

AI and Legal Marketing Strategies: Leveraging Tech to Enhance Content from Proposals to Online Presence

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LMA WEST/LMASW REGIONAL CONFERENCE

Welcome & Introductions



Kait Groezinger
Enterprise Customer
Success Manager
Writer



Josie Morgan
Chief Operating Officer
BoyarMiller



Vanessa Petrea
Head of Proposals &
Experience
Perkins Coie

Learning Objectives



- **Understanding Generative AI:** Clear, jargon-free explanations of generative AI technologies and their capabilities
- **Practical Applications:** Real-world examples of how AI is currently being used by legal marketing professionals and what this means for the future
- **Ethical Considerations:** Guidance on navigating the ethical implications of AI in the legal industry, ensuring compliance and integrity
- **Future Trends:** Insights into emerging AI trends and how legal marketing professionals can stay ahead of the curve



a level set



10x faster
completion

Employee
bliss

Economic
boom

Limitless efficiency

End of
burnout

Work reinvented

The promise
of generative
AI is business
nirvana...

Definitions & Common Terms



- **Artificial intelligence** technology that can **generate new content**, whether it be text, images, or sounds, **based on the data it has been trained on** learning from a vast amount of existing data
- Examples:
 - ChatGPT, Perplexity, Gemini, Jasper, Copilot, CoCounsel, Writer
- What it isn't?
- What are some common AI terms?



transformation of legal marketing

Solutions Map: Legal Marketing



Create

Produce optimized + personalized marketing content at scale.

Website, blog, or long form content

Personalized client comms

Promo and social media assets

News or event recaps

>50% ↓ Asset creation time

Analyze

Rapidly research, summarize, and analyze dense content.

Legal knowledge assistant

Legislative summaries and analysis

Competitive intelligence reports

RFP responses

30-70% ↓ Time on analysis

Govern

Speed up brand compliance and enable stakeholders.

Brand and compliance reviews

Cross-functional writing assistant

>50% ↓ Effort spent on reviews

Legal Marketing Use Cases



Create

- Write social media posts and reposts/recaps
- Create first drafts of press releases
- Draft blogs
- Repurpose content
- Invent jazzy event invites
- Revise bios and web copy
- Generate internal communications
- Brainstorm ideas for initiatives or campaigns

Analyze

- Assemble competitive intelligence reports
- Summarize proposal requests
- Draft client alert using legal pleadings
- Create executive summary of proposals

Govern

- Build project management plan
- Establish consistent voice between website descriptions (practice/industry pages)
- Adhere to brand and style guide
- Comply with disclaimers, regulations, and inclusivity

Other Use Cases

Create

- Create job descriptions
- Complete self evaluations
- Brainstorm agenda topics/ice breakers
- Establish training or onboarding schedule
- Craft client outreach comms
- Build outlines for presentations

And...

- Craft wedding toast
- Write break-up letter
- Draft social media post about your kid's activity

Analyze

- Summarize email threads
- Analyze employee survey results
- Segment vacation itinerary

Govern

- Define internal policies
- Set performance expectations to align with HR competencies





tackling proposals & RFPs

Proposal Short Cuts Using AI



- Draft email summarizing the RFP for the lead lawyer and team
- Conduct initial CI research for opportunity
- Shorten, enrich, or polish bios
- Summarize practice or industry content
- Develop responses to unique RFP questions
- Create executive summary of proposal



Prompt Examples



Gemini

- **Competitive Intel:** From a legal perspective, provide a summary of the business risks facing [industry type] companies in the [sector] right now.
- **Competitive Intel:** Provide links to recent news articles, recent innovations, and any developments involving [company name] and the potential legal ramifications of these innovations and/or developments.
- **Shorten Bios:** Act as a proposal manager for a law firm. Create a shortened version of this bio so that it is less 150 words or less. Include the lawyer's education as part of the narrative and summarize key experience. [drop in web bio url]

Prompt Examples




Writer (or private LLM)

