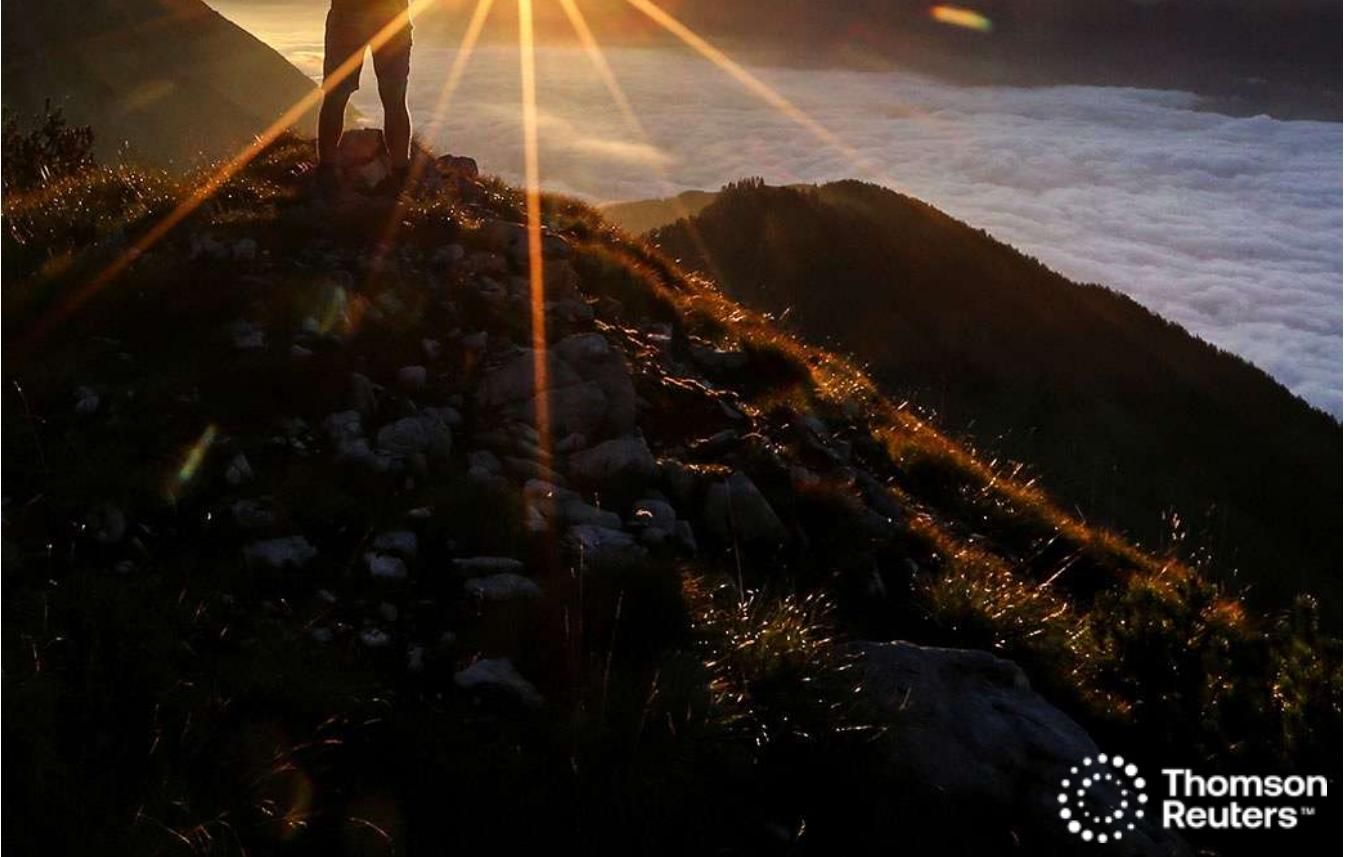




Navigating New Waters

Using AI for Tailored Client Journeys

January 21, 2026



PANELISTS



Jonathan Fitzgarrald
Equinox Strategy
Partners



Jennifer Reeves
Quinn Emanuel



Michael Idinopoulos
MyMai



Ian Ribald
Willkie Farr &
Gallagher LLP



Use Case #2

Cross Marketing & Lateral Integration

Jonathan Fitzgerald
Equinox Strategy Partners



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) Company

General Motors Company is one of the largest automakers in the world, founded in 1908 and headquartered in Detroit, Michigan. The company manufactures a wide range of vehicles—including cars, trucks, and SUVs—under brands like Chevrolet, GMC, Cadillac, and Buick, as well as international brands like Opel and Vauxhall. The company also sells automotive parts, offers financing options, and provides connected vehicle subscriptions.

