

Contents

Introduction

By Deborah B. Farone

Part 1: Core Marketing and Business Development

Chapter 1: Building a firmwide marketing strategy – a roadmap for law firms ready to grow

By Deborah B. Farone

Chapter 2: Brand positioning and differentiation – how a clear value proposition shapes client perception

By Brandie Knox, principal and creative director, Knox Design Strategy

Part 2: Getting into the Tactics

Chapter 3: Client relationships as strategic capital – how to build an enduring key client account program

By JeanMarie Campbell, chief marketing and business development officer, Jenner & Block

Chapter 4: Cross-selling to cross-investing – breaking silos to build enterprise value and win

By Julie Henson, chief growth officer, Decipher Partners

Chapter 5: Smarter collaboration analytics – turning data into performance

By Heidi K. Gardner and Ivan Matviak

Chapter 6: Content differentiation in the age of information abundance

By Andrew Longstreth, head writer, and Jamie Diaferia, founder and CEO, Infinite

Chapter 7: Embedding a BD mindset – making it part of your professional identity

By Trish M. Lilley, chief marketing and business development officer, Barnes & Thornburg

Part 3: Developing Human Resources

Chapter 8: From knowing and doing to being – how lawyers become effective, whole person practitioners

By Diane Rosen, EdD, JD, MBA and Natalie Loeb, MS

Chapter 9: How internal communications impact morale and firm cohesion

By Allan Schoenberg, chief communications officer, and Renate Wagner, director of internal communications, Vinson & Elkins

Chapter 10: Wellbeing as business infrastructure – why BD cultures fail without psychological safety

By Renee Branson, MA, RB Consulting

Part 4: Operations and Change Management

Chapter 11: Leveraging AI as a strategic partner in business development

By Jennifer Leonard, founder, Creative Lawyers

Chapter 12: Budgeting and ROI measurement – ensuring marketing investments deliver measurable value

By Monica Rodriguez Kuniyoshi, chief marketing officer, Gundersen Dettmer

Chapter 13: Lateral integration and onboarding – using marketing strategy to accelerate success for new partners

By Jessica Grayson, Stradley Ronon

Part 5: Client-Centric Focus

Chapter 14: What the firm already knows – how integrated client intelligence drives business development

By Nat Slavin, Client Insight Ventures

Chapter 15: Succession planning – ensuring client continuity when leaders retire

By Ida Abbott, founder, Ida Abbott Consulting

Chapter 16: Partner compensation and incentives – how compensation models influence BD behaviors

By Tim Corcoran

Chapter 17: Digital presence and online reputation

By Jaron Rubenstein, tech strategist, Rubenstein Ventures

Executive summary

What does it take to develop and sustain a culture that values marketing, business development, and client care as shared responsibilities across the firm?

Now more than ever, firms are recognizing that isolated efforts, such as one-off trainings, CRM implementations, or inspirational retreats, won't transform behaviors. What's needed is a holistic approach driven from the top.

Through practical frameworks, candid interviews with firm chairs and CMOs, and real-world examples, this book shows how to empower professionals at every level to contribute to the firm's brand and growth. Not only does it demystify how a strong marketing culture is built – from leadership vision and governance to talent development, systems, and incentives – it helps readers understand how to do this in the context of complex, partnership-based environments.

Introduced by the book's editor, Deborah B. Farone, the book is split into four parts. Part one looks at core marketing and business development. In chapter one, Deborah looks at how to build a firmwide marketing strategy, aligning marketing goals with the firm's vision and its clients' needs. She firstly looks at why a firmwide strategy is needed, what can go wrong without one, and then looks at how to start – from client development priorities to how the company wants to position itself. She then explores how to get buy-in for such a strategy, and ensure long-term alignment. Before concluding with ten steps to build an integrated marketing strategy, Debroah maintains that such strategy is “a practical necessity for any firm that is serious about growth ... and about creating an environment where talented lawyers at every stage of their careers can develop and thrive.”

