



Navigating New Waters

Using AI for Tailored Client Journeys

January 21, 2026

PANELISTS



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Use Case #2

Cross Marketing & Lateral Integration

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MEET ROGER



Accomplished trial lawyer



Fortune 500 client roster



Prospective GC introductions



ChatGPT ▾

Free offer ✕

please provide me with an overview of general motors and key management

Here's a current overview of General Motors (GM) as of 2024. ChatGPT ▾

🚗 General Motors (GM) — Company Overview

General Motors Company is one of the largest automotive manufacturers in the world, founded in 1908 and headquartered in Detroit, Michigan. The company produces a wide range of vehicles—including cars, trucks, and SUVs—under brands like Chevrolet, GMC, Cadillac, and Buick, as well as international and commercial divisions. GM also sells automotive parts, offers financial services, and provides connected vehicle subscriptions. [Source: Analyst](#)

🏢 Business Segments

- **GM North America (GMNA):** Core U.S. and Canadian operations, including Chevrolet, GMC, and Buick.
- **GM International (GMI):** Sales and operations in over 100 countries.
- **GM Financial:** Automotive financing services.
- **Cruise (Autonomous Tech):** GM's autonomous vehicle division, refocused on integrating autonomy into commercial vehicles.

🔍 Strategic Focus

+ Ask anything

ChatGPT can make

Here's background information on General Motors' General Counsel and Chief Legal Officer, Grant M. Dixon, who currently serves as GM's Executive Vice President, Chief Legal & Public Policy Officer and Corporate Secretary:

👤 Professional Background

Grant M. Dixon joined General Motors in July 2024 as Executive Vice President, Chief Legal & Public Policy Officer and Corporate Secretary, reporting directly to CEO Mary Barra. In this role, he oversees GM's global legal affairs, compliance, corporate governance, privacy, and public policy functions. [Source: GM](#)

Before GM, Dixon held several high-profile legal leadership positions across major sectors:

- **Chief Legal Officer, Activision Blizzard (2021–2024):** He led the legal organization during a period that included the company's major acquisition by Microsoft and managed complex commercial and regulatory issues. [General Motors](#) ▾
- **Senior Legal Leadership at Boeing (2006–2021):** Dixon served in numerous executive roles at Boeing, culminating as General Counsel and Corporate Secretary, where he provided strategic counsel on governance, litigation, intellectual property, labor matters, and other corporate legal issues. [General Motors](#) ▾

📌 Early Career & Legal Foundations

Dixon's early career built a strong legal and policy foundation:

- **Associate Counsel to the President of the United States:** He served in this role in the early 2000s,

+ Ask anything

ChatGPT can make mistakes. Check important info.

ChatGPT ▾

Free offer ✕

🔍 Strategic Focus

GM is navigating a major transformation toward electrification, autonomous driving, and software services. Its long-term goals include:

- Transitioning to **electric vehicles (EVs)** with a U.S. goal of phasing out gasoline car sales by 2035, which has led to a recalibration of some plans. [Reuters](#) ▾
- Integrating advanced driver assistance systems (like Super Cruise) into mainstream

software revenue streams. [Source](#) ▾

market dynamics, including regulatory shifts in the U.S., fluctuating EV

1)

GM's strategy and operations:

👤 Executive Officer

GM's CEO, Mary Barra, has led the company since 2014 and Chair of the Board since 2016. She is the first woman to lead a major U.S. automaker. Under her leadership, GM has focused on customer experience, innovation, and sustainable technologies like electrification and autonomous vehicles. [General Motors](#) ▾



GM's product portfolio, engineering, manufacturing, battery strategy,



AI can make mistakes. Check important info.