Business Segments

- GM North America (GMNA): Core U.S. and Canadian operations
- GM International (GMI): Sales and operations in Europe, South America, and Asia-Pacific
- 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 Grant M. Dixton, who currently serves as Corporate Secretary of GM. Dixton joined General Motors in 2010 as a Senior Legal Counsel, focusing on GM's global legal affairs, corporate governance, and compliance programs. Before GM, Dixton held several legal roles at Ford Motor Company, including as General Counsel to the Board of Directors. Dixton's early career built a strong foundation in corporate law, particularly in the areas of governance, risk management, and compliance. Dixton's experience in the automotive industry, coupled with his legal expertise, has made him a key figure in GM's corporate governance structure.

Professional Background

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Chief Legal Officer, Activision Blizzard, a role that included the company's global legal operations and regulatory issues.

Senior Legal Leadership at Boeing, culminating as General Counsel to the Board of Directors.

Early Career & Legal Foundations

Dixton's early career built a strong foundation in corporate law, particularly in the areas of governance, risk management, and compliance.

Associate Counsel to the Board of Directors at Ford Motor Company.

Ask anything

Strategic Focus	GM is navigating a major transformation toward electrification, autonomous driving, and software services. Its long-term goals include:
Free offer	Transitioning to electric vehicles (EVs) with a U.S. goal of phasing out gasoline car sales by 2035, shifts have led to a recalibration of some plans. <small>Read more</small>
Grant M.	id driver assistance systems (like Super Cruise) into mainstream
ors' General Counsel and Chief Legal Officer, Grant M.	oftware revenue streams. <small>Read more</small>
the Vice President, Chief Legal & Public Policy Officer and	et dynamics, including regulatory shifts in the U.S., fluctuating EV
2024 as Executive Vice President, Chief Legal & Public	<hr/>
g directly to CEO Mary Barra. In this role, he oversees	<hr/>
e governance, privacy, and public policy functions.	<hr/>
l leadership positions across major sectors:	<hr/>
2021–2024): He led the legal organization during a period	<hr/>
on by Microsoft and managed complex commercial and	<hr/>
–2021): Dixon served in numerous executive roles at	<hr/>
and Corporate Secretary, where he provided strategic	<hr/>
al property, labor matters, and other corporate legal	<hr/>
cy' ↓ 'dation:	<hr/>
United States: He served in this role in the early 2000s,	<hr/>

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



[Acme Manufacturing]