In a crowded legal marketplace where many firms claim similar strengths – client service, responsiveness, and deep expertise – true differentiation is difficult to articulate and even harder to sustain. Chapter to by Brandie Knox explores how law firm leaders can define a clear brand position grounded in strategy rather than marketing language. Drawing on more than two decades

of experience advising law firms on brand and digital strategy, Brandie outlines a practical framework for developing meaningful brand positioning. The chapter begins with the discovery process – examining how firms are currently perceived by internal stakeholders, clients, and the external marketplace. Through structured interviews, competitive analysis, and internal alignment exercises, leadership teams can identify the gap between current perceptions and the firm’s desired market position. The chapter provides practical tools and frameworks – including interview approaches, brand personality mapping techniques, and messaging pillars – that firms can use to clarify their value proposition.

Part two then gets into the tactics of business development strategy.

Chapter three realigns client relationships from episodic to strategic. JeanMarie Campbell provides law firm leaders and BD professionals with actionable frameworks that deepen trust with key clients, moving from a relationship “owner” mindset to a “client as our partner” mindset. Building a firm-wide key client account program that is scalable and practical is a business imperative, as clients are not simply sources of revenue, they are the firm’s most important long-term strategic asset. Client relationship management skills are not soft, but instead strategic, skills that lawyers need to hone and practice. Firms that institutionalize client relationship management outperform peers in client retention, cross-selling/servicing, and reputation. The firms that win will be those that treat clients not as matters, but as long-term partnerships, intentionally, measured, and evolving.

Chapter four then reframes cross-selling as cross-investing – a disciplined, strategic approach to collaboration that breaks down silos and drives sustainable revenue across practices and offices.

Most firms struggle with cross-selling because the work is misunderstood. It’s not about pushing services internally – it’s about building shared value, aligning incentives, and creating a culture where partners invest in each other’s success. Drawing on Julie Henson’s experience advising managing partners and integrating lateral teams, the chapter explores why cross-selling fails – lack of trust, unclear structures, and compensation models that reward individualism – and how leading firms overcome these challenges. The chapter highlights how cross-investing strengthens the entire ecosystem, incorporating shared accountability, shared intelligence, and shared opportunity. When firms shift from transactional referrals to intentional collaboration, they unlock deeper client relationships, more effective lateral integration, and meaningful revenue expansion. Ultimately, this chapter

argues that cross-investing isn't a program. It's a growth mindset – one that modern firms must adopt if they want to compete, adapt, and scale in today's legal market.

In chapter five, Heidi Gardner builds on these insights, focusing on the importance of network analysis. She explores the business case for smarter collaboration and why data and analytics are essential – from analysis to insights to action. The chapter looks at collaboration analytics from five different angles – firm, sector, practice, client, and partner – and the cross-functional collaboration required to deliver all of this.

Building a law firm culture that prizes original thought leadership has never been more important. As AI takes over more routine work and can answer basic questions, law firms need to demonstrate insights and build trust, positioning them for strategic, high-level work.

The good news is that AI can help them do it by freeing up more time and providing new tools to generate content. But it's not as simple as it sounds. Law firms must find a way to get lawyers to view their work differently. Instead of merely serving as legal technicians, they need to become business advisors who can consider risks and opportunities for their clients in a broader context. They also need to recognize “BD” activities, such as thought leadership, as essential to client service – not merely “non-billable time”. In chapter six, Jamie Diaferia and Andrew Longstreth talk to law firm CMOs who have developed cultures that reward thought leadership, whilst also considering what law firms need to know about building trust with clients in the new media landscape.

In chapter seven, Tricia M. Lilley explores how lawyers can embed business development into their professional identity. At the core of that challenge is “purpose”. Individuals pursue careers as lawyers for myriad reasons – developing a book of business doesn't top the list. Tricia looks at ways in which lawyers can make BD fit into their own lawyering style, so that it feels natural rather than forced, and is something they do willingly rather than under duress. If we reframe business development effectively – as a core professional responsibility – we can more easily move beyond the pushback, the resistance, and the fear and apprehension that some lawyers experience when asked to “sell”. This chapter offers helpful tips and tricks for firms seeking to embed client development holistically into lawyers' professional identities.

Part three of the book looks at developing human resources.

The legal profession has changed dramatically in recent decades. There are

more laws and regulations, new practice areas, exceedingly complex transactions and disputes, and increased specialization – complicated by the fact that more legal issues are multi-disciplinary. Technology has sped up the pace of work, communications, and the ability to generate work product while automating some practice areas, making room for non-lawyers to deliver certain services. The advent of artificial intelligence and its role in generating documents, analysis and strategy has further muddled how and what to learn.