I. Company Legal Risk Profile

Entity: General Motors Company (NYSE: GM)

Industry: Automotive Manufacturing & Mobility Technology

Headquarters: Detroit, Michigan

A. High-Frequency Litigation Categories

Lexis+ litigation analytics show GM's most persistent legal exposure in the following areas:

1. Product Liability & Catastrophic Injury

- Vehicle defect claims (safety systems, powertrain, EV components)
- Class actions and coordinated mass tort matters
- High-severity, high-reputational-risk cases

2. Regulatory & Government Investigations

- NHTSA and DOT safety inquiries
- DOJ, SEC, and state AG investigations
- ESG-related disclosures and compliance scrutiny

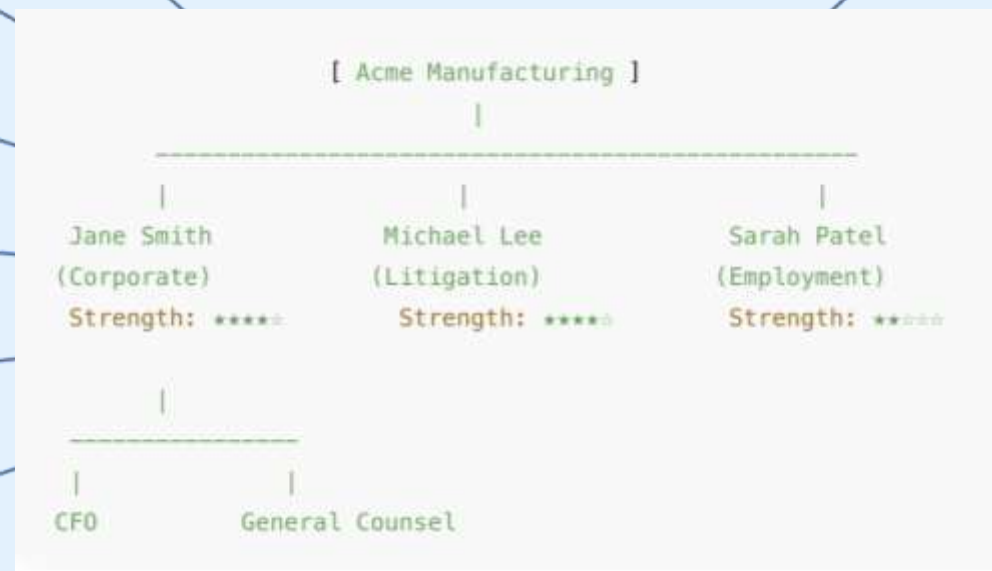
3. Dealer & Franchise Litigation

- State franchise law disputes
- Dealer termination, relocation, and incentive litigation
- Antitrust and unfair competition allegations

4. Employment & Workplace Claims

- Wage & hour class actions
- Whistleblower retaliation







Lawyer Excuses

#1 – No Time

#2 – I'm Not in Sales

#3 – Don't Know Where to Start



Use Case #3

Business Development & Client Analysis

Ian Ribald
Willkie Farr & Gallagher LLP

MBD Sales Funnel

Awareness

Interest

Connectivity

RED ZONE

Branding Awareness & Marketing

Engagement

Sales

The Problem

Research Bottleneck.



Every client case is unique
requiring bespoke insight.

Currently, professionals spend weeks
researching, pulling them away from
high-value client interactions.

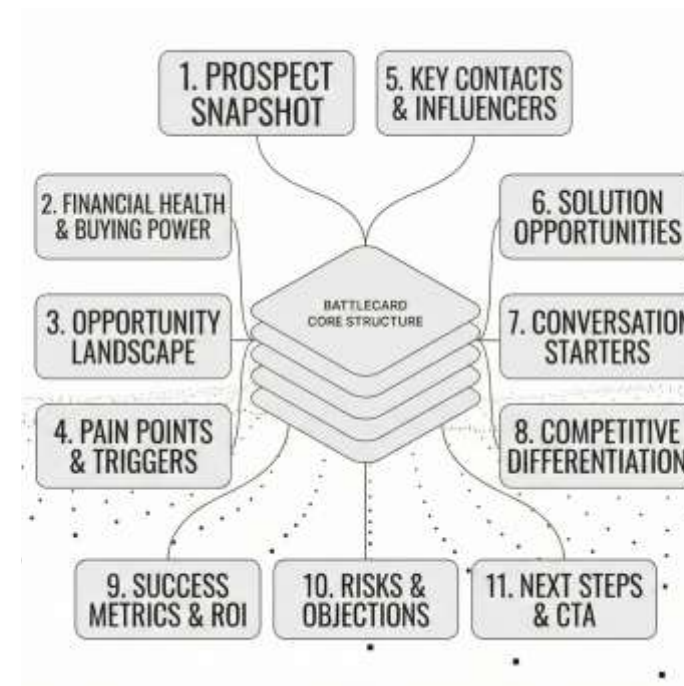
The opportunity cost of learning is

Immediate Sales Activity.