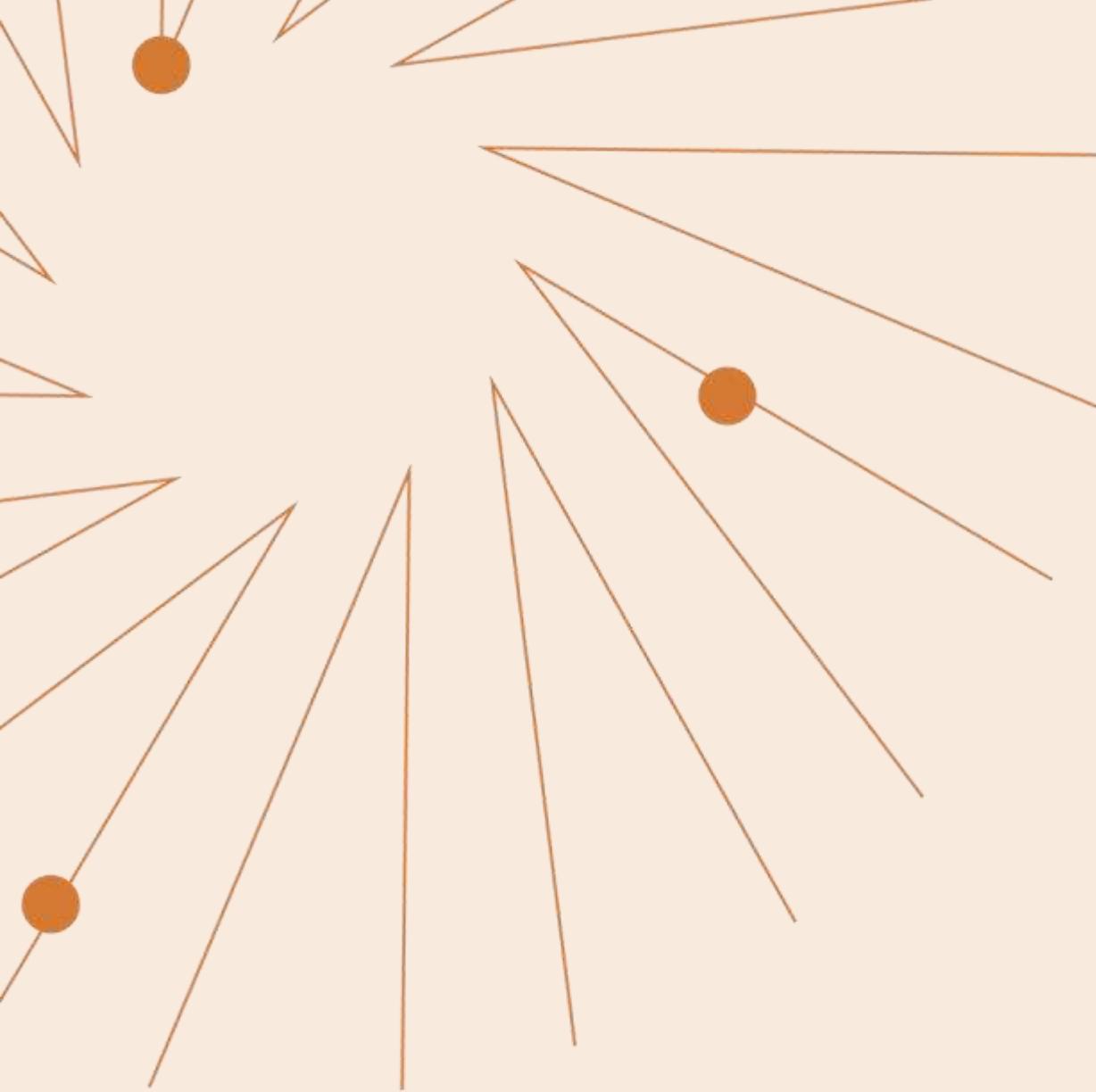
Jane Smith
(Corporate)
Strength: ****

Michael Lee
(Litigation)
Strength: ****

Sarah Patel
(Employment)
Strength: ***

CFO

General Counsel



Lawyer Excuses

#1 – No Time

#2 – I'm Not in Sales

#3 – Don't Know Where to Start

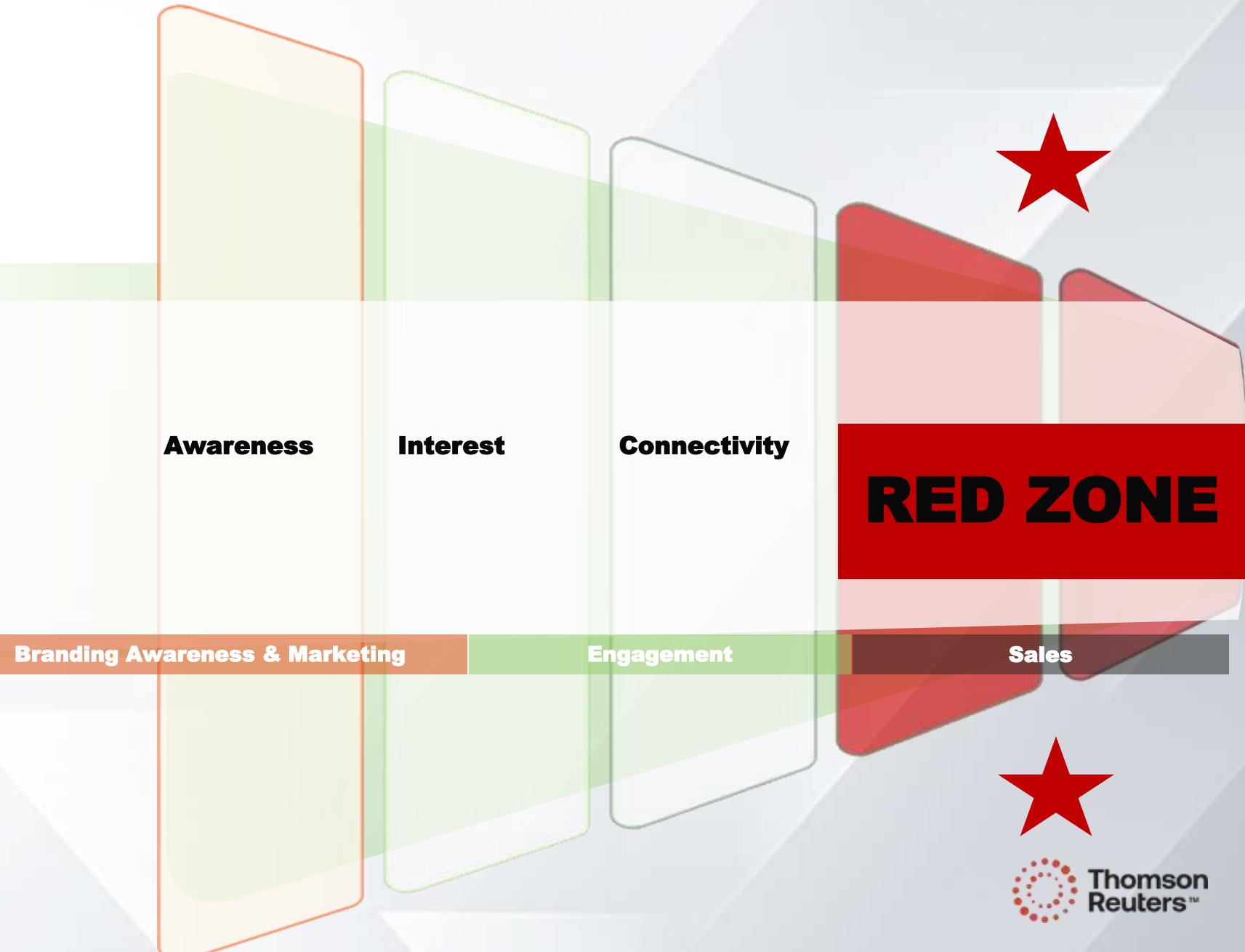


Use Case #3

