

Maintaining the Perfect Partnership

Tips to Strengthen Your Partnership with Your Clients



Final Program

 #INTANYC

March 4-5 | New York, NY | New York Marriott Marquis



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Badges and Admittance

Only persons registered for this meeting are admitted to educational sessions, meals and receptions. Those properly registered will receive an INTA name badge. Name badges must be worn at all times to gain access to all official INTA functions. Anyone found counterfeiting, copying or sharing badges, may be subject to sanctions up to and including removal from the meeting and revocation of your INTA membership.

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Maintaining the Perfect Partnership

Tips to Strengthen Your Partnership with Your Clients

Welcome to the 2014 Maintaining the Perfect Partnership Conference.

This intermediate-to-advanced level program is designed as a continuation of the very popular Creating the Perfect Partnership Conference which was previously offered in London and New York. Numerous in-house and outside practitioners are slated to give attendees guidance and share best practices to maintain the perfect partnership and keep clients returning for more.

The legal market is more competitive than ever before and slashing prices is not the only way to ensure that in-house counsel is satisfied with legal services. What is the perfect balance of providing high quality legal service to in-house counsel while at the same time addressing sensitive topics like budgets and conflicts?

Interactive sessions will focus on numerous topics including components of client satisfaction, communication and best practices in maintaining client relationships, fees and budgets, special considerations for international partnerships, marketing and social media tips and ethics and more. An enhanced networking reception will offer attendees the chance to mingle with members from INTA's Board of Directors and other IP professionals attending the Pre-Annual Meeting Reception held on March 4.

INTA Calendar of Events

Plan your calendar with these INTA events and stay up to date on issues that affect your trademarks—domestically, regionally and globally.

March 7	Annual Meeting early registration ends!	Register online
March 15	Saul Lefkowitz Moot Court Competition—National Finals	Washington, DC, USA
March 17–20	U.S. Roundtables	Various U.S. Cities
April 10	INTA/USPTO Roundtables	Indianapolis, IN USA
April 23	INTA/USPTO Roundtables	Philadelphia, PA USA
May 10–14	136 th Annual Meeting	Hong Kong SAR, China
June 2–13	U.S. Roundtables	Various U.S. Cities
June 16–27	TMA Roundtables	Various U.S. Cities
September 2–12	TMA Roundtables	Various U.S. Cities
September 18–19	Trademarks and the New Internet Conference	San Francisco, CA USA
October 12–15	Trademark Administrators and Practitioners Meeting	Arlington, VA USA
October 20–31	U.S. Roundtables	Various U.S. Cities
November 11–15	Leadership Meeting	Phoenix, AZ USA
December 8–9	When Trademarks Overlap with Other IP Rights	Munich, Germany

Learn more about INTA events, including international roundtables, networking receptions, e-Learning, academic competitions and more, at www.inta.org/programs

Dates and topics subject to change. Contact meetings@inta.org for the latest information.

Agenda

Tuesday, March 4

8:00 am–5:00 pm **Registration and Information Desk Open** **Manhattan Ballroom**

8:00 am–9:00 am **Networking Breakfast** **Manhattan Ballroom**

9:00 am–9:30 am **Welcome** **Manhattan Ballroom**

INTA CEO Etienne Sanz de Acedo, International Trademark Association (United States)
2014 INTA President Mei-Ian E.W. Stark, Fox Entertainment Group (United States)

Program Co-Chairs

Tish Berard, Hearts On Fire Company LLC (United States)
Abigail Rubinstein, Weiss & Arons LLP (United States)

9:35 am–10:55 am **SESSION I** **Manhattan Ballroom**

**Dos and Don'ts of Client Satisfaction: What to Do
(And What Not to Do) to Become and Stay Outside Counsel**

In-house practitioners will have a frank discussion about the dos and don'ts for outside counsel and what clients look for in retaining and maintaining the partnership. Panelists will provide insight into how they select their outside counsel and what they expect from them once they have been hired. Learn what outside counsel can do (and what they should avoid doing) in order to build, enhance and solidify the perfect partnership with in-house counsel.

Moderator:

Laura Ganoza, Foley & Lardner LLP (United States)

Speakers:

Tish Berard, Hearts On Fire Company LLC (United States)
Dianne K. Cahill, American Express (United States)
Susan L. Crane, Wyndham Worldwide Corporation (United States)

11:00 am–11:10 am **Networking Break** **Manhattan Ballroom**

11:15 am–12:15 pm **SESSION II** **Manhattan Ballroom**

**Best Practices and the Secret to Effective Communication
for In-House and Outside Counsel**

In today's competitive global economy, in-house counsel are under constant pressure to deliver increased value while reducing costs. And outside counsel are under constant pressure to deliver

Tuesday, March 4 (continued)

increased value while maintaining revenue and profitability. So how can each party work together to create a successful and long-lasting relationship while achieving the results it needs?