Law is considered a ‘practice’ – a continual work in progress where ongoing learning is fundamental to keep current and develop the skills critical to law practice. However, the substantive law studied in law school is not sufficient to produce competent lawyers. Dynamic, complex modern law practice requires learning to act, work, and feel like a lawyer to become a professional with a strong professional identity. The process by which lawyers actually become effective practicing lawyers, however, remains something of a mystery.

The underlying assumption is that somehow, by osmosis or magic or grit, these qualities and abilities will manifest after law school. Magical thinking is not a viable strategy, so how does this transformation occur? The informal and incidental learning that takes place in the course of law practice fuel the process of moving from knowing the law to acting like a lawyer to being one. Chapter eight, by Diane Rosen and Natalie Loeb, looks at how mentoring, sponsorship and coaching can all help the lawyer gain the skillset and knowledge they need to be effective practitioners.

In professional services firms, business development is often framed through individual performance, incentives, or formal training. Chapter nine, by Allan Schoenberg and Renate Wagner, advances a broader and more durable perspective – sustained business development is rooted in firm culture, and culture is shaped, reinforced, and maintained through internal communications that are tied firmly to business goals. Readers will come away with the understanding that communications is not a downstream function or simply a distribution mechanism, but a leadership discipline that helps define how people understand their roles, collaborate across geographies, practices, and functions, and take shared responsibility for client relationships and outcomes. The chapter examines how strong internal communications strategy and execution directly influence morale, knowledge-sharing, firm cohesion, and ultimately client successes. The authors position internal communications as a strategic lever for building a firmwide

business development culture that transforms culture from an abstract concept into a competitive advantage.

Chapter ten explores the often-overlooked link between business development culture, psychological safety, and wellbeing in law firms. While firms invest heavily in BD strategy (training programs, compensation structures, CRM systems), many struggle to achieve sustained behavior change. The missing ingredient is rarely motivation or capability – it is safety. Drawing on neuroscience and real-world law firm dynamics, Renee Branson explains how threat-based environments (scarcity mindsets, zero-sum credit systems, chronic cognitive overload) suppress the very relational and collaborative behaviors that effective business development requires.

Renee’s chapter reframes common BD challenges – hoarding relationships, reluctance to cross-sell, avoidance of risk – as adaptive responses to unsafe systems rather than individual shortcomings. She offers leaders a practical lens for diagnosing when BD problems are actually culture and wellbeing problems, and why addressing psychological safety is not a “soft” intervention but a performance imperative. Her chapter concludes with actionable frameworks and leadership practices for designing BD cultures that support trust, shared ownership, sustainable growth and long-term wellbeing.

Part four then turns to operations and change management.

Chapter 11 positions AI not as a technical challenge but as a strategic opportunity for law firm leaders to fundamentally reimagine how they compete, differentiate, and grow. Rather than focusing on basic automation or efficiency gains, Jennifer Leonard explores how creative professionals can use AI as a co-intelligence to sharpen market positioning, deepen client relationships, and scale their impact during the transformative opening years of the AI era. The firms that will thrive aren’t necessarily those with the largest technology budgets, but those whose leaders foster a culture of experimentation and understand AI as a strategic thought partner for business development rather than merely an efficiency tool. The most creative professionals – those willing to experiment, learn, and iterate – will gain significant competitive advantage during this pivotal moment in the profession’s evolution.

Budgeting and ROI measurement sits at the heart of building a sustainable business development culture. It’s how you know whether or not your change management efforts have been successful, as well as how and when to refine your approach over time. Chapter 12 by Monica Rodriguez

Kuniyoshi positions budgeting and measurement not as isolated exercises, but as strategic tools for steering law firm investments toward measurable value despite the realities of limited data, lean teams, and uneven attorney engagement. The approaches and insights that Monica shares will be useful to any law firm undergoing the important work of building a business development culture – whether they are trying to change behavior among a small group of partners, shift the mindset of entire practices, or measure a large-scale program across hundreds of attorneys.

