

Thomson Reuters Institute

# The 33rd Annual Chief Marketing and Business Development Officer Forum



Steering Strategic and Cultural  
Connection Amid the Changing  
Currents of the Legal Industry

January 21 – 23, 2026  
The Ritz-Carlton  
Amelia Island, Florida



**Thomson Reuters  
Institute**



*“We’re grateful to our attendees, speakers, and sponsors for being here and for contributing to the high caliber of this event year after year.”*



## Foreward

From January 21 through 23, 2026, Thomson Reuters Institute was proud to host the 33rd Annual Chief Marketing and Business Development Officer Forum, convening over 200 of the legal industry’s strategic growth leaders to explore “Steering Strategic and Cultural Connection Amid the Changing Currents of the Legal Industry.” This summary captures the highlights of the three-day program: pressing challenges facing law firm marketing and business development professionals, harnessing AI to personalize client journeys, building demand generation frameworks for resource-constrained environments, to developing non-equity partner programs, navigating high-stakes communications, and reimagining business models in an era of unprecedented market transformation.

Through panels, and workshops, and a keynote address, participants explored practical approaches for myriad growth and marketing strategies, such as managing client portfolios purposely, leveraging agentic AI authentically, and positioning firms for international growth. The content reflected collective expertise from CMBDOs, innovation executives, and industry thought leaders, shaping how firms create value and drive sustainable expansion. We are honored to preserve these insights in this executive summary for ongoing reference and application.



**Mike Abbott**

Head of Thomson Reuters Institute

## Casting a Wider Net: Rethinking Demand Generation for Mid-Law Business Development Teams

Mid-sized firms don't need more leads—they need the right ones. This workshop focused on smart segmentation: grouping clients by what drives their decisions, then using those insights to prioritize time and budget. Panelists shared practical ways to define segments that connect to revenue and explored blending automation with personal touches so outreach feels human. The conversation covered using CRM as a strategic tool to help lean teams move faster and make better decisions about where to focus their efforts than a constraint.

## MODERATOR



**Robin Gerard**  
Chief Marketing Officer,  
Stradling Yocca Carlson  
& Rauth LLP

## PANELISTS



**Julie Amos**  
Chief Marketing and  
Business Development  
Officer, Hinshaw &  
Culbertson LLP



**Heather Morse**  
Chief Business  
Development Officer,  
McGlinchey  
Stafford PLLC



**Ashraf Lakhani**  
Chief Marketing and  
Business Development  
Officer, Porter  
Hedges LLP



*Modern outreach pairs scalable automation with unmistakable human specificity.*

## Shoals of Success: Designing Non-Equity Partner Business Development Programs that Drive Growth and Retention

How do you develop business development skills in senior associates and non-equity partners who are already stretched thin? Panelists tackled real challenges: time constraints, confidence gaps, and limited mentorship. They shared what works—lateral concierge services, BD book clubs, peer accountability groups—and discussed measuring success while playing to individual strengths. The focus was on creating programs that actually help people grow beyond their comfort zones while managing competing priorities from client work and family obligations.

## MODERATOR



**Silvia Coulter**  
Co-Founding Principal,  
LawVision

## PANELISTS



**Azeema Batchelor**  
Chief Marketing &  
Business Development,  
Dinsmore & Shohl LLP



**Tiffany Zeigler**  
Chief Marketing Officer,  
Polsinelli PC

## Navigating New Waters: Using AI for Tailored Client Journeys

This session got practical about using AI for personalized client experiences. Participants explored real use cases like helping lateral partners integrate by matching them with prospects, creating automated competitive intelligence, and using ChatGPT for appellate research. The focus was moving beyond basic automation to create research that partners actually trust and use. Key themes included structured prompts, audit trails, and positioning AI as business development ammunition rather than just dashboards or generic reports.

## MODERATOR



**Jonathan Fitzgerald**  
Managing Partner,  
Equinox Strategy  
Partners

## PANELISTS



**Michael Idinopulos, PhD**  
Co-Founder, MyMai



**Jennifer Reeves**  
Lead Innovation  
Counsel, Quinn Emanuel  
Urquhart & Sullivan LLP



**Ian Ribald**  
Chief Business Development  
& Marketing Officer, Willkie  
Farr & Gallagher LLP



## The Lighthouse: Empowering Lawyers with Marketing Analytics for Business Development Success

How do you turn data into insights lawyers will actually use? This session tackled a common problem: measurement frameworks that feel more like surveillance than guidance. Panelists discussed identifying meaningful metrics—engagement signals, cross-practice collaboration, win/loss patterns—and presenting them as practical guidance. A key theme was getting buy-in by understanding resistance, engaging leadership early, making insights digestible, and handling imperfect data with transparency while inviting refinement from users.