In-house counsel and their real-life outside counsel will have an interactive discussion about their relationship and what each side brings to the table. Is it just about the lowest fees? Or the quickest response time? Or are there more compelling considerations? What does in-house counsel want from outside counsel? And what does outside counsel need from in-house counsel? Speakers will expose the issues facing each side and share insights and tips on making the relationship a true partnership.

Moderator:

Cathy Lueders, MasterCard International Incorporated (United States)

Speakers:

Bryce Coughlin, Fox Entertainment Group (United States)

Curtis Krechevsky, Cantor Colburn LLP (United States)

Carrie Olson, Day Pitney LLP (United States)

12:30 pm–1:30 pm

Networking Lunch

Empire Complex

1:45 pm–2:45 pm

SESSION III

Manhattan Ballroom

Fees & Budgets: Can Clients and Outside Counsel Agree?

No one ever likes to discuss money, which makes establishing expectations and maintaining communication over fees especially challenging. This interactive panel will demonstrate how to discuss the tricky and sensitive topic of budgets and fees. Speakers will also share some best practices for budgeting 101, including:

- Understating your client’s legal budget.
- What to include on invoices.
- How to handle going over your client’s budget.
- How to avoid pitfalls and make sure you get paid.

Moderator:

Abigail Rubinstein, Weiss & Arons LLP (United States)

Speakers:

Karen Fong, Rouse (United Kingdom)

Max Harrison Millican, Dell Inc. (United States)

Christopher Turk, The H.D. Lee Company, Inc. (United States)

Tuesday, March 4 (continued)

2:45 pm–3:00 pm **Coffee Break** **Manhattan Ballroom**

3:00 pm–4:15 pm **SESSION IV** **Manhattan Ballroom**
**Where in the World Is Your Client? Special Considerations
for International Partnerships**

In-house speakers with cross-jurisdictional client relationships will share their special considerations when dealing with international partnerships. Panelists will discuss:

- What are the differences in international business relationships that may arise?
- Is there a difference if the client is a corporation or a law firm?
- How can you be aware of and address differences before they become problems?
- Are there legal or ethical ramifications in cross-jurisdictional relationships?—Foreign Corrupt Practices Act of 1977 (FCPA).
- What to do if there are concerns about potential violations of either U.S. or foreign laws.
- General best practices when maintaining partnerships with international clients.

Moderator:

Dale Cendali, Kirkland & Ellis LLP (United States)

Speakers:

Melanie Bradley, Colgate (United States)

Dolores DiBella, National Football League (United States)

Matthew A. Pater, Pfizer Inc. (United States)

4:30 pm–5:30 pm **SESSION V** **Manhattan Ballroom**
**Creative and Effective Marketing Strategies to Strengthen
the In-House/Outside Counsel Relationship**

As corporate budgets require in-house counsel to manage a broader range of matters, in-house counsel are increasingly looking for outside counsel who have resources to match. At the same time, outside counsel often are under pressure to deepen their relationships with clients by cross-marketing other practice areas.

Marketing trends have been moving toward innovation and personalization for years now, and mass email blasts and generic newsletters tend to feel impersonal, untailored and downright boring. This panel will explore innovative strategies to create relevant and eye-catching content to attract the attention of in-house counsel and avoid the dreaded spam box.

Moderator:

Bryce Coughlin, Fox Entertainment Group (United States)

Tuesday, March 4 (continued)

Speakers:

Alexandra DeNeve, Major League Baseball Properties, Inc. (United States)
 Brian L. Heidelberger, Winston & Strawn LLP (United States)
 Amanda Neville, Three Furies (United States)

6:00 pm–8:00 pm Pre-Annual Meeting and Networking Reception Inc Lounge at Time Hotel

Wednesday, March 5

8:00 am–12:00 pm Registration and Information Desk Open Manhattan Ballroom

8:00 am–9:00 am Networking Breakfast Manhattan Ballroom

9:00 am–9:10 am Welcome by Program Co-Chairs Manhattan Ballroom

Tish Berard, Hearts On Fire Company LLC (United States)
 Abigail Rubinstein, Weiss & Arons LLP (United States)

9:15 am–10:45 am SESSION VI Manhattan Ballroom
Ethics—To Tell or Not to Tell

Speakers will offer practical advice regarding disclosures when discussing conflicts with clients, as well as advice from in-house counsel as to what they think is important and want to hear from their outside counsel. The panel will discuss:

- Understanding conflicts.
 - What constitutes a conflict?
 - Parent, subsidiary, affiliate work and conflicts in trademark search report.
 - International affiliates—is there a conflict?
- Engagement letters and conflict waivers.
- Disclosures—what can be disclosed when, and how?
- What if your client is not located in the United States—what ethical rules apply?