Lateral partner success doesn't start on day one – it starts before the first handshake. Chapter 13 by Jessica Grayson reframes lateral integration as a growth strategy that requires marketing and BD at the table throughout the entire process – identifying the right candidates, vetting their books of business, creating a great candidate experience, planning their launch, and building momentum that lasts. Drawing on real-world experience, this chapter gives law firm leaders practical frameworks for bringing their marketing and BD teams in earlier and more strategically. Jessica looks at how to use your firm's brand to attract top talent, conduct meaningful due diligence on portability, create an experience that wins candidates over, design business development plans before day one, execute market launches that actually work, and build integration systems that deliver real ROI. The bottom line is that lateral success is designed, not accidental. When you involve marketing and BD professionals as strategic partners (not just service providers) you reduce risk, set clearer expectations, help partners ramp up faster and get more consistent returns on your lateral investments.

Part five then explores the client-centric focus of a successful business development strategy.

Chapter 14 then turns the focus to gathering insights to inform strategy and strengthen loyalty. Nat Slavin argues that most law firm business development challenges are not effort problems. They are intelligence problems. The data needed to drive better business development decisions almost always already exists somewhere inside the firm, but it is disaggregated and trapped in silos. Once it is integrated, it reveals five things firms cannot see otherwise – what clients actually want, how they think about cross-selling, why they would move work, the criteria that drive selection, and the areas where their needs are unmet. Each of these is a business development opportunity hiding in plain sight. Leadership's job is to integrate the intelligence, surface the patterns, and translate them into a business development strategy that reflects what clients have been telling the firm all along.

Chapter 15 explores succession planning and knowledge transfer as critical components of sustaining business development and ensuring continuity when firm leaders retire or transition out of practice. Ida Abbott examines why effective succession is vital to a firm's long-term health, client retention, performance and reputation, and how poorly managed transitions can jeopardize client relationships, goodwill, and institutional knowledge. The chapter considers the often-competing perspectives of the firm, clients, potential successors, and retiring partners, including client expectations for continuity and choice, the development and retention of future leaders, and the personal, financial, and cultural challenges that can create resistance to succession planning. Ida also addresses the particular risks succession poses to business development, such as loss of key relationships, stalled growth, and uncertainty around ownership of clients. Finally, the chapter outlines a practical framework for normalizing and managing retirement, clarifying expectations and processes, and establishing oversight and accountability.

Tim Corcoran takes on partner compensation and incentives in chapter 16, looking at how compensation models influence BD behaviors.

A strong digital presence and online reputation are key to successful business development for lawyers at the individual, practice, and firm levels. Developing a proper strategy and enforcing it throughout your firm's culture are key to accelerating future growth. This final chapter by Jaron Rubenstein covers key topics firm leadership must consider, including how to leverage AI-driven tools and services to maximize effectiveness, before concluding with a self-assessment tool for firm leaders to assess the maturity of their firm's digital presence and a methodology to prioritize an implementation roadmap based on that assessment.

About the editor

Deborah Farone has had the unique opportunity to play a seminal role in developing the best practices in professional services marketing by working with the most respected and demanding lawyers and management consultants in the world.

Her advisory practice focuses on working with law firms, legal technology companies, and individual lawyers in the US, Europe, and Latin America on business development strategy, and business development and marketing department creation. She is also highly regarded for her business development training sessions for all levels of lawyers, as well as practice groups. She has led strategic planning, and is an in-demand speaker at law firm retreats and workshops around the world.

Deborah is the author of two bestselling legal marketing books: *Best Practices in Law Firm Business Development and Marketing* (PLI, 2019) – a work based on more than 60 interviews with successful law firm leaders and marketers, general counsel, and innovators in the profession – and *Breaking Ground: How Successful Women Lawyers Build Thriving Practices* (PLI, 2026).

Heidi K. Gardner, PhD, Distinguished Fellow at Harvard Law School's Center on the Legal Profession, has called Deborah "the leading expert in law firm marketing. Not only has she studied this complex topic from the peak of the legal profession, her research into what works and what doesn't is priceless for anyone interested in growing their business."