- **RFP Shred Email:** Act as a proposal manager for a law firm. Summarize this proposal request in an email format for a lawyer that doesn't have time to read the entire document. Focus on items like the scope of services or practice areas requested, due date, the requested format, rates or fees requested, and whether diversity statistics are requested.
- **Exec Summary:** Act as a proposal manager for a law firm. Create an executive summary of this proposal and provide an intro sentence thanking the company for the opportunity and focus on summarizing the legal practices in the document, the team of lawyers included, and the fee proposal. The order should be as follows: introduction paragraph followed by subheadings and content in this order: Our Team, Our Experience, and Our Fee Proposal. End with a conclusion paragraph.
- **Proposal Content:** Act as a proposal manager at a law firm writing a[n] [industry/practice focus] proposal to [Company Name]. Can you help me revise this content to be more client focused and centered around [Company Name]'s legal needs?

Ask Writer Example: Shorten Bio



Perkins
Coe



Martin E. Gilmore
PARTNER
Austin Office Managing Partner, Patent Litigation
Austin, TX
MGilmore@perkinscoie.com
737.256.6118 | [Website Bio](#)

An experienced litigator, Martin works with clients on intellectual property matters and complex commercial disputes.

Martin Gilmore represents clients in patent, trademark, and trade dress, trade secret, and unfair competition matters, as well as in commercial litigation throughout the nation. His successes range from obtaining dismissals of patent infringement suits and injunctions in trade secret disputes to defending companies' patents in post-grant review proceedings.

Martin advises clients in an array of technical fields, including semiconductor design, server technology, streaming video, smartphones, medical devices, pharmaceuticals, digital signal processing, digital cameras, media systems, wireless communications and networking, voice recognition systems, and website design tools. Martin earned bachelor's degrees in biomedical and electrical engineering and a master's degree in electrical engineering, all of which inform his counsel on patent matters in the electro-mechanical, biological, and chemical arenas.

Martin's litigation experience includes leading a federal jury trial to verdict and representing clients in civil and criminal investigations.

Additionally, Martin uses his experience with financial institutions to advise on commercial disputes for trustees. Experienced in soft IP, he has enforced client rights in trademark and trade dress disputes involving publishing, digital advertising, vehicle design, and a variety of consumer services.

Martin maintains an active *pro bono* practice, which includes multiple arguments and hearings in federal district court, successful appeals in the Court of Appeals for Veterans Claims, and negotiated resolutions to family court disputes.

Experience

Intellectual Property Litigation

Patent Infringement Victory for Netflix, Hulu and Amazon

Served as counsel in three patent infringement lawsuits brought against clients Hulu, Netflix and Amazon, winning their motions to dismiss in U.S. District Court for the Northern District of Florida. The court dismissed all three cases with prejudice.

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Bally Gaming v. New Vision Gaming & Development
Serving as counsel for petitioner in CBM reviews involving gaming patents.

IPR2017 - 01534
Serving as counsel for patent owner in an IPR involving polymer production

Trade Secret Dispute
Negotiated stipulated injunctive relief on behalf of a client whose employee

Headphone Technology Infringement Suit Settlement
Negotiated a favorable and confidential settlement in a patent infringement case involving music headphones.

Trademark Appeal*
Assisted in obtaining reversal or vacatur on Second Circuit appeal of adverse descriptive, secondary meaning, infringement and validity, including trademark for a NYC-based digital advertising company.

Patent Litigation*
Assisted in obtaining judgment as matter of law of noninfringement in high patent dispute for a leading smartphone manufacturer after a jury trial in the U.S. District Court for the Northern District of California. Named by the Daily Journal as one of the top defense verdicts in California.

*Prior experience

Business Litigation

Biologics Licensing Dispute
Represent biopharmaceutical company in dispute regarding licensing of pharmaceutical research and treatment.

Investment Bank MBS-Related Counsel*
Represented investment bank in MBS-related actions in connection with the bankruptcy of Lehman Brothers.

Insider Trading Litigation*
Represented a hedge fund in parallel criminal and SEC insider trading investigations.

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Insider Trading Investigations*
Represented multiple hedge funds in internal investigations relating to trading inquiries.