Moderator:

Jeanne Hamburg, Norris, McLaughlin & Marcus, P.A. (United States)

Speakers:

Sara B. Blotner, Citigroup Inc. (United States)
 Colm J. Dobbyn, MasterCard International Incorporated (United States)
 Oliver Herzfeld, Beanstalk (United States)

Wednesday, March 5 (continued)

10:45 am–11:15 am Coffee Break Manhattan Ballroom

11:20 am–12:20 pm SESSION VII Manhattan Ballroom
Global External Radar and Industry Knowledge:
How Well Do You Know Your Client’s Business?

This session will look closely at how to use your global external radar and industry knowledge, including news, industry reports and different social media platforms to strengthen and broaden the client/counsel relationship. Speakers will discuss the following:

- What can external radar and industry knowledge do for the client relationship?
- Understanding your client’s needs better through Social Media.
 - Make use of existing networking sites to better understand and anticipate client needs.
 - Understanding which platforms to use to deepen your knowledge of your client’s business and broaden your client relationships.
- Sharing your connections with clients and vice versa.

Moderator:
Dana Gilland (United States)

Speakers:
Karen A. Butcher, Morgan, Lewis & Bockius LLP (United States)
Jeremy Feigelson, Debevoise & Plimpton LLP (United States)
Cynthia Rowden, Bereskin & Parr LLP (Canada)

12:20 pm Closing Remarks and Thank You Manhattan Ballroom

Course Materials

Course materials are only available online on the attendee resource portal, <http://applications.inta.org/mp/14MPP>. The portal will be updated after the meeting and you will be able to access all materials, the attendee directory and copies of the PowerPoint® presentations.

Continuing Legal Education

This conference qualifies as an educational program for CLE credits and CPD Points. For more information, please email cle@inta.org. Be sure to stop by the Registration and Information Desk at the conference to sign the CLE book.

Project Team

Exceptional topics, faculty and presentations have come to distinguish INTA programs and earn them an unmatched reputation in the field of trademark law and practice. INTA owes this achievement to the many volunteers who so willingly contribute their time and energy to this effort.

INTA would like to thank the Project Team for its excellent work in planning and presenting this conference.

Chairs:

Tish Berard, Hearts On Fire Company LLC (United States)
Abigail Rubinstein, Weiss & Arons LLP (United States)

Members:

Laura Ganoza, Foley & Lardner (United States)
Cathy L. Lueders, MasterCard International Incorporated (United States)
Dale Cendali, Kirkland & Ellis LLP (United States)
Bryce Coughlin, Fox Entertainment Group (United States)
Jeanne Hamburg, Norris, McLaughlin & Marcus, P.A. (United States)
Dana Gilland (United States)

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Sarah O'Connell, Manager, Programs Development, Education, International Trademark Association (United States)

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We take pride in our ability to meet clients' needs by providing professional and practical advice of the highest quality and employing teamwork to render services in a thorough yet timely manner. Our more than 36 lawyers are assisted by experienced paralegals and administrative staff supported by advanced technology tools. Most of our lawyers are multilingual, speaking Spanish, English, German, French, Portuguese, Italian and Japanese to facilitate communications.

The Firm's General Practice includes mergers and acquisitions, contracts, employment, environmental, energy, telecommunications, litigation, transactions, franchising and agency, joint ventures, project finance and private equity. Our Intellectual Property Practice covers all aspects of trademark, patent, copyright, domain name, utility and industrial design protection; licensing, sanitary registrations and enforcement by border measures, as well as unfair competition, administrative and civil litigation.



Corsearch's innovative solutions address the needs of trademark professionals across the full spectrum of the brand lifecycle. Corsearch services, including those from Avantiq and CitizenHawk, combine deep domain expertise and unparalleled service with quality research and sophisticated technology designed for clearing and protecting trademarks globally, both online and offline.