Over the past two decades, Deborah has carved out a niche by distinguishing herself as the chief marketing officer of two of the world's most prestigious law firms – Cravath Swaine & Moore LLP and Debevoise & Plimpton LLP. Prior to diving into the legal marketing profession, she honed her business development and communications skills by working at the global management consulting firm Willis Towers Watson. In her early days, she worked both in the new business department and as an account executive at Ketchum Communications.

Deborah has also been involved in the corporate and academic arena. She recently spoke at Travelers legal department and has also spoken at McKinsey

& Company. On the academic side, she has lectured at Columbia Law School, the University of Pennsylvania's Carey Law School, Cornell Law School, and Fordham Law School. She has served as an adjunct assistant professor on the faculty of New York University.

Deborah is an officer of the International Bar Association's Law Firm Management Committee, past president of the Legal Marketing Association's New York Chapter, and past chair of the Association of the Bar of the City of New York's marketing communications committee. She was a charter member of the Luxury Marketing Council and serves as an advisor to the Chairman of the Board of the New York Public Library.

Deborah was recently inducted as a Fellow in the College of Law Practice Management. She has also been honored with the Legal Marketing Association's Legacy Award, in recognition of making "a distinguishable mark on the chapter and the profession", and is one of a few members named to the LMA's Hall of Fame. In addition, she was an honoree at the YWCA's Women Leader Luncheon and serves as a member of the organization's Academy of Women Leaders. For many years, Deborah served on the Board of Directors of The Girl Scouts Council of Greater New York.

Deborah has a B.S. in Marketing and Mass Communications from Boston University's College of Communications, graduating magna cum laude. Upon graduation, she was the recipient of the College's Alumni Award for Student Excellence and a member of Psi Chi, the International Honor Society in Psychology. While as an undergraduate, she served as a teaching assistant for courses in marketing and in psychology.

About the contributors

Ida Abbott is a retirement strategist who helps lawyers design happy and purposeful retirements and helps law firms design respectful and effective succession and retirement processes. She is an internationally recognized expert on legal talent and career development, especially mentoring, leadership, and – her current focus – retirement. Before becoming a consultant to law firms, Ida practiced law for 20 years. In recognition of her lifetime contributions to the legal profession, she was elected a fellow of both the American Bar Foundation and the College of Law Practice Management. She is an advisor, coach, speaker, and author of several seminal books, including *Retirement by Design*, named one of the best retirement books of 2020 by *The Wall Street Journal*.

Renee Branson is a resilience strategist, author, and international speaker who works with law firms and professional services organizations to strengthen performance through wellbeing, psychological safety, and trauma-informed leadership. She is the founder of RB Consulting, where she advises firm leaders on how resilience and organizational culture impact decision making, collaboration, and long-term business success. With a master's degree in counseling psychology, Renee spent nearly two decades working with survivors of trauma and crisis before bringing her expertise into the legal profession. Her work bridges neuroscience, behavioral science, and leadership strategy to help organizations reduce burnout, strengthen trust, and improve team performance. Renee speaks globally on the economics of wellbeing and the neuroscience of high performance, and collaborates with law firms in the United States, the United Kingdom, and Australia.

As chief marketing and business development officer at Jenner & Block, **JeanMarie Campbell** leads client growth initiatives that focus on driving revenue and elevating the client experience. Her work includes developing strategic marketing and branding campaigns to enhance market visibility

while fostering a culture of innovation and teamwork. As a former practicing attorney for over nine years and with over 25 years of experience in client development, key account management and marketing roles, I bring a proven ability to contribute to strategy execution and strengthen client relationships. By leveraging my expertise in leadership, marketing strategy, account management and client development, I aim to align initiatives with a law firm's broader objectives and deliver impactful client solutions. I enjoy writing and speaking on topics including leadership, client relationships, business development/marketing, and coaching for high performance. I work with various law schools on their adjunct curriculum around marketing and business development. I am a certified executive coach and have a passion for coaching lawyers on business development, leadership and career development.

Jamie Diaferia is the CEO and founder of Infinite, an award-winning international communications firm. He has been named one of *Lawdragon's* "100 Leading Legal Consultants and Strategists" every year since 2016 and has been ranked by *Chambers* in its Communications supplement since 2018.