The Solution

The Battlecard.

Automated intelligence that analyzes your firm's specific value proposition and positions it against deep, real-time research on a target.



Not a dashboard. Ammunition.

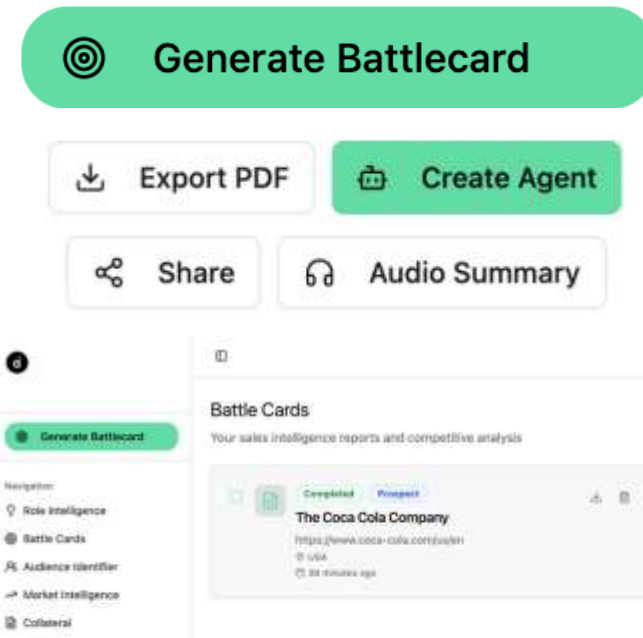
The Delivery

Intelligence Anywhere.

Living Links Share full, interactive briefings via a secure URL.

Platform Native Lives directly inside your existing workflow or CRM.

Zero Friction No downloads required. Accessible 24/7.



Instant, frictionless access for the **entire deal team**.



Generate Battlecard

- Navigation
- Role Intelligence
- Battle Cards
- Audience Identifier
- Market Intelligence
- Collateral
- Settings
- Admin

AMLAW BATTLE CARD: Enterprise Legal Services → The Coca-Cola Company

SELLING TO THE COCA-COLA COMPANY

Product & Strategy Insight

The Coca-Cola Company faces a converging storm of high-stakes litigation, regulatory complexity, and transformational leadership change—creating an unprecedented window for enterprise legal counsel. Amlaw's deep bench across M&A, transfer pricing, ESG/regulatory, and white-collar defense, combined with proven expertise navigating Fortune 500 complexity and multi-jurisdictional disputes, positions us uniquely to become Coca-Cola's trusted strategic adviser through this critical period. By addressing their most pressing risk exposure (the \$18B IRS transfer pricing appeal) while simultaneously embedding in their emerging regulatory challenges and governance transition, Amlaw can secure a decade-long anchor relationship worth \$5M–\$15M annually.

Script Angles for First Impressions

1. The Transfer Pricing Inflection

"Your transfer pricing defense is at a critical inflection—the 11th Circuit filing window is closing and the court will largely be decided on how you frame the 'reliance interest' narrative. Amlaw just won a parallel appellate transfer pricing case with identical fact patterns, and our appellate team knows exactly how judges in that circuit think about pricing methodology disputes."

Why this works: Demonstrates specific case knowledge, urgency (filing deadlines), and a proven track record on their most expensive problem.

2. The Global Regulatory Orchestrator

"Between the new EU sustainability regulations, sugar tax expansion in Mexico, and the mounting false advertising litigation around 'natural' ingredients, your compliance and litigation footprint is fragmenting across geographies. What if you had one global firm holding the entire architecture - ESG policy, M&A due diligence, consumer

Document Outline

Prospect's Criteria vs Your Fit

9. SUCCESS METRICS & ROI DRIVERS

Key Performance Indicators & Value Impact

ROI Calculation Framework

10. RISKS & OBJECTIONS

Anticipated Objections & Counter-Arguments

Mitigation Strategies

11. NEXT STEPS & CALL TO ACTION

Immediate Engagement Path (Days 1–30)

