legal information professionals. Explore the opportunity to take back strategic IT decisions, bullet-proof budget requests, and create lasting value for your firm.

**Information Management Keynote:** Kingsley Martin, Founder, **KM Standards**

## 9:45 AM LOOKING FORWARD: THE EVOLUTION OF INFORMATION MANAGEMENT

What is the future of Information Management and how should we define it, communicate it to our team, and connect it effectively to our external market? This session will discuss how to begin to understand leading vs. lagging indicators, corresponding metrics, how they can be developed (or purchased) and how they can be used (processed & communicated) to manage a firm toward a long-term successful strategy.

**Strategic Services Panel:** Nestor Holynskij, Senior Director, **Integrated Management Services**; Timothy B. Corcoran, Principal, **Corcoran Consulting Group**

## 10:30 AM ADOPTING A STRATEGIC APPROACH TO MANAGEMENT

In an environment where costs are being cut, and every internal expense is being evaluated – communicating value at all levels of the organization becomes essential. Strategic management provides a platform, not only for setting direction, but for communicating effectively with management. This session will cover what makes a good strategic plan, and how it can be used as a tool to better position yourselves within the greater organization.

**Strategic Services Panel:** Lynn Oser, President, **LKO Information Management Consulting, LLC** & Former Director of Library, **WilmerHale**; Anne Stemlar, Director of Research & Knowledge Services, **Goodwin Procter, LLP**; Gina Lynch, National Director-Knowledge Services, **Bingham McCutchen LLP**

## 11:15 AM NETWORKING & COFFEE BREAK

- 11:30 AM PUTTING THE “I” BACK IN CIO**  
What opportunities exist for information professionals in the next five years, and what should today’s role encompass? What services should be provided, where is the need, and what innovations are already working? This panel will address how CIOs and their teams can take the lead in becoming information managers who are empowered to provide useful information anywhere, anytime, and in useful formats.  
**CIO Discussion Panel:** Ted Ferguson, CIO, **Kasowitz Benson Torres Friedman LLP**; Vic Peterson, CIO, **Stinson Morrison Hecker LLP**; Jim Darsigny, CIO, **Brown Rudnick LLP**; Eugene P. Stein, Director of Information Technology, **Choate Hall & Stewart LLP**
- 12:30 PM NETWORKING LUNCHEON**  
Please take this time to network with conference participants, submit panel questions via email or Twitter, and enjoy lunch!
- 1:30 PM POSITIONING WITH YOUR EXECUTIVE TEAM**  
This panel will discuss the information that executives need day-to-day to build practices, grow the firm, and understand their clients. These panelists will identify opportunities for information professionals to proactively provide services, get more face time with C-Level Executives, and more effectively communicate value.  
**Executive Team Discussion Panel:** Dan Anderson, COO, **McKenna Long & Aldridge LLP**; Jennifer Manton, CMO, **Loeb & Loeb LLP**; Tea Hoffmann, Chief Strategy Officer, **Parker Poe**
- 2:15 PM PROACTIVE RESEARCH SERVICES RISKS & REWARDS**  
Are you providing information, or answers? This key difference between proactive and reactive research services and the needs of attorneys vs. C-Level Executives can be the difference between being viewed as a cost center vs. a valued resource. What are the wins and losses in anticipating information needs, and the impact those anticipation initiatives have had? How are information providers functioning beyond the questions asked of them to become proactive providers of answers?  
**Information Services Discussion Panel:** John DiGilio, National Manager of Library & Research Services, **Reed Smith LLP**; Monice Kaczorowski, Chief Knowledge Officer, **Neal, Gerber & Eisenberg LLP**; Tom Duggan, Legal Research Services Manager, **Baker & Hostetler LLP**, Marlene Gebauer, Director of the Research Center, **Greenberg Traurig**
- 3:00 PM NETWORKING & COFFEE BREAK**

**3:15 PM BACK IN THE BUSINESS OF BUSINESS INTELLIGENCE**

Perspectives, strategies, and opportunities for leveraging strengths and skills across teams, including practice management, library/research, and business intelligence. This panel will address how collaborative, cross-functional business intelligence teams can provide better, more targeted information portfolios that can influence firm strategies and decision making.

