

PRIVATE CLIENT MINI MBA & RISING LEADERS FORUM

Tuesday October 15th 2019
Mini MBA Global Elite Welcome

17:00 - onwards

Arrival of Global Elite

17:00 - 18:30

Walking tour of Oxford University

Free time to walk around (optional) - there is a small fee to get into Christchurch.

18:00 - 19:00

Choral Evensong at Christchurch

Christchurch College, Oxford

Optional for those who would like to tour Christchurch.

19:00 - 19:30

Drinks reception

19:30

Dinner for the Private Client Global Elite



PRIVATE CLIENT MINI MBA & RISING LEADERS FORUM

Wednesday October 16th 2019

Mini MBA Private Client Global Elite

How is the Mini MBA taught?

- Case studies, lectures and small group discussions enable attendees to deliberate on the determinants of sustained firm success, give exposure to real-world issues and help work through possible approaches decision making about real-life management problems.
- The result is a unique learning event which blends academic and practically based sessions to provide partners not only with an in-depth understanding of the concepts of law firm management and the partner role, but also with the skills to apply those concepts in their daily working lives.

07:30 - 08:30

Breakfast

*The Dining Hall, Somerville College
Dining Hall*

08:30 - 09:00

Registration and introductions

*Margaret Thatcher Centre, Somerville College
Registration at the MT Centre*

09:00 - 10:30

Strategic planning for Law Firms: A practical roadmap

Why are some law firms more successful than others? This is the fundamental question of the session. As superior performance accrues to firms with a competitive advantage, this session examines how law firms develop and maintain a competitive advantage.

This session offers a deeper understanding of the complexities of strategy formulation and disruption. Drawing upon a wider set of academic research, you will be equipped with new ways of thinking and tools to gain and sustain a competitive advantage. You will be able to identify traditional and current threats and to seize the opportunities hidden within them.

Lionel Paoella, University Lecturer. Cambridge Judge Business School & Affiliated Faculty at Harvard Law School (Center on Legal Profession)
Margaret Thatcher Centre, Somerville College

10:30 - 10:50

Coffee break

Margaret Thatcher Centre, Somerville College

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10:50 - 12:20

Strategic response to disruption

Law firms today are operating in times of unprecedented change, and all of the data indicates that this is set to continue and accelerate. In this session, we will consider how the law firm leader identifies and tackles the need for significant change in the firm's strategy and business model.

Lionel Paoella, University Lecturer. Cambridge Judge Business School & Affiliated Faculty at Harvard Law School (Center on Legal Profession)
Margaret Thatcher Centre, Somerville College

12:20- 13:20

Lunch

Lunch in the Margaret Thatcher Centre

13:20 - 14:50

Creating an "orchestrating" culture

This session positions "orchestrating" as the key mechanism in underpinning personal development, account growth and firm-level competitive advantage. Central to this model is a mindset-shift from expert to orchestrator, which takes into account the challenges of leading a partnership of relatively autonomous high-performers, as well as the need for continuous innovation in a highly competitive sector. The session is highly interactive and includes diagnostics for self-assessment and actionable insights.

Michael Smets, Associate Professor in Management and Organisation Studies, Saïd Business School, Oxford University
Margaret Thatcher Centre, Somerville College

14:50 - 15:20

Coffee break

Margaret Thatcher Centre, Somerville College

15:20 - 17:00

Leveraging the power of "doubt"

Doubt is a topic that is highly relevant in a time of flux and disruption. Based on interviews with over 150 corporate CEOs, this session helps decision-makers leverage doubt as a positive force for better decision-making and more compelling communication. The framework being taught helps senior leaders "outsource doubt" insofar as they can be more deliberate on who they choose as sounding boards in their decision-making. This is of particular relevance for private client lawyers: When a particular client finds themselves in what we call the "landscape of doubt", the more strategic you can be in offering a particular type of conversation to help clients through moments of doubt.

Michael Smets, Associate Professor in Management and Organisation Studies, Saïd Business School, Oxford University
Margaret Thatcher Centre, Somerville College

17:00

Close of Mini MBA Global Elite

PRIVATE CLIENT MINI MBA & RISING LEADERS FORUM

Wednesday October 16th 2019

Mini MBA Rising Leaders Welcome

17:00 - 18:30

Walking tour of Oxford University

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18:00 - 19:00

Choral Evensong at Christchurch

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19:30 - 20:00

Drinks reception

20:00

Dinner for Rising Leaders

PRIVATE CLIENT MINI MBA & RISING LEADERS FORUM

Thursday October 17th 2019

Mini MBA Rising Leaders

The Mini MBA for Rising Leaders has been created to support the next generation of leaders, who the firm is expecting to take on a leadership role in the near future. The aim is to prepare the Rising Leaders for these new roles by inspiring change and developing a holistic understanding of the challenges facing, and the skills and perspectives required of, effective law firm leaders.

How is the Mini MBA Rising Leaders taught?

The delivery style is deliberately varied, including debating, role play and conventional lecturing.

- All sessions are designed to draw out simple, implementable first steps
- Frequent reflection and discussion in the room about application of the relevant topic to specific situations in participants' business
- Commitment to specific personal and team actions in front of the group

About Red Kite Training

Red Kite Training has over 25 years' experience of developing, tailoring and delivering Commercial and Financial Awareness training sessions, events, business simulations and workshops.

They have worked with businesses in the legal, accounting and business services, national newspaper, television and film, national magazines, construction, credit finance and banking, architecture and planning, housing association, insurance, retail, transport, university and business school, and manufacturing sectors.

Red Kite are used to getting under the skin of businesses and understanding what drives their Commercial and Financial success. They have worked with clients in the UK, Europe, Australia and China.