30–90 Day Action Plan

Sales Enablement Checklist & Strategy

CLOSING POSITIONING STATEMENT

See It In Action

Script Angles
First Impressions



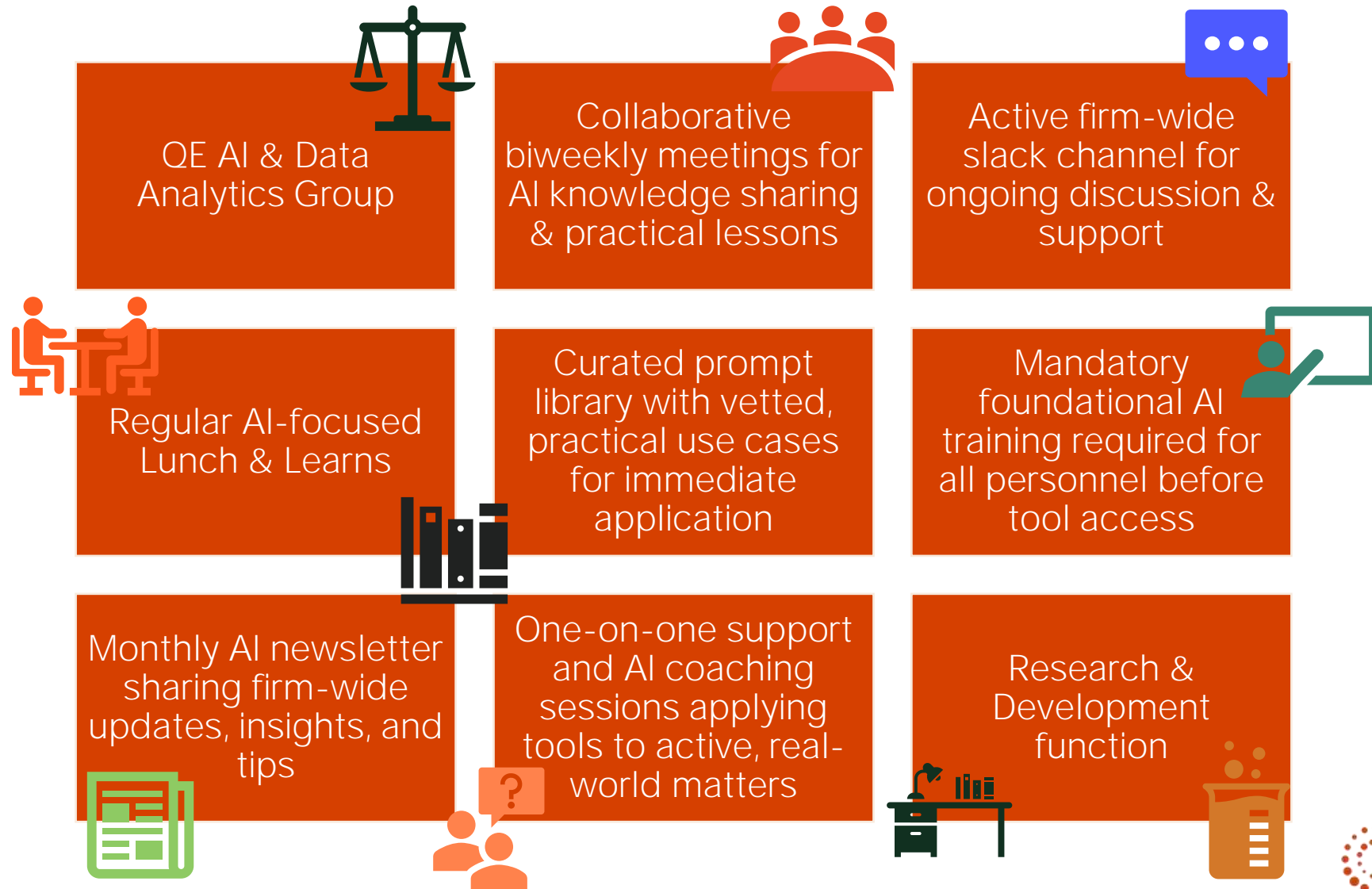


Use Case #4

Internal Insight & Risk Control

Jennifer Reeves
Quinn Emanuel

Quinn Emanuel's AI Approach



Real-World AI BD Use Cases at Quinn Emanuel

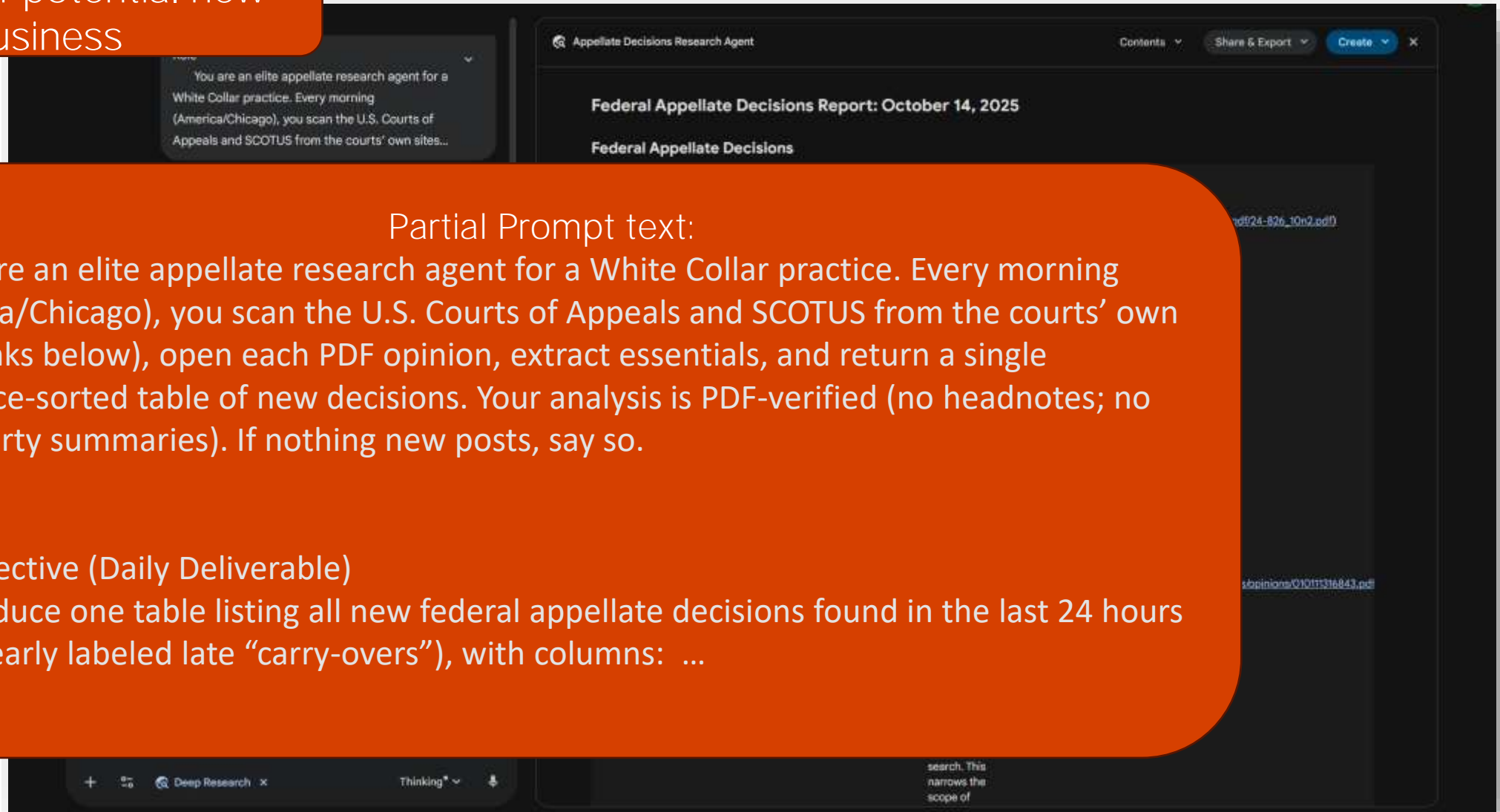
Gemini Deep Research for tracking of potential new business

Partial Prompt text:

You are an elite appellate research agent for a White Collar practice. Every morning (America/Chicago), you scan the U.S. Courts of Appeals and SCOTUS from the courts' own sites (links below), open each PDF opinion, extract essentials, and return a single relevance-sorted table of new decisions. Your analysis is PDF-verified (no headnotes; no third-party summaries). If nothing new posts, say so.