**Business Intelligence Discussion Panel:** Amy Halverson, Litigation Knowledge Manager, **Wilson Sonsini Goodrich & Rosati**; Michele Lucero, Director of Business Development & Client Services, **LAC Group**

**4:15 PM CLOSING REMARKS**

# Speaker Highlights

*As you consider joining us for this conference, please take a moment to read through the backgrounds of our highlighted speakers.*

## **Dan Anderson, COO, McKenna Long & Aldridge LLP**



As Chief Operating Officer of McKenna Long & Aldridge in the Atlanta office, Dan Anderson is responsible for managing the non-legal operations of the firm. In this role, Dan supports the firm's objectives by developing and maintaining the necessary support platform, which includes managing the firm's resources and internal services (Finance, Human Resources, Information Technology, Knowledge Management, Administrative Support Services), and managing the firm's expenses and capital assets. Before joining MLA, Dan worked as Executive Director of Boulton Cummings Connors & Berry LLC in Nashville, Tennessee.

## **Timothy B. Corcoran, Principal, Corcoran Consulting Group**



Timothy B. Corcoran advises law firm leaders on business process improvement, legal project management, alternative fees and business development. He also advises legal technology vendors and service providers on market strategy and sales force readiness. An experienced veteran in the fields of legal technology and legal marketing, Tim has served in executive roles with a number of marquis names in the legal profession. At Thomson Reuters, he led the Sales, Account Management and Marketing functions and served on the executive leadership team of Hubbard One. Prior to that he was a Senior Consultant with legal management consultancy Altman Weil, Inc. where he co-founded the Legal Project Management practice. Tim was also Vice President of Sales & Market Planning for the Client Development division of LexisNexis, among other senior executive positions at LexisNexis. Tim is an active member of the Legal Marketing Association and currently serves on the International Board of Directors as President-elect. He is a frequent speaker and writer on law firm business development issues.

## **Jim Darsigny, CIO, Brown Rudnick LLP**



As Chief Information Officer at Brown Rudnick, Jim Darsigny oversees the Information Technology, Records, and Library functions for the firm. He is responsible for strategic planning, security, and the delivery of information and communication services to all firm employees. Jim has over 25 years of experience in law firm IT with a broad knowledge of project management, staff development, budgeting, and vendor relationships. Prior to joining Brown Rudnick, Jim was the Manager of Information Systems at Morrison, Mahoney, and Miller.



**John DiGilio**, National Manager of Library & Research Services, **Reed Smith LLP**



John DiGilio is the National Manager of Library & Research Services at Reed Smith LLP. He is a nationally known law librarian, educator, and award-winning author, with over 15 years of professional legal research experience in large law firms. John currently manages law librarians and library research programs for all U.S. offices of Reed Smith, and has authored numerous articles and research papers on law librarianship, legal research, and ethics. Previously, John has taught undergraduate and graduate courses in business law, e-commerce, ethics, fair employment practices, and applied research methodologies.

**Tom Duggan**, Legal Research Services Manager, **Baker Hostetler LLP**



As Legal Research Services Manager for Baker Hostetler LLP, Tom Duggan manages the firm's seven Legal Researchers across the country to streamline, centralize and deliver high level research services to the firm's nearly 800 lawyers in five practice areas. He has over 24 years' experience working in private law firm libraries and for legal information vendors. From 1989-2004, Tom served several different roles at Davis, Graham & Stubbs LLP, including Research Librarian, Head Librarian, and Manager of Library and Information Resources. Tom spent the next six years with West, a Thomson Reuters business, as Librarian Relations Manager for an 11-state territory, calling on, training and consulting with large law firm librarians on effectively using online and print services from West, and strategizing with them to achieve collection development, cost management and research service goals. Tom is a former President of the Colorado Association of Law Libraries, and is also a member of the American Association of Law Libraries.

**Ted Ferguson**, Chief Information Officer, **Kasowitz, Benson, Torres, and Friedman**



Ted Ferguson, CIO at Kasowitz -- a 385 attorney firm specializing in complex commercial litigation -- is a technology executive with over 20 years of experience in delivering IT strategy, knowledge and project management, team building, and infrastructure support for national and international law firms. Current projects include e-discovery, enterprise search, and marketing-related initiatives. Prior to joining Kasowitz, Ted was the IT Director at Ropes & Gray, after eight years as a technology manager at Fish & Neave.



**Marlene Gebauer**, Director of the Research Center, **Greenberg Traurig**



Marlene Gebauer is the Director of the Research Center at Greenberg Traurig. Previously a practicing lawyer, Marlene has worked as a law librarian for 15 years. Increasingly, her role revolves around knowledge management projects such as strategic purchasing, product and service creation, competitive and business intelligence and guided research. Marlene received her BA from Syracuse University, her MLIS from Rutgers, the State University of New Jersey and her JD from Case Western University School of Law.