## MODERATOR



**Jen Dezzo**  
Director, Client Relations,  
Thomson Reuters  
Institute

## PANELISTS



**Justin Edmondson**  
Chief Marketing and  
Business Development  
Officer, Duane Morris LLP



**Iris Jones**  
Chief Marketing and  
Client Development  
Officer, Akerman LLP



**Kate Stoddard**  
Chief Marketing and  
Business Development  
Officer, Kelley Drye &  
Warren LLP



## Message in a Bottle: Steering the Dialogue around Strategic Communications

Strategic communications isn't just nice to have—it's operational necessity. This session explored how communications teams can prepare for predictable pressure moments while advancing a cohesive message. Key topics included internal alignment so lawyers can communicate consistently and audience segmentation since different stakeholders consume information differently. The takeaway: choose your story, test it, and execute with focus. Success requires staying coherent over time and confidently maintaining your narrative under pressure.

## MODERATOR



**Adrian Lürssen**  
Co-Founder, VP of  
Strategic Development,  
JD Supra

## PANELISTS



**Julie Cohen**  
Chief Marketing Officer,  
Cahill Gordon &  
Reindel LLP



**Maura Connell Brandt**  
Chief Marketing Officer,  
Cowell & Moring LLP



**Chris Hinze**  
Chief Marketing and  
Business Development  
Officer, Steptoe LLP



**Peter Pochna**  
Managing Director,  
Rubenstein  
Communications

## Catching the Current: Building an Activator Culture

Based on research across 3,000 business developers at 41 firms, this session explored what makes top performers different. Panelists examined the “Activator” profile—partners who proactively build networks and create value through introductions. The discussion revealed specific mindsets and habits that drive measurable revenue growth. With 24 Global 100 firms already using Activator programs and seeing 50%+ year-over-year growth, participants learned actionable strategies for building firm-wide cultural transformation through sustained coaching.

## MODERATOR



Brenda Plowman  
Founder, Plowman Consulting, Inc.

## PANELISTS



Erin Corbin Meszaros  
Global Business Development & Marketing Officer, Eversheds Sutherland LLP



Jeanne Hammerstrom  
Chief Marketing Officer, Benesch, Friedlander, Coplan, & Aronoff LLP



Judith Itkin  
Chief Lawyer Recruiting & Development Partner, Hunton Andrews Kurth LLP



*Mindsets, habits, and behaviors—not luck—distinguish top performers.*

## PRESENTER



Jen DeZso  
Director, Client Relations, Thomson Reuters Institute

## Preconference Breakfast Session: Communicate, Compete, Differentiate in an AI-Driven Market

Over breakfast, attendees got key insights to frame the day’s discussions. The big takeaway: 72% of in-house counsel don’t know if their law firms use AI—a transparency gap that threatens client relationships. The session covered how firms with formal AI strategies see better results (70% versus 48% without) and explored the tension between AI efficiency and traditional billing models. Discussion also covered client portfolio management strategies for deepening wallet share with existing clients.

*72% of in house counsel don't know if their firms are using AI—an alarming transparency gap.*

## Tides of Change: Exploring the State of the Legal Market

The legal industry faces a paradox: historic demand growth alongside unprecedented anxiety about the future. This session examined the data—36% of large companies plan to increase legal spend, yet only 23% goes to their most-used firms, revealing shallow client relationships. The message was clear: firms must organize their data infrastructure to meet increasingly sophisticated client expectations. Success depends on embracing change management, investing in technology, and developing new service delivery models.



## PRESENTER



Jen DeZso  
Director, Client Relations, Thomson Reuters Institute

## MODERATOR



Mark Wasserman  
CEO Emeritus, Eversheds Sutherland (US) LLP

## PANELISTS



Aubrey Wanner Bishai  
Chief Innovation Officer, Vinson & Elkins LLP



Brian Colucci  
Chief Business Development & Marketing Officer, Kilpatrick Townsend & Stockton LLP



Clara Rodriguez  
Chief Marketing & Business Development Officer, McGuireWoods LLP

## The Bounty of the Sea: Large Law vs. Mid-Sized Law

This debate-style session brought together CMBDOs from different firm sizes to explore what really drives success beyond scale. Key themes included preserving agility despite growth, the expanding CMBDO role as “master of everything,” and securing meaningful leadership seats. Mid-sized firms leverage personalized service and quick decisions, while large firms combat perceptions of impersonality through intentional client experience design. Panelists agreed that AI’s real value lies in enabling lawyer creativity rather than mere efficiency gains.