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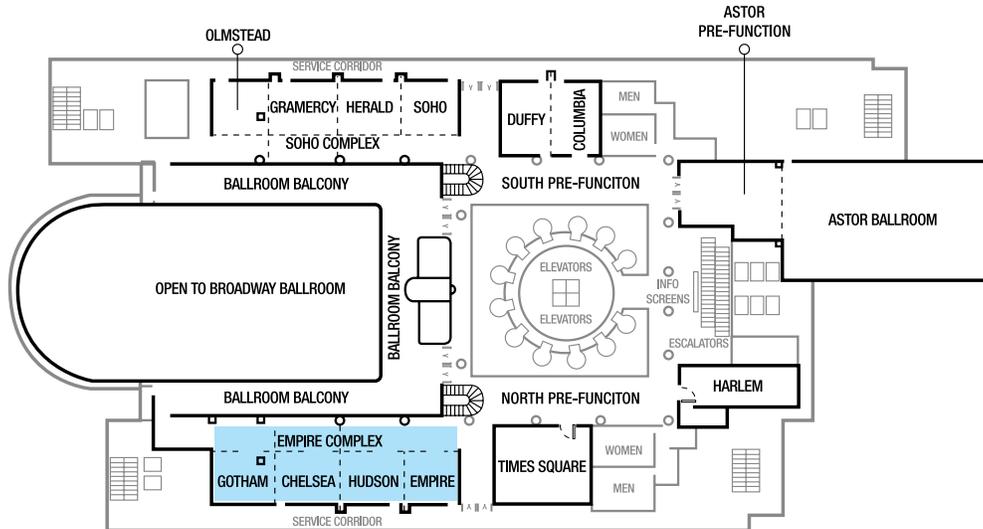
.CLUB Domains is the registry for the new top level domain, .CLUB. With new domain extensions such as .CLUB now available it is important for brands and trademark holders to consider a domain name strategy that both protects their brand and serves their customers. "Brandname.club" is an ideal web address for a company's loyalty, affinity or reward program and even a brand's social community. "Yourname.club" is the logical and authentic name for your community of customers and fans. After all, aren't your customers already a member of your club? A brand, especially a retail or consumer facing brand, should want to own its respective .CLUB name in order to own and control its community. .CLUB is currently in its Trademark Sunrise period for marks registered in the TMCH. Sunrise ends March 29, 2014. For more info please visit www.nic.club/sunrise.



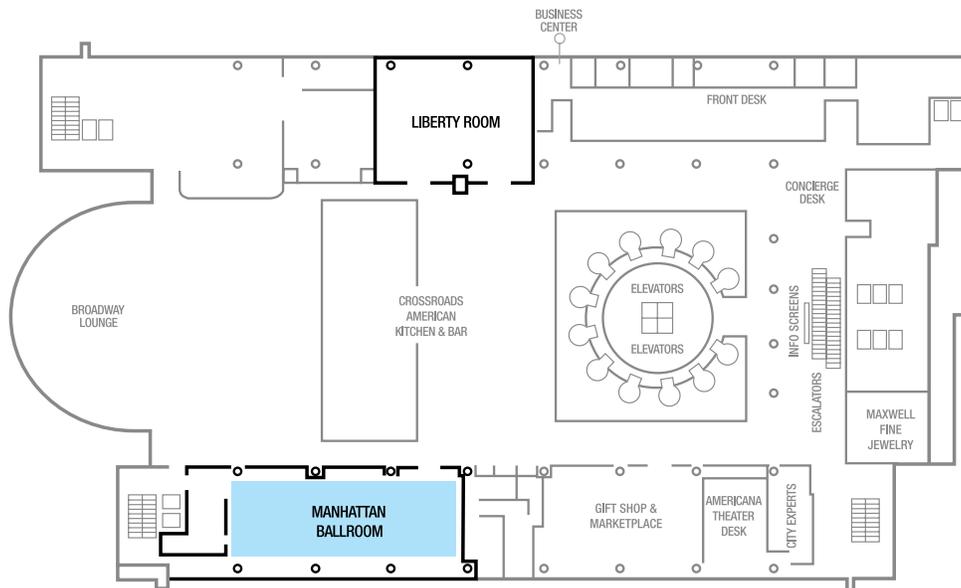
Founded in 1997, Frommer Lawrence & Haug LLP (FLH) is a full-service, intellectual property law firm with over 80 attorneys and scientific advisors having offices in New York, Washington, D.C. and Seattle. We work collaboratively with our clients to create cost effective and efficient global brand protection strategies. From trademark selection and acquisition to enforcement FLH delivers value to our domestic and international clientele managing all aspects of their trademark portfolios. We are sensitive to the costs and risks associated with litigation and attempt, whenever possible, to resolve issues on a negotiated basis. However, when litigation is the only option, FLH's litigators vigorously enforce our client's rights. FLH also has extensive experience in conducting valuation and due diligence analysis of IP assets for our clients, and in maximizing the financial value of these assets in such transactions.

Floor Plan

Seventh Floor



Eighth Floor



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Kong**

**136th Annual Meeting
May 10–14
2014**

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