**Amy Halverson**, Litigation Knowledge Manager, **Wilson Sonsini Goodrich & Rosati**



Amy Halverson manages knowledge management resources at Wilson Sonsini Goodrich & Rosati, a firm of more than 600 attorneys working from 12 offices in the U.S., China and Europe. An attorney and former litigator, she left private practice to direct the online editorial operations of law.com, a national legal website. She then returned to the law firm environment, where she calls upon her legal and web project experience to facilitate the development of tools that capitalize on existing law firm information flows and business processes, promoting the effective delivery of superior legal services.

**Tea Hoffmann**, Chief Strategy Officer, **Parker Poe Adams & Bernstein LLP**



Tea Hoffmann is Chief Strategy Officer for Parker Poe Adams & Bernstein, LLP in Charlotte, North Carolina. In her role, she provides guidance in the formation, development and implementation of revenue generating strategies and policies. Additionally, Tea manages and directs the Marketing and Business Development Department, establishing goals and leading a team of strategic, innovated and motivated marketing and business development professionals. As a Major in the Tennessee Army National Guard she serves as Senior Defense Counsel for the Trial Defense Service. Tea is a frequent public speaker across the United States on a wide variety of business development-related topics and authored "The Proactive Practice: How to Move Your Firm From Reactive to Proactive" in 2002 and "Master of Success" in 2004. Tea received her J.D. from Cumberland School of Law.

**Nestor Holynskyj**, Senior Director, **Integrated Management Services LLC**



Nestor Holynskyj has over 25 years of experience in the law firm information systems arena, providing clients with a strong combination of field and technical experience coupled with a management consulting background. In addition to consulting firms, he held various positions with Bowne & Co., the leading financial printing firm in the United States. His responsibilities ranged from Chief Technology Officer of Bowne Business Solutions to Senior Director of Strategic Planning for the parent corporation. While with LANSystems Inc., a network integration firm, he was the SVP of Strategy Consulting advising AmLaw 100 firms on strategic planning for technology.

**Monice Kaczorowski**, Chief Knowledge Officer, **Neal, Gerber & Eisenberg LLP**



Monice M. Kaczorowski was the Director of Library Services and Competitive Intelligence for Neal Gerber Eisenberg for 10 years before her role as Chief Knowledge Officer. Prior to joining the firm, she was Director of Libraries for Ross & Hardies for 14 years. She is a member of Neal Gerber Eisenberg's Marketing Committee, works closely with the Marketing Department, and attends monthly practice group meetings to develop needs assessments and promote business development within the firm. Monice specializes in competitive intelligence, teaching cost effective legal research, and increasing law firm profitability for library services.

**Michele A. Lucero**, Director of Business Development & Client Services, **LAC Group**



Michele A. Lucero is part of LAC Group's executive team as Director of Business Development and Client Services. Michele has more than 18 years of experience including work with the LA Law Library, West (Thomson Reuters), Mayer Brown, Weil Gotshal, Lionel Sawyer and the Las Vegas-Clark County Library District. As an accomplished law librarian and business, leadership and dispute resolution professional, Michele is adept at combining her in-depth knowledge with skillful relationship building. Ms. Lucero earned her undergraduate degree in Management & International Business from the University of Nevada Las Vegas, her M.L.S. degree in Legal Informatics from the University of North Texas, and her M.B.A. in Strategic Management from the University of North Texas. At Pepperdine University, she completed a Certificate in Dispute Resolution and is currently pursuing her Doctorate of Education in Organizational Leadership and a Masters of Dispute Resolution.

**Gina Lynch**, National Director, Knowledge Services, **Bingham McCutchen LLP**



Gina is a knowledge services professional with over thirty years of experience managing law library information centers and facilitating strategic knowledge sharing within a law firm environment. She is responsible for the overall administrative and strategic management of the ten library and research centers located nationally and internationally across Bingham. She also developed and has promoted the Competitive Intelligence unit that assists directly with firm management strategic initiatives as well as practice area business development efforts. Her areas of expertise include connecting lawyers and clients through targeted portals and dashboards that marry both internal and external information resources. Gina is also responsible for overseeing the development of the firm's next generation Intranet.

**Kingsley Martin**, Founder, **KMStandards**



Kingsley Martin is a founder of KMStandards and has developed software capable of automatically analyzing legal agreements and creating contract standards. He has been at the forefront of technology innovation in the legal practice, with 25 years of experience in practice of law, software design and development, strategy and management. Kingsley developed some of the first document assembly systems in the legal industry and was one of the leading innovators in developing the theory and practice of knowledge management. He is the author of the Knowledge Management Workbook and holds law degrees from Oxford University and Harvard Law School.