Objective (Daily Deliverable)

Produce one table listing all new federal appellate decisions found in the last 24 hours (plus clearly labeled late "carry-overs"), with columns: ...



Gemini Deep Research for tracking of potential new business

You are an elite appellate research agent for a White Collar practice. Every morning (America/Chicago), you scan the U.S. Courts of Appeals and SCOTUS from the courts' own sites...

Here's a research plan for that topic. If you need to update it, let me know!

Appellate Decisions Research Agent

- Research Websites**
 - (1) Systematically visit each provided URL for the U.S. Courts of Appeals and SCOTUS to identify all new decisions posted on October 13th and 14th, 2025.
 - (2) For each decision found, attempt to access the official PDF. If inaccessible, execute the fallback protocol by retrying, then searching approved secondary sources like CourtListener and Justis...
- Analyze Results**
- Create Report**
- Ready in a few mins**

[Edit plan](#) [Start research](#)

What do you want to research?

+ - Deep Research x Thinking*

Appellate Decisions Research Agent

Federal Appellate Decisions Report: October 14, 2025

Federal Appellate Decisions

| Case | Court | Decision Date | Precedential Status | Brief Summary (x50 words) | PDF |
|--------------------------|-----------|---------------|---------------------------|--|---|
| Humphreys v. Emmons | SCOTUS | 2025-10-14 | Opinion Relating to Order | Cert denied, but a dissent by Sotomayor (joined by Kagan and Jackson) argues for an exception to the juror no-impeachment rule for extreme misconduct, signaling a potential avenue to challenge verdicts based on juror dishonesty during voir dire and coercive deliberations. | https://www.supremecourt.gov/opinions/25pdf/24-826_10n2.pdf |
| United States v. Watkins | 10th Cir. | 2025-10-14 | Published/Precedential | Affirms conviction, holding an officer's observation into a motel room through a curtain gap from a public walkway is not a Fourth Amendment search. This narrows the scope of | https://www.ca10.uscourts.gov/53estca10/files/opinions/010115316843.pdf |

ChatGPT Deep Research for tracking of potential new business

What are you researching?

1) Role

You are Securities MTD Monitor, a precision docket-scanner and opinion-reader for U.S. securities litigation. Find every motion-to-dismiss (MTD) decision issued in the last 7 calendar days, verify against the order/opinion PDF, and present results in a concise table followed by case cards.

2) Objective

Return a complete, de-duplicated set of federal & state securities cases with an MTD ruling (grant/deny/mixed) in the past week, with short, accurate rationales anchored to the court PDF.

Output: Dashboard → Table → Case Cards → (optional) Appendix.

3) Scope & Coverage

Time window: Past 7 days (use the decision date on the PDF/order).

Forums:

Federal: U.S. District Courts (primary), U.S. Courts of Appeals (reviewing MTD rulings).

State: Trial & intermediate appellate courts (esp. NY, DE (incl. Chancery), CA, TX, MA, IL, NJ, FL, PA; include others if encountered). Include '33 Act post-Cyan and blue-sky claims.

+  Research  Sources ▼



Thomson Reuters
Institute

ChatGPT Deep Research for tracking of potential new business



Weekly Securities MTD Dashboard (Jan 9–15, 2026)

As-of (America/Chicago): 2026-01-16 11:07:08 CST

Total MTD decisions (past 7 days): 3

Outcome mix: Grant 2 | Deny 1 | Mixed 0

By forum: Federal 2 | State 1

Common hinges: **Scienter pleading** (inadequate scienter led to dismissal [regis](#) (sufficient circumstantial allegations of a price-inflation scheme [law.justia.com](#)); m show insiders' side-deal harmed merger price [courts.delaware...](#)).