Dr Heidi K. Gardner is a Distinguished Fellow at Harvard Law School and former professor at Harvard Business School, and a globally recognized authority on organizational performance. She is CEO of the research and advisory firm Gardner & Co, and has been named by Thinkers50 as one of the world's most influential leadership experts. Dr Gardner is the bestselling author of *Smart Collaboration and Smarter Collaboration*, and has published more than 100 books, articles, and case studies. Her research has earned the top honors in her field, including awards from the Academy of Management, and has been selected more than ten times for Harvard Business Review's "Best of" collections. A Fulbright Fellow and former McKinsey consultant, Dr Gardner has lived and worked on four continents. She holds a BA in Japanese from the University of Pennsylvania, a master's degree from the London School of Economics, and a second master's degree and PhD from London Business School.

Maria Govis is a legal technology expert within Global Legal Business Services at KPMG. She has over five years' experience driving large-scale digital transformation projects for legal and compliance functions of global corporations, with a proven track record of delivering high-impact AI and

automation initiatives. She played a key role in a life sciences corporation's transformation program that was recognized by the *Financial Times* Innovative Lawyers 2021 and 2022 Award. Throughout her legal tech and consulting career, she has delivered projects using agile methodology and facilitated legal process improvement workshops for 70+ legal professionals. Maria holds a law degree from the University of Düsseldorf, Germany and a prior degree in translation and interpreting from Moscow State University, which included an academic stay at the University of Basque Country in Spain. She is fluent in English, German, Spanish, Brazilian Portuguese, and Russian, and currently works out of the UK. Maria's research and writing focus on organizational management in the age of AI, non-linear career paths, and the future of work.

Julie Henson is a growth strategist and chief growth officer at Decipher Investigative Intelligence, where she advises law firm leaders on revenue growth, talent strategy, market expansion, and competitive positioning. With more than 20 years of experience in the legal industry, she works closely with managing partners, executive committees, and c-suite leaders to help firms grow with greater precision and long-term alignment. Previously serving as chief client officer for an AmLaw 100 firm, Julie led firmwide initiatives focused on client development, cross-investment, leadership engagement, and strategic expansion. She is known for helping firms identify high impact growth opportunities through data, market intelligence, and relationship strategy while strengthening collaboration across practices and offices. Julie regularly counsels firms on lateral growth, client investment strategies, leadership alignment, and the evolving business dynamics shaping the future of the legal industry.

Brandie Knox is founder and principal of Knox Design Strategy, a brand and digital strategy firm advising law firms. She helps firms clarify their positioning and create meaningful digital experiences for clients, prospective clients, and internal teams. Her work spans both external and internal law firm initiatives – from brand strategy and websites to knowledge management systems that help attorneys and staff access information and collaborate more effectively. With more than two decades of experience, Brandie previously managed the brand and design team at Shearman & Sterling (now A&O Shearman) before launching Knox Design Strategy in 2009.

Brandie is also the founder of Moxx, a digital case notebook designed to help litigation teams organize evidence, build case narratives, and collaborate more effectively throughout the lifecycle of a case. She brings a strategic perspective to brand positioning, helping law firms turn differentiation into something clients, prospective clients, and internal teams can see, understand, and trust.

Jen Leonard is the founder of Creative Lawyers, a company that works with legal leaders to drive creative solutions that respond to an era of significant change. Before launching her company, Jen was the first chief innovation officer and executive director of the Future of the Profession Initiative at Penn Carey Law School. At Penn Carey Law, Jen has taught Modern Law Firm Business Strategy, Design Thinking for Lawyers, and Generative AI in Law Practice. She has also taught design thinking to senior executives in Wharton's Executive MBA program. She hosts several podcasts, including *Fast-Tracked: Emergent Issues in the Legal Profession* (Practising Law Institute) and *AI and the Future of Law* (co-hosted with Bridget McCormack, president and CEO of the American Arbitration Association). She was named to the ABA's Women in Legal Tech list of honorees in 2024 and serves on the Board of Pro Bono Institute. Jen practiced law for ten years after graduating from Penn Carey Law.

