

## Oracle – agenda, delegate list & table plan

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### **Topic: Deciding whether merger/acquisition is the right strategy?**

#### **Leading the debate:**



#### **Tim Hastings, Nelsons**

Tim Hastings is Chief Executive of Nelsons. He co-founded the firm in 1983 and was its Managing Partner from 1988 - 2002, since when he has been CEO with specific responsibility for strategic planning, change management, mergers, acquisitions and financial management.

In 1999/2000 Tim led Nelsons through the acquisition of 7 firms in Nottingham, Leicester and Derby, emerging as a regional heavyweight turning over £17m and employing over 250 staff. Since 2000 the firm has acquired 3 more practices. In 2006 the firm disposed of its nationally respected Criminal Law team to concentrate on the fast growing Commercial and high net worth private client bases.



#### **Simon Slater, First Counsel Consulting Ltd**

Having spent 10 years in the (sales) school of hard knocks with SmithKline Beecham and Pfizer, and a fascinating spell in business-to-business brand management with Swedish multinational SCA, Simon became one of the early pioneers of professional service firm management in 1989.

Over the next 15 years he worked with the boards of leading practices - DTZ Group plc, Charles Russell LLP (as the first law firm COO), Eversheds LLP and Taylor Wessing LLP. During this time he developed a reputation for bringing a refreshingly pragmatic approach to the leadership and management of professional practices, be they publicly quoted or private partnership.

As Managing Director of First Counsel Consulting Limited, Simon now provides strategic advice, close counsel and practical support to legal and other professional service firm leaders. He also holds a number of non executive directorships in other industries.

#### **Round the table:**

- Sarah Farrand, Marketing Manager, **Rothera Dowson**
- Sarah King, Partner, **PJH Law**
- Stephen Pearson, Partner, **Freeth Cartwright**
- Mark Slade, Managing Partner, **Fidler & Pepper**
- John Stobart, Partner, **Harvey Ingram**
- Claire Taylor, Marketing Manager, **Actons**
- Carl Weston, Head of Marketing, **Flint Bishop**

#### **Organisers:**

- Maggie Taylor, Principal, **Prima PR & Marketing**
- Mandi Short, Partner, **The Progressive Business Group**

**Running order:**

12:00 – 12:15pm Arrivals, drinks, meet and greet  
12:15 – 12:30pm Starters served and welcome - Maggie Taylor, Prima PR – followed by roundtable introductions  
12:30 – 12:40pm The law firm’s perspective – Tim Hastings, Nelsons  
12:40 – 12:50pm The consultant’s perspective – Simon Slater, First Counsel Consulting  
12:50 – 1:40pm Structured discussion over lunch  
1:40 – 1:50pm Summing up - Mandi Short, The Progressive Business Group  
1:50 – 2:00pm Photography outside  
2:00pm Close

**Round the table**

**Is merger/acquisition the right strategy?** - do professional firms have a clear vision, a strong strategy and is their culture right for a merger or acquisition? How do firms determine their fit with another and what is the attraction for each party, how important is this?

**Internal communications** - how do you decide on the ‘merged’ name, logo & brand values, manage the politics and gain buy-in from employees, encouraging client sharing & cross selling?

**External communications** – how do you handle the effect on the merged client base, how will it be seen by other stakeholders, who controls the release of information, how do you keep the communications process tight and manage the message if the merger doesn’t go ahead?

**Seating plan:**

	Stephen Pearson Freeth Cartwright	Claire Taylor Actons Solicitors	
Sarah Farrand Rothera Dowson		Carl Weston Flint Bishop	
Simon Slater First Counsel		Maggie Taylor Prima PR	
Mandi Short The Progressive Business Group		Tim Hastings Nelsons	
Mark Slade Fidler & Pepper		Sarah King PJH Law	
	John Stobart Harvey Ingram	Jo Sandall Prima PR	