Business Development & Client Analysis

Ian Ribald
Willkie Farr & Gallagher LLP

MBD Sales Funnel



The Problem

Research Bottleneck.



Every client case is unique
requiring bespoke insight.

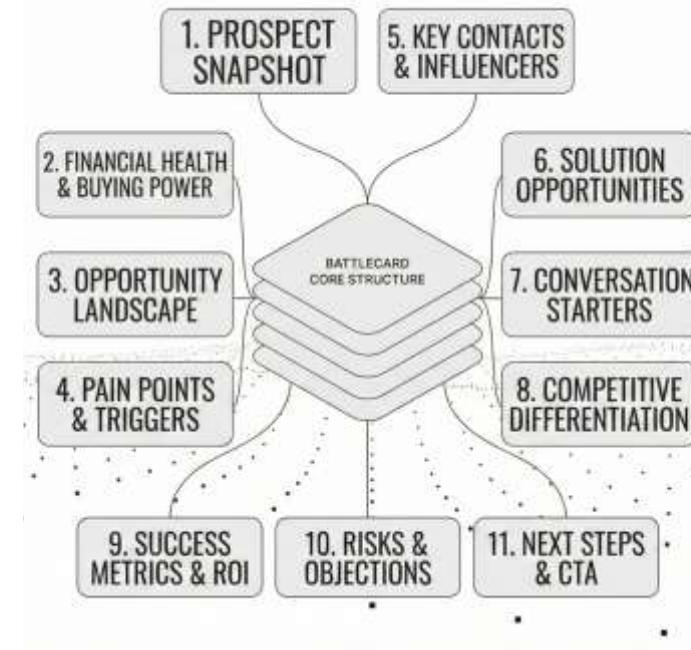
Currently, professionals spend weeks
researching, pulling them away from
high-value client interactions.