### MODERATOR



**Jen Sander**  
Marketing & Strategic Events, Thomson Reuters Institute

### PANELISTS



**Lisa Azzuolo**  
Chief Strategy & Growth Officer, Lavery de Billy LLP



**Julie Chodos**  
Chief Marketing & Business Development Officer, Axinn, Veltrop & Harkrider LLP



**Michael Michaelides**  
Global Chief Marketing Officer, A&O Shearman



**Nicole Petrie**  
Chief Marketing and Business Development Officer, Proskauer Rose LLP



*AI is expanding what business development teams can accomplish by helping lean groups produce tailored client work, accelerate RFP responses, and surface insights that strengthen client engagement.*

## Riding the Trade Winds: Unlocking the Power of Agentic AI for Business Development

This session addressed real concerns about AI adoption while providing practical implementation guidance. The key message: AI won’t replace professionals—it amplifies their capabilities, allowing smaller teams to compete through enhanced efficiency. Panelists discussed how AI enables more responsive client work, from customized RFP responses completed in hours to real-time monitoring that anticipates client needs. Success requires firm-wide commitment beyond IT departments, with leadership education being essential for effective implementation.

### MODERATOR



**Ray Meiring**  
CEO, QorusDocs

### PANELISTS



**Hans Haglund**  
Managing Director – Business Development, Harness IP



**Dayle Hauserman**  
Solution Sales Executive & Team Lead, Litera



**Rich Robbins**  
Director of Applied AI, Reed Smith LLP

## Full Sail Ahead: Designing a Future-Proof Growth Strategy through Dynamic Client Portfolio Management

Client portfolio management isn't about retrospective reports—it's about allocating attention and resources strategically. This session emphasized that ideal clients are contextual: some are smaller but highly dependent, others require collaboration and the right team. Panelists shared practical methods for sizing opportunity and turning strategy into repeatable processes. The focus was on execution over compensation tweaks, using tools like client alerts and monthly touchpoints to prevent strategy from stalling.

### MODERATOR



**David Ackert**  
Founder & CEO,  
PipelinePlus

### PANELISTS



**Laura Fulton**  
Chief Business  
Development & Marketing  
Officer, Katten Muchin  
Rosenman LLP



**Nora Shearer**  
Chief Business  
Development & Marketing  
Officer, Seward &  
Kissel LLP



**Liz Sobe**  
Director of Business  
Development, Robinson  
& Cole LLP



*Client portfolio management is shifting into a forward looking discipline, directing attention and resources based on opportunity, risk, and relationship depth rather than solely on past results.*

## Regatta of Returns: Preparing for Market Evolution amid Strong Private Equity Market Presence

Private equity's expanding influence is reshaping professional services, and legal could be next. This session covered PE ecosystem nuances, including complex buying committees where managing directors often drive counsel selection rather than general counsel alone. Key themes included understanding

portfolio relationships holistically, tracking fund families for pricing consistency, and balancing scalable service with bespoke expertise. PE clients demand speed, efficiency, and demonstrated ROI, requiring firms to maintain agility and data transparency.

### MODERATOR



**Koree Khongphand-Buckman**  
Chief Marketing &  
Business Development  
Officer, Foley &  
Lardner LLP

### PANELISTS



**Mimi Eingorn**  
Director of Client  
Operations & LPM,  
Ropes & Gray LLP



**Julie Snow-Samanant,**  
Chief Marketing Officer,  
Fredrikson & Byron PA





# Conference Keynote

## Fran Lebowitz

Acclaimed author, cultural commentator, and celebrated essayist

MODERATOR



Jeff Mason  
White House Correspondent  
Reuters

### Anchored in Excellence: A Conversation on Culture & Current Events

The 33rd Annual Chief Marketing and Business Development Officer Forum featured a captivating keynote conversation with renowned cultural commentator Fran Lebowitz, moderated by Reuters White House Correspondent Jeff Mason. The session delivered sharp wit and incisive social commentary, offering attendees a thought-provoking exploration of contemporary culture, art, and politics that resonated deeply with legal marketing leaders navigating their own industry transformations.