Trish Lilley is an established leader in the legal industry with more than 25 years' experience shaping growth strategies for both US and global firms from 250 to 850+ attorneys and nearly \$1B in annual revenue. She has led large-scale functional and cultural transformations across client development, marketing, employee relations, and communications. As chief marketing and business development officer at four AmLaw firms, Trish is recognized for architecting modern, data-driven business development functions that align client needs, market intelligence, and firm capabilities to drive measurable results and position these functions as strategic engines for revenue and relationship expansion. Her work emphasizes practical innovation – integrating technology, analytics, and cross-functional collaboration to identify opportunities, strengthen client engagement, and accelerate growth. A frequent contributor on legal industry trends, Trish is widely regarded as a forward-thinking, insightful voice on how firms can modernize operations and growth strategies. She speaks often at industry conferences and law schools and has been published and quoted in various outlets,

including *The American Lawyer* and *The New York Times*. Her work has been recognized for impact and innovation by the Managing Partner Forum, *The New York Law Journal*, the Web Marketing Association, and others.

Natalie Loeb is founder and co CEO of Loeb Leadership, a leading coaching and development firm with 100+ consultants across the US and Europe. A visionary entrepreneur and seasoned female business leader, she has built a family owned company from the ground up and brings over 30 years of expertise in talent development, executive coaching, and organizational transformation. Previously on the HR team at Skadden, Arps in New York, Natalie designed leadership academies and coached senior leaders – experiences that inspired her to found Loeb Leadership in 1997 to cultivate self aware, resilient, and inclusive leaders. She partners with senior teams to reshape culture, design workplace inclusion initiatives, streamline roles and processes, and deliver scalable leadership programs. Natalie holds an M.S. in Industrial/Organizational Psychology, executive coach training from Baruch College, and certifications in 15+ assessment tools. A prolific writer and sought after speaker, she is PLI faculty, authors the Coach’s Counsel column, and co authored *Beyond the Courtroom*.

Andrew Longstreth is head writer at Infinite, an award-winning international communications firm. A former journalist with Reuters and *The American Lawyer*, he has written about legal affairs and the legal industry for more than two decades.

Diane Rosen is an experienced coach, organizational consultant, training professional, lawyer, and mediator. She is the founder and president of dr2 Consultants LLC, which helps organizations, teams, and individuals achieve their goals, enhance existing resources, improve and optimize performance, manage transitions, support leadership development, and experience the extraordinary. Diane began her career at Weil Gotshal & Manges and Skadden Arps Slate Meagher & Flom, and maintains a private mediation practice in New York. She was formerly counsel to Herrick Feinstein LLP and Ortoli Rosenstadt LLP where she handled real estate and corporate transactions. Diane has served on many non-profit boards and was the founding vice president of Girls Learn International, a non-profit organization that works to combat the global crisis in girls’ education.

Jaron Rubenstein is a digital marketing technology innovator, software engineer, technology strategist, and proven business leader who brings deep operational, marketing, and data security expertise to professional services organizations. Jaron excels at aligning technical vision with business goals, building on decades of experience delivering sophisticated marketing technology solutions to leading law firms. Jaron is the founder and former CEO of RubyLaw, a legal marketing technology SaaS platform that powers websites, manages experience data, generates marketing documents for proposals and presentations, and ensures the integrity of digital content for law firms of all sizes. He established RubyLaw as the most modern marketing technology innovator, set the strategic vision, led the product and technology strategy, and grew RubyLaw to a significant share of the Am Law 200 market. In his current roles as a consulting CTO and chief AI officer, Jaron is designing and building the next generation of AI-enhanced digital marketing and business agents.

Nathaniel Slavin is the CEO of ClientSignal, the AI-driven client intelligence platform for law firms, and the founder of Client Insight Ventures, its consulting arm. For more than three decades Nat has been at the center of important conversations between law firms and their clients. As founder of one of the legal industry's leading client feedback practices, Nat has conducted thousands of confidential conversations with corporate counsel, general counsel, and C-suite executives, uncovering what clients really think about their law firms, what drives loyalty, what reveals competitive intelligence, and what puts relationships at risk. He has led the creation of client experience and service programs at firms across the AmLaw 200 and regularly collaborates with firm leaders on client team strategy. Across both ventures, Nat brings the voice of the client directly to law firm partners, client teams, and firm leadership to inform and advise on business development and client growth strategies. Nat is an elected fellow in the College of Law Practice Management and a Legal Marketing Association Hall of Fame inductee.