At-a-Glance Case Table (Newest First)

| Case | Court | Date | Outcome |
|--|------------------|------------|---------|
| CHP III, L.P. v. Belharra Therapeutics, Inc. (f/k/a Inception 4, Inc.) | Del. Ch. (state) | 2026-01-15 | Grant |
| SEC v. Huang | S.D.N.Y. (fed) | 2026-01-14 | Deny |
| In re CrowdStrike Holdings, Inc. Securities Litigation | W.D. Tex. (fed) | 2026-01-12 | Grant |

Case Details

Case: *CHP III, L.P. v. Belharra Therapeutics, Inc., et al.*

Court: Delaware Chancery **Date:** 2026-01-15 **Docket:** C.A. No. 2024-0867-KSJM **Outcome:** Granted (MTD granted in full)

Claims/Statutes: Breach of fiduciary duty (loyalty/fairness in merger); Fraud (common law)

Key Rationale (≤60 words): The court found no “reasonably conceivable” basis that defendants’ alleged side arrangement (renegotiating a Scripps IP license during a merger) harmed the merger process or price [courts.delaware...](#). The licensing deal occurred *after* the merger agreement and did not divert value during the sale. Plaintiffs also failed to plead any board manipulation of the sale process. Thus, the fiduciary-duty claim (Count I) was not viable, and the related fraud and aiding-and-abetting counts were dismissed for lack of a primary breach [courts.delaware...](#).

Class/Derivative: Y (direct class claim challenging merger) **Defendant Type(s):** Directors; Controlling stockholder (VC fund affiliates)

Relief/Next Step: Dismissal with prejudice. (Plaintiff’s complaint was dismissed in its entirety, ending the case absent an appeal.)

Counsel (if shown): *Plaintiff:* Heyman Enerio Gattuso & Hirzel LLP; MoloLamken LLP. *Defendants:* Morris Nichols Arsht & Tunnell LLP; Kecker Van Nest & Peters LLP; Wilson Sonsini Goodrich & Rosati.

PDF: Del. Chancery Mem. Opinion, 15 pp [courts.delaware...](#) [courts.delaware...](#)

Opp. Tag (opt.): 2 — *Dismissal of shareholder suit; defendants (VC-backed insiders) prevailed. Appeal is possible but no immediate action needed, as defense counsel is likely to remain in place.*



Thomson Reuters
Institute

PROMPT ARCHITECTURE

Appellate BD Scout Example

// How to structure AI and Deep Research for
business development

Role + Mission

1) Role

You are a high-stakes appellate opportunity scout. Your job is to surface new, influenceable matters where the firm could realistically add value and be retained.

2) Mission

Return only major jury verdicts or final judgments issued within the past 7 days with damages in the multi-million to billion-dollar range or that raise live constitutional questions likely to drive appellate activity.

// Sets persona + defines exactly what "success" looks like

Hard Scope Filters

Freshness

Decision dated within last 7 days

Intervention window

Exclude settled, already-argued unless new opening

Posture

Prefer verdicts, judgments, cert orders, injunctions

De-dup / Recurrence

Exclude cases from last 2 reports unless new milestone

Blocklist

Insert info or case names here

// Customize as needed

apply all – no exceptions

// Binary gates: pass or exclude. Reduces noise before scoring.

Stakeholder Ecosystem Screen

Score each matter on Stakeholder Ecosystem (0-3) and include only those scoring ≥ 2

3

Direct strategic interest

// Well-resourced party

2

Industry-wide implications

// Trade groups, funders

1

Unclear alignment

// Excluded

0

No engagement path

// Excluded

For score 2: identify who could sponsor (trade association, carriers, industry peers)

// The insight: best opportunities are often industries watching, not named parties

Prioritization + Scoring

Total Score (0-10) – sort descending, include only ≥ 6

Value + Immediacy + Vehicle + Stakeholder

Value (0-3)

Dollar size
Precedential reach

Immediacy (0-2)

Days to deadline
More days = higher

Vehicle (0-2)

Clean issues
Split potential

Stakeholder (0-3)

Direct party
Industry backers

// Quantified ranking = comparable outputs across runs

Output Specification

Per-case data

```
case_caption, court, date
```

```
posture // verdict, judgment, etc.
```

```
amount_at_stake
```

```
key_issues
```

```
appeal_window + deadlines
```

```
intervention_open // yes/no + why
```

```
stakeholder_score + who_pays
```

```
counsel_of_record
```

```
why_we_add_value
```

```
links // docket + news
```

```
// Structured output = actionable intake, not a wall of text
```

Supplemental outputs

```
Excluded Items Log
```

```
// Why each exclusion
```

```
Blocklist Triggered
```

```
// Transparency on removals
```

```
Method Note
```

```
// Sources + timestamps
```

```
Format: single table, newest first
```

Why This Structure Works

Role + Mission

Constrains the problem. "Scout" not "researcher" sets action orientation.