Lebowitz opened with a stark assessment, asserting that America lacks a cohesive culture, humorously crediting Dunkin Donuts and personal injury lawyers as the country's binding forces. She offered biting commentary on current political dynamics, describing contemporary politics as driven by resentment, while playfully suggesting that certain political outcomes might have been avoided had Meryl Streep simply said hello. Reflecting on political discourse, she distinguished between traditional Republicans and today's political actors, noting the ease of having differences of political opinion with friends in earlier, less polarized times.

The conversation turned philosophical as Lebowitz addressed technology's impact on society, revealing her deliberate disconnection—no phone, no typewriter, no constant reachability—and expressing greater concern about declining human intelligence over the rise of artificial intelligence. She observed that younger generations increasingly blur reality and digital simulation, with many no longer caring whether experiences are authentic. When asked about her daily life, Lebowitz quipped that she travels only to pay for her apartment, which itself is her vacation, and declared housing has become universally unaffordable. The session provided attendees with Lebowitz's signature irreverent wisdom, connecting cultural observation to broader questions about authenticity, human connection, and leadership in an increasingly digital age.

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*“America lacks a cohesive culture—  
except perhaps for Dunkin Donuts  
and personal injury lawyers.”*

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## Surf's Up: From First Wave to Long Ride—Hiring and Retaining Top Talent

This session positioned talent as a leadership outcome, not a recruiting transaction. Panelists emphasized that retention hinges on steady human rhythms—regular updates, predictable communication, and consistent one-on-ones that build trust. The focus was on understanding individual motivators (meaningful work, clarity, advancement, compensation) and investing selectively in high-impact contributors. On hiring, emphasis was on fit and energy, prioritizing candidates excited by building and influencing while avoiding rushed decisions.

### MODERATOR



**Charlotte Croker**  
Principal, Caldwell  
Partners

### PANELISTS



**Mariana Loose**  
Chief Marketing Officer,  
Alston & Bird LLP



**Kelly MacKinnon,**  
Chief Marketing &  
Business Development  
Officer, Gibson, Dunn &  
Crutcher LLP



**Danielle Wuschke  
Paige**  
Chief Marketing &  
Growth Officer, Nixon  
Peabody LLP



*In today's market, international strategy focuses less on launching new offices and more on being present where clients need support, delivering consistent quality, the right expertise, and a clear value proposition.*

## Beachfront Blueprints: An Exploration into International Markets

International strategy isn't about geographic ambition—it's about client readiness. Where do clients need you to show up, and how? Panelists explored approaches from office launches to strategic alliances, emphasizing market selection based on client demand signals, regulatory realities, and talent access. Key challenges included maintaining service standards across jurisdictions and building relationship infrastructure for continuity. The most durable strategies are anchored in clear value propositions and realistic views of cross-border client service.

### MODERATOR



**Jon Brewer**  
Senior DealCloud Growth  
Director, Intapp

### PANELISTS



**David McClune**  
Chief Business  
Development & Marketing  
Officer, Davis Polk &  
Wardwell LLP



**Angela Petros**  
Global Chief Marketing  
Officer, Baker McKenzie



**Kerri Vermeylen**  
Chief Marketing Officer,  
Sidley Austin LLP

## Charting Hidden Channels: How Emerging Lawyers Mine Relationship Intelligence from Non-Traditional Sources

Emerging lawyers build networks through platforms that don't integrate with firm CRMs. This panel explored capturing digital relationship intelligence while maintaining professional standards. LinkedIn facilitates continuous networking, while younger generations post more naturally than senior colleagues. Key challenges included establishing clear social media policies, balancing ethical considerations with visibility concerns, and recognizing that clients will search for junior lawyers online regardless of firm website presence.



MODERATOR



**Stacey Morrow**  
Legal Industry Director,  
Introhive

PANELISTS



**Adam Soames**  
Global Chief Business  
Development Officer,  
Ashurst LLP



**Meranda Vieyra**  
Chief Marketing &  
Business Development  
Officer, Messner  
Reeves LLP



## The Captain's Compass: Harnessing Emotional Intelligence for Leadership and Client Connection

This session examined emotional intelligence as a practical leadership toolkit for improving decision-making, team dynamics, and client trust. Panelists discussed actionable practices: active listening that surfaces needs before they become problems, psychological safety that enables candor, and attorney collaboration that encourages cross-selling. The conversation centered on leading through ambiguity and motivating teams under real constraints. In a fast-moving legal market, emotional intelligence functions as a compass for navigating complexity.