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.



Generate Battlecard

Export PDF

Create Agent

Share

Audio Summary

The screenshot shows a user interface for generating a battlecard. At the top, there are four buttons: 'Generate Battlecard' (green), 'Export PDF', 'Create Agent', 'Share', and 'Audio Summary'. Below these are two sections: 'Battle Cards' and 'Navigation'. The 'Battle Cards' section displays a card for 'The Coca-Cola Company' with a thumbnail, status 'Completed', and a link 'https://www.coca-cola.com/us/en'. The 'Navigation' section includes links for 'Role Intelligence', 'Battle Cards' (which is selected and highlighted in blue), 'Audience Identifier', 'Market Intelligence', and 'Collateral'.

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



Generate Battlecard

Navigation

Role Intelligence

Battle Cards

Audience Identifier

Market Intelligence

Collateral

Settings

Admin

AMLAWS 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

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...

Appellate Decisions Research Agent

Contents

Share & Export

Create

Federal Appellate Decisions Report: October 14, 2025

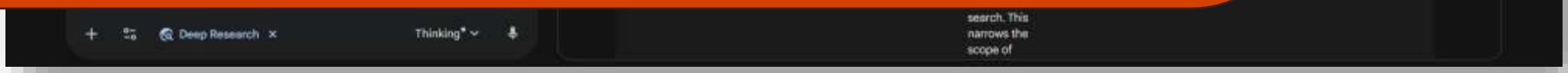
Federal Appellate Decisions

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 JustI...

More
- Analyze Results**
- Create Report**
- Ready in a few mins**

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

What do you want to research?

Start research

Thinking*

Federal Appellate Decisions Report: October 14, 2025

Federal Appellate Decisions

Case	Court	Decision Date	Precedential Status	Brief Summary (500 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/25pd/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/sites/ca10/files/opinions/01011316843.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

0

↑



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: **Sciencer pleading** (inadequate scienter led to dismissal (sufficient circumstantial allegations of a price-inflation scheme [courts.delaware...](#)); **show insiders' side-deal harmed merger price** [courts.delaware...](#)).

At-a-Glance Case Table (Newest First)

Case	Court	Date	Outcome
<i>CHP III, L.P. v. Belharra Therapeutics, Inc. (f/k/a Inception 4, Inc.)</i>	Del. Ch. (state)	2026-01-15	Grant
<i>SEC v. Huang</i>	S.D.N.Y. (fed)	2026-01-14	Deny
<i>In re CrowdStrike Holdings, Inc. Securities Litigation</i>	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 Arsh & Tunnell LLP; Keker 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