PRIVATE CLIENT MINI MBA & RISING LEADERS FORUM

Thursday October 17th 2019

Mini MBA Rising Leaders

07:30 - 08:30

Breakfast

Dining Hall, Somerville

08:30 - 09:00

Registration and introductions

Margaret Thatcher Centre, Somerville College

09:00- 09:15

Introduction

Amy Glover, Director Private Client, ALM

Margaret Thatcher Centre, Somerville College

09:30 - 10:30

Ready for business: How law firms make money (Part 1)

This is an interactive business simulation, enabling delegates to understand the key commercial and financial issues facing law firms.

All attendees will gain a deep understanding of how law firms operate and the decisions that have to be taken in order to ensure commercial and financial success. They will also understand how they as individuals fit into the bigger picture of their law firm:

- The need for a carefully thought out business development strategy in order to generate client work
- The need for careful resources planning and forecasting ahead in an uncertain business environment
- The impact of over or under staffing on financial and commercial performance
- The need to control costs and cash flow
- That cash not profit pays the bills
- That when law firms grow, costs and the need for cash grow disproportionately
- How difficult it can be to create increasing levels of profit on a consistent basis
- How important fee earner utilisation and charge rate realisation are in order to generate profit for the firm
- The typical business risks faced by law firms and methods to deal with those risks
- The commercial and financial jargon that is used within law firms.

Margaret Thatcher Centre, Somerville College

10:30 - 10:50

Coffee break

Margaret Thatcher Centre, Somerville College

PRIVATE CLIENT MINI MBA & RISING LEADERS FORUM

Thursday October 17th 2019

Mini MBA Rising Leaders

10:50 - 12:30	Ready For Business- How Law Firms Make Money (Part 2) <i>Margaret Thatcher Centre, Somerville College</i>
12:30- 13:30	Lunch <i>Margaret Thatcher Centre, Somerville College</i>
13:30 - 15:00	Ready For Business- How Law Firms Make Money (Part 3) <i>Margaret Thatcher Centre, Somerville College</i>
15:00- 15:15	Coffee break <i>Margaret Thatcher Centre, Somerville College</i>
15:15 - 17:15	The cardinal sins and rules of profitability To finish the day, this workshop will ensure that delegates are aware of: <ul style="list-style-type: none">• The financial impact on profit and cash flow of these such sins• Tease out which sins are committed by whom, in which departments and for which types of client work• Go on to explore the rules of profitability which must be followed in the future so as to not only protect, but more importantly, increase the profit and cash generated by the firm. <i>Margaret Thatcher Centre, Somerville College</i>
17:15 - 17:30	Reflections on the day and close <i>Margaret Thatcher Centre, Somerville College</i>
17:30	Close of Mini MBA Global Elite

PRIVATE CLIENT MINI MBA & RISING LEADERS FORUM

Friday October 18th 2019

Rising Leaders Forum

Launched alongside **Piers Barclay**, Head of Private Client, **Macfarlanes**, the goal of Global Elite Rising Leader Forum is to create an opportunity for the world's up and coming private client lawyers to come together and debate the most challenging issues in 2019. This is a forum created by the Rising Leaders for the Rising Leaders - senior associates and partners within their first five years of promotion.

08.00	Arrival and registration
09.00	Welcome comments from the Co-Chairs Piers Barclay , Macfarlanes, UK Bernadette Carey , Carey Olsen, Cayman
09.10	Next gen philanthropy: Innovation and impact <ul style="list-style-type: none">• Changing expectations and views on how the next generation fulfils its philanthropic duties• Examining the shift from traditional grant making to driving systemic change• Impact of new technologies on the charitable sector Isobel Morten Macfarlanes, UK Sasha Grinberg , Cadwalader, USA
09.50	Changing families: Time for a revolution? Claire Weeks , Maurice Turnor Gardner, UK Oliver Sigg , Walder Wyss, Switzerland
10.40	Coffee break
11.10	Virtual family office: A natural progression from "trusted advisor?" Josephine Howe , Ogier, Jersey David Lambotte , Oppenheimer Generations, Jersey
11.40	Getting creative: Advances in employee ownership structures Giampaolo Genta , BonelliErede, Italy
12.20	Lunch

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Friday October 18th 2019

Rising Leaders Forum

13.20	The business of running a law firm: Budgeting and revenue generation
14.00	Breakout discussions <ol style="list-style-type: none">1. "Get it off your chest"2. Running a smooth (and successful) cross border matter <p>Eleni Skoufari, Partner, Zepos & Yannopoulos, Greece</p> <ol style="list-style-type: none">3. The transition from associate to partner: Quality vs. building leverage
15.00	Using International Business Treaties to your client's benefit <ul style="list-style-type: none">• Reviewing the broad number and scope of business treaties available in the (private) client arena; Identifying areas which are not covered by treaties• Impact of global mobility, the new technologies and increased transparency on the use of business treaties• Planning with international business treaties from a client's perspective: mid- to long-term outlook <p>Dr. Ruth Bloch-Riemer, Bär & Karrer AG, Switzerland</p>
15.40	Coffee break
16.10	Arbitration: Time to stop fighting (and start arbitrating)? <ul style="list-style-type: none">• Barriers to arbitrating trusts and estates disputes;• Pioneering jurisdictions in the arbitration of trust disputes;• Should it be adopted more widely? <p>Mark Lindley, Boodle Hatfield, UK Jessica Henson, BCLP, UK</p>
16.50	Would I lie to you? The 6 minute pitch <p>Yindi Gesinde, Baker McKenzie, UK Nicole Buncher, Clifford Chance, UK</p>
17.20	Closing comments <p>Piers Barclay, Macfarlanes, UK Bernadette Carey, Carey Olsen, Cayman</p>
17.30	Drinks reception