MODERATOR



**Vanessa Torres**  
Chief Marketing and  
Business Development  
Officer, Lowenstein  
Sandler LLP

PANELISTS



**Sheenika Gandhi**  
Chief Marketing Officer,  
Greenberg Glusker LLP



**Oliviana Mingarelli**  
Global Head of  
Marketing and Business  
Development, Fasken  
Martineau DuMoulin LLP



**Gillian Ward**  
Chief Marketing and  
Business Development  
Officer, Reed Smith LLP

## Anchors Aweigh: Leveraging Technological Tools and Trends

Technology leadership starts with purpose—tools are the how, not the why. This panel explored profile-raising that converts to business development, selecting timely topics that match BD strategy and mapping them to firm expertise. The second focus was AI-supported CRM hygiene for events, addressing duplicates and stale contacts. Clean, governed data enables better segmentation and personalization while reducing manual work. The final segment tied strategic intelligence to growth through reliable market signals.

## MODERATOR



**Erin Banks**  
Chief Marketing Officer,  
Husch Blackwell LLP

## PANELISTS



**Zena Applebaum**  
Senior Vice President,  
Market Development,  
Harbor Global



**Andrew Laver**  
Chief Marketing and  
Business Development  
Officer, Porzio, Bromberg  
& Newman P.C.



**Kimberly Rennick**  
Chief Business  
Development and  
Marketing Officer,  
Thompson Coburn LLP



*Recruiting is a branding opportunity— how a firm communicates signals what it's like to work there.*



## Sand and Sea: Engaging Lateral Talent Through Unified Communication

Lateral recruiting is a communications strategy where consistency and clarity determine outcomes as much as credentials. Panelists emphasized uniform messaging throughout the recruiting process and connecting BD plans with marketing early so laterals see how the firm converts relationships into revenue. Recruiting was positioned as a branding opportunity—how you communicate signals what it's like to work there. The group examined ROI realities, including sobering data on laterals under-delivering against projected books.



**Julie Henson**  
Chief Growth Officer,  
Decipher Investigative  
Intelligence



**Kelly Mixon Morgan**  
Chief Legal Performance  
Officer, Barnes &  
Thornburg LLP



**Dave Poston**  
Chief Executive Officer  
and General Counsel,  
Poston Communications



**Sona Spencer**  
Chief Legal Talent Officer,  
Troutman Pepper  
Locke LLP

## Steering by Starlight: Exploring Smarter Cross-Selling Strategies

Cross-selling is about client needs, not internal sales campaigns. This session mapped where firms sit on the maturity curve and addressed common friction points like persistent silos and the “ick factor” of sounding transactional. The focus was reframing cross-selling as mapping opportunity using relationship intelligence and client feedback. Execution strategies included structured cross-practice sessions, accelerating lateral integration through intentional introductions, and building continuity through succession-minded relationship coverage rather than relying on compensation changes.

## MODERATOR



**Will Eke**  
SVP, Sales, Passle

## PANELISTS



**Alessandra Almeida Jones**  
Global Chief Marketing Officer, Bryan Cave Leighton Paisner LLP



**Gina Carriuolo**  
Chief Business Development and Marketing Officer, Hinckley Allen & Snyder LLP



**Barbara Malin**  
Chief Business Development and Marketing Officer, Jackson Walker LLP



Whitespace analysis makes missed revenue visible.





# Closing Remarks

This summary captures insights from three days of dialogue on modern law firm leadership at The 33rd Annual Chief Marketing and Business Development Officer Forum. As the legal industry experiences historic demand amid fundamental structural changes, the conversations illuminated pathways for marketing and business development leaders to champion change, demonstrate measurable impact, and lead confidently.

We extend our gratitude to every moderator, panelist, and participant whose contributions enriched this Forum. Special thanks to our keynote speaker, Fran Lebowitz, whose sharp cultural commentary provided both inspiration and perspective. The ideas presented underscore the essential role that marketing and business development leaders play in driving strategic positioning, fostering client-centered cultures, and translating market intelligence into actionable growth strategies.

The path ahead requires transforming insights into action—rethinking demand generation for leaner teams, designing non-equity partner programs to cultivate future rainmakers, and deploying AI for personalized client experiences. Today's changing currents demand leaders who balance analytical rigor with creative courage. This Forum proved that such leadership is flourishing across the profession, providing a lasting resource for navigating an increasingly competitive, technology-driven marketplace.



Jen Sander

Director, Enterprise Marketing & Strategic Events  
Thomson Reuters Institute



Thomson Reuters  
Institute



# The 34th Annual Chief Marketing and Business Development Officer Forum

January 27 – 29, 2027  
The Ritz-Carlton  
Santa Barbara, California



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