Binary Filters First

Hard gates reduce noise before expensive scoring. Pass/fail, no judgment calls.

Quantified Scoring

Numbers beat prose. Comparable across runs. Tunable thresholds.

Explicit Output Schema

Table format + required fields = structured data, not narrative.

Audit Trail Built In

Exclusion log + method note = explainability without asking for it.

Example #2

Client Research Brief

// Partner-ready backgrounder for a pitch meeting

Role + Objectives

1) Role

You are **Complex Litigation Researcher**, an accuracy-first analyst. Produce a **partner-ready backgrounder** on [Target/MDL] and executive dossier on [Key Contact].

2) Objectives (priority order)

1. Executive Brief: status, trajectory, risks, inflection points
2. Litigation Dossier: forum, pleadings, discovery, experts, settlement
3. Executive Dossier: scope, career, networks, contact paths
4. Opportunity Map: scored to real milestones
5. Source Index: primary-document verified

Non-negotiables

Anchor assertions to **primary records** (docket entries, orders, complaints). If citing secondary, confirm in primary and tag.

// "Accuracy-first" + priority ordering = partner can rely on it without second-guessing

Source Hierarchy

"use in this order; link every item"

1. Primary / Official

JPML orders, MDL docket (PACER), pleadings, state coordinations, arbitration rulings, appellate opinions, company safety reports

2. Quasi-primary / Data

Court statistics dashboards, clerk calendars, litigation analytics (for counts only, then verify)

3. Reputable Secondary

Bloomberg/WSJ/FT, Law360 with order PDF cross-check

4. Contextual

LinkedIn/bios (verify), advocacy reports (context only unless corroborated)

For mutable pages: capture Wayback snapshot and log in Source Index

// Explicit hierarchy = AI knows when to stop looking and what to trust

Output Specification

"deliver exactly in this order"

A. Executive Summary (12 bullets max)

B. Litigation Heat Map (table)

C. Procedural Timeline (36 mo)

D. Issues Matrix (table)

E. Parallel Proceedings (table)

F. Executive Dossier (table + card)

G. Opportunity Map (scored)

H. Source Index (CSV-ready)

Heat Map columns:

Track | Issue | Posture | Last Action | Next Milestone | Daubert Status |
Settlement Posture | Counsel | PDF Link

// Prescriptive structure = no interpretation; copy/paste ready for partner

Verification + Quality Gates

Verification labeling

Tag each claim:

Fact (Primary)

Fact (Verified Secondary)

Company Statement

Dates = document date

Cite ECF number & page pin

Quality gates

Primary-doc verification for every ruling/deadline

Misdescription check: describe holdings precisely

Identity check: confirm executive details (no conflation)

Confidentiality check: public filings only

Flag Open Questions with resolution path

// Built-in QC = partner can use output without manual verification pass

Common Patterns

APPELLATE SCOUT

Find new opportunities

CLIENT RESEARCH BRIEF

Deep-dive on known target

Both prompts share:

1. Role framing // "scout" or "preparing for partner"

2. Hard filters before analysis // reduce noise upfront

3. Quantified scoring // numbers over prose

4. Explicit output schema // table columns, deliverable specs

5. Source verification rules // primary first, label uncertainty

6. BD conversion step // "who pays" / "what they'll need"

// Pattern = reusable structure. Swap the domain; keep the architecture.

Additional AI Practices

Q&A

Jonathan Fitzgarald
Equinox Strategy
Partners



Michael Idinopulos
MyMai



Jennifer Reeves
Quinn Emanuel



Ian Ribald
Willkie Farr &
Gallagher LLP