De-dup / Recurrence

Exclude cases from last 2 reports unless new milestone

Intervention window

Exclude settled, already-argued unless new opening

Blocklist

Insert info or case names here

// Customize as needed

Posture

Prefer verdicts, judgments, cert orders, injunctions

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

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

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

Common Patterns

APPELLATE SCOUT

Find new opportunities

CLIENT RESEARCH BRIEF

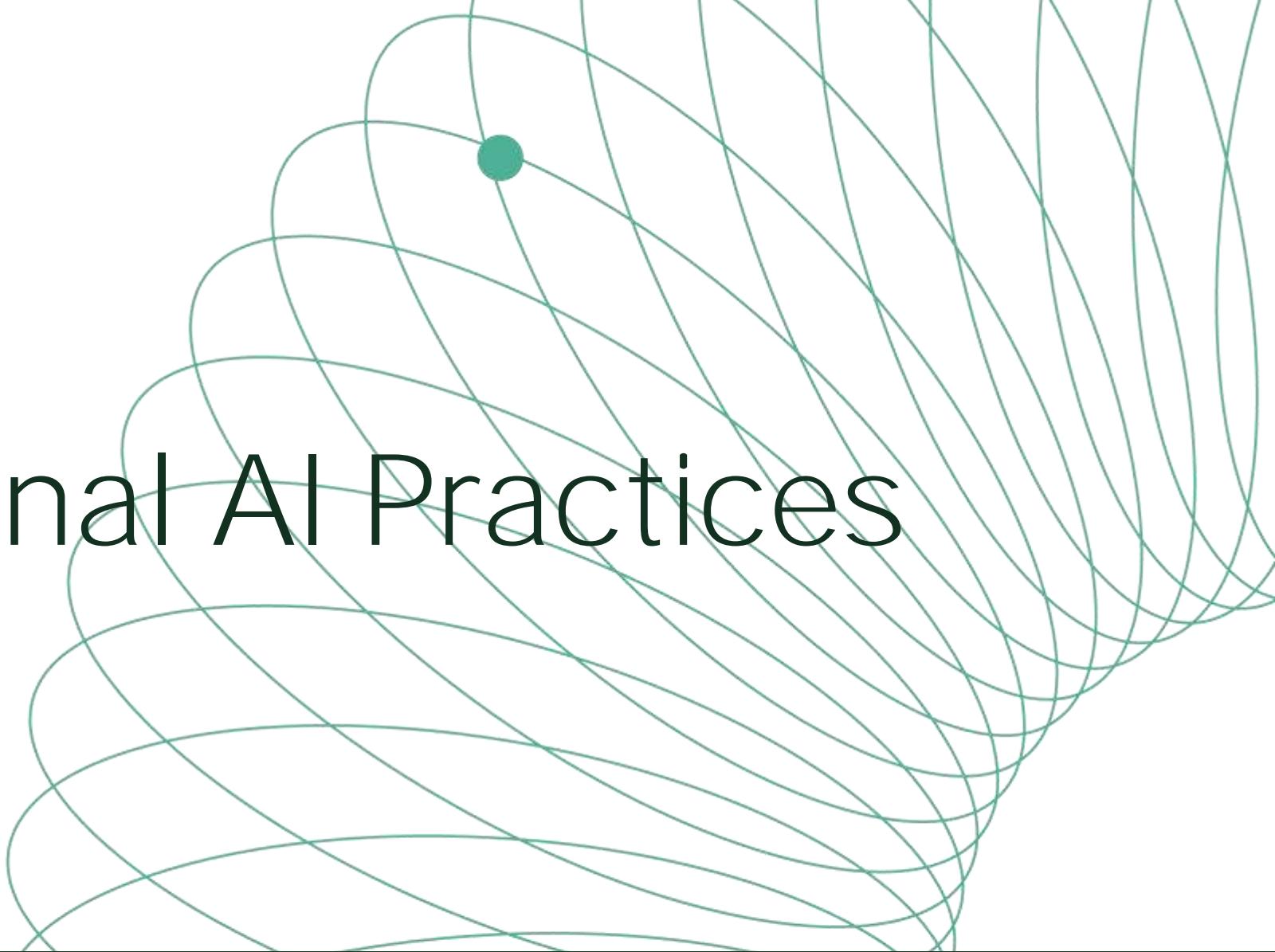
Deep-dive on known target

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

A large, abstract graphic in the bottom right corner features a central teal dot connected by numerous thin, curved teal lines that radiate outwards, creating a network or fan-like pattern against a dark teal background.

Q&A

Jonathan Fitzgarrald
Equinox Strategy
Partners



Michael Idinopulos
MyMai



Jennifer Reeves
Quinn Emanuel



Ian Ribald
Willkie Farr &
Gallagher LLP

