



USLAW NETWORK 2023 COMPREHENSIVE CLIENT INVITATION PROCESS

In 2016/2017, USLAW NETWORK launched the Comprehensive Client Invitation Process (CCIP) which uses a coordinated invitation approach for all USLAW events, including the two semi-annual Client Conferences, the USLAW Women's Connection and the previously known Client Exchanges. The benefits of CCIP include streamlining the invitation process for member attorneys, clients receiving earlier invitations to allow for better planning, and a commitment to ensure the right clients are being invited to the right USLAW events every time.

As a result of COVID, CCIP was suspended in 2020, 2021 and 2022; however, is being re-instituted for 2023 USLAW events. Note: Since CCIP was created, USLAW has transitioned (with one exception – Transportation) from Client Exchanges to Forum. Forums were not originally included in the CCIP process but will be included for 2023.

To ensure the success of the CCIP, USLAW requires effort by our member firms, practice group leadership and USLAW staff. Below is the calendar for client invitations to 2023 USLAW events.

1. **July 21, 2022** - USLAW will announce to its membership the full schedule of events for 2023. This will include two semi-annual Client Conferences, the USLAW Women's Connection, and all Forums.
2. **August 1, 2022** – USLAW will provide each member firm a complete list of active clients in the USLAW client database that their firm/attorneys serve as primary relationships. The database will include proposed recommendations by Roger Yaffe, USLAW CEO, for 2023 invitations to CCIP events.
3. **August 15, 2022** – Deadline for all member firms to notify USLAW of the Forums they will commit to in the following year. Commitment requires pre-event and post-event financial contribution regardless of eventual participation. *Currently, there is no minimum number of Forums required for firms to participate in.*
4. **October 1, 2022** – Deadline for all member firms to return their completed client lists to USLAW with the following:
 - a. Clients removed from the active client database.
 - b. Clients still active however removed from consideration for 2023 event invitations.
 - c. Changes to USLAW proposed event invitations.
 - d. New client contacts added with proposed event invitations.
5. **November 1, 2022** – Deadline for all USLAW practice groups expanded leadership and/or review committees to review clients tied to their group events and make recommendations for any changes to individual invitations.

6. **November 1, 2022** – USLAW contact partners, managing partners, marketing directors, and client relationship attorneys with at least one client invited to a 2023 event notified of their firm’s invitations. If a client relationship attorney would like to notify his/her clients of their upcoming invitations prior to USLAW doing so, he/she has until November 14.
7. **November 14, 2022** - All clients receiving at least one event invitation in 2023 to receive an email from Roger Yaffe informing them of the event(s) they are invited to and encouraging them to save the dates. One page Save the Date PDF for each event provided as attachments. Relationship attorney(s) to be copied on email.
8. **Four months Prior to Each 2023 CCIP Event** – Clients to receive their formal invitation/registration form from USLAW. Invitations will be sent by Roger Yaffe (USLAW) with a copy to relationship attorney(s).

Company Offer Invitations

Certain high-value client companies have multiple personnel who can be invited to multiple events. These clients, in some cases, want to manage who receives the invitations. USLAW and the relationship attorneys will identify these client companies and speak to the lead client contact with the relationship attorney(s) to address who from the client's company should receive invitations and to which events. USLAW will then advise the client how many invitations the company will receive for each event.

Additional Notes

1. USLAW is anticipating only one client exchange in 2023 (Transportation and Logistics). This event is for future leaders and smaller/regional transportation companies. The invitation process will be managed through USLAW but will not be included in the CCIP process.
2. Member firms will have access to their specific client submissions throughout the year with an opportunity to update contact and name information changes as necessary.
3. If a relationship attorney from a firm leaves a firm and has clients selected for future invitations, the firm will have the opportunity to pull the client from future invitations or transfer the relationship name to another attorney.
4. This process will not preclude new invitations to be made for events throughout the year. Member firms will be able to add new invitations for client contacts who were not previously submitted. This will allow member firms to engage new client contacts throughout the year in case of changes within the company.
5. If a client was selected for event(s) but cannot attend those events but is interested in others, consideration by USLAW and the relationship attorney will be made to swap events.
6. New member firms that join after the CCIP client vetting process will be provided an opportunity to submit clients for the remaining events to be held that year.