**Jennifer Manton**, CMO, **Loeb & Loeb LLP**



As Loeb & Loeb's Chief Marketing Officer, Jennifer Manton leads the firm's marketing and business development initiatives. She works closely with the firm's multidisciplinary industry and practice groups on developing and implementing marketing and business development plans. In addition, Jennifer oversees efforts to expand and improve relationships with existing clients and to engage new clients. Jennifer also directs all aspects of the firm's branding and marketing strategy, including media relations, advertising, and online marketing efforts, as well as internal and external communications. (Continued on next page)

(Jennifer Manton: continued from previous page) Jennifer has 20 years of experience in professional services marketing having developed and implemented numerous marketing, business development and client service initiatives in her career. She served as the President of the Legal Marketing Association (LMA) in 2009 and has been actively involved as a volunteer and leader in the Association since founding the Pittsburgh Chapter of the LMA in 1998. Jennifer was named a Fellow in the College of Law Practice Management in 2011. She earned a Bachelor of Science in Journalism from West Virginia University's Perley Isaac Reed School of Journalism in 1991. Jennifer was honored to be invited to deliver the School of Journalism's convocation speech to its December graduates in 2009. Jennifer lives in New York City.

**Lynn Oser**, President, **LKO Information Management Consulting, LLC**; Former Director of Library, **WilmerHale**



Lynn focuses her consulting practice on information and knowledge management for law firms. She provides guidance on strategic development, process improvement, and collaborative information delivery in corporate and legal libraries. In addition, Lynn provides direction and support in the areas of experience management, customer relationship management (CRM), data quality, information and knowledge management, as well as information taxonomy.

Previously, Lynn was the Director of Information Resource Management at WilmerHale. In this role, she oversaw the strategy, planning, operations, asset management and budgeting of both the Library Services and Enterprise Content Services groups. Her groups were responsible for the firm's global digital and print resource collections; intranet portal development; governance and content management; and implementation and management of the firm's CRM system, including expansion of the system for use as an experience management repository. Lynn was also the chair of the firm's Data Quality Counsel, a group of administrative staff tasked with identifying and tackling data quality issues across the firm's information systems.

**Vic Peterson**, CIO, **Stinson Morrison Hecker LLP**



As Chief Information Officer at Stinson Morrison Hecker LLP, Vic Peterson manages an operational group that includes the Technology, Practice Support, Records, and Library Services departments. His purpose is to support strategic growth in the firm practice areas, from ensuring deployment of well-designed technology projects to the enterprise-wide digitization of firm records and online legal research. Vic and his team provide transformative information services to the firm, to support its business and client goals.

**Eugene P. Stein**, Director of Information Technology, **Choate Hall & Stewart LLP**



Eugene P. Stein serves as the Director of Information Technology at Choate Hall & Stewart LLP. He was previously the Executive Director for four years at Richards Kibbe & Orbe LLP in New York City. Mr. Stein earned his Juris Doctor, magna cum laude, from St. John's University School of Law. Mr. Stein has accumulated over twenty-five years of experience in professional service firms and government agencies. Mr. Stein is repeatedly recognized in and out of the industry as a pioneer and thought leader who is focused on meeting the future and present needs of firms through the effective use of information systems, knowledge management and technology. Mr. Stein has held Director and C-level positions in several AmLaw 100 firms and also practiced law at Wachtell, Lipton, Rosen & Katz for a number of years. He was named Legal IT Achiever of the Year by Legal IT Week and has frequently been quoted in publications, including CIO Magazine, American Lawyer, Legal Technology News and The Wall Street Journal.

**Anne Stemlar**, Director of Research & Knowledge Services, **Goodwin Procter, LLP**



Anne Stemlar serves as Goodwin Procter's Director of Research and Knowledge Services. She joined Goodwin Procter in 2006 and is responsible for overseeing the research, library and knowledge management functions. Prior to joining Goodwin Procter, Anne spent 10 years with WilmerHale (formerly Hale and Dorr LLP). Starting as a reference librarian in 1996, she eventually became that firm's Manager of Research Services, responsible for coordinating research training and research services across the firm's offices. Anne also held reference librarian positions at Peabody & Brown (now Nixon Peabody LLP) and Kasdorf, Lewis & Swietlik, SC.

Anne is a frequent speaker on a variety of library management topics including, information strategy, library branding and marketing and innovation. She is a member of the State Bar of Wisconsin, American Association of Law Libraries and the International Legal Technology Association. Anne graduated from The University of Iowa with degrees in history and psychology, earned her J.D. from Marquette University Law School and earned an MLIS from the University of Wisconsin-Milwaukee.

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