Bondholder Litigation*
Represented corporate CEO in class action and bondholder litigations stemming from the bankruptcy of an automotive company.

Securities Fraud Class Action Dismissal*
Represented company and individuals accused of securities fraud. The case was dismissed after the plaintiff's expert was excluded on Daubert grounds.

Hedge Fund Administrator Counsel*
Represented hedge fund administrator in trade secret and breach of contract case involving access to source code.

Special Committee Counsel*
Investigated allegations of corporate wrongdoing on behalf of special litigation committee in connection with derivative claims.

*Prior experience

Bar Admissions

- Texas
- New York

Court Admissions

- U.S. Court of Appeals for the Federal Circuit
- U.S. District Court for the Southern District of New York
- U.S. District Court for the Eastern District of New York
- U.S. Court of Appeals for the Second Circuit
- U.S. District Court for the Northern District of New York

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Education

- Fordham University School of Law, J.D., 2007, *cum laude*, Member, *Fordham Urban Law Journal*
- Vanderbilt University, M.Eng., Electrical Engineering, 2005
- Vanderbilt University, B.E., Biomedical Engineering and Electrical Engineering, 1999, *cum laude*

Professional Recognition

- Recognized as a leader in *Patent Litigation Intelligence Report*, 2021
- *New York Super Lawyers "Rising Star"*, 2014-2018

Related Employment

- Wilmer Cutler Pickering Hale and Dorr, LLP, Counsel, 2014 - 2016; Associate/Senior Associate, 2007-2009, 2010-2014

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Ask Writer Example: Shorten Bio



Upload a file
Supported types: pdf, doc/docx, ppt/pptx, xls/xlsx, txt, srt

Add a URL
Paste in the URL of a publicly accessible web page

Act as a proposal manager for a law firm. Create a shortened version of this bio so that it is less than 150 words. Include the lawyer's education as part of the narrative and summarize key experience.

Ask Writer Example: Shorten Bio



← **W**

VP Act as a proposal manager for a law firm. Create a shortened version of this bio so that it is less than 150 words. Include the lawyer's education as part of the narrative and summarize key experience.

W Martin E. Gilmore, a partner at Perkins Coie and the Managing Partner of the Austin Office, is a seasoned litigator with a focus on intellectual property and complex commercial disputes. His expertise spans across patent, trademark, trade dress, trade secret, and unfair competition matters, alongside commercial litigation. Martin's clientele includes sectors like semiconductor design, server technology, streaming video, and more. He also engages in pro bono work, notably in patent litigation. His educational background, though not detailed in the provided information, complements his extensive experience in these technical and legal arenas.

▶ Thought process

VP Can you also include his education?

W Martin E. Gilmore, a partner at Perkins Coie and the Managing Partner of the Austin Office, specializes in intellectual property and complex commercial litigation. His practice covers patent, trademark, trade dress, trade secret, and unfair competition matters, serving industries like semiconductor design and streaming video. Martin holds a Bachelor and Master of Engineering in Electrical Engineering from Vanderbilt University, and a J.D. from Fordham University School of Law, where he contributed to the Fordham Urban Law Journal. His pro bono efforts include patent litigation.

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▶ Thought process

Martin E. Gilmore, a **partner** at Perkins Coie and the **Managing Partner** of the Austin Office, **specializes** in intellectual property and complex commercial litigation. His practice covers patent, trademark, trade dress, trade secret, and unfair competition matters, serving industries like semiconductor design and streaming video. Martin holds a **Bachelor and Master of Engineering in Electrical Engineering** from **Vanderbilt University**, and a **J.D.** from **Fordham University School of Law**, where he contributed to the Fordham Urban Law Journal. **His pro bono efforts include patent litigation.**

Gemini: Shorten Bio



Act as a proposal manager for a law firm. Create a shortened version of this bio so that it is less than 150 words. Include the lawyer's education as part of the narrative and summarize key experience. <https://perkinscoie.com/professionals/martin-e-gilmore>

Show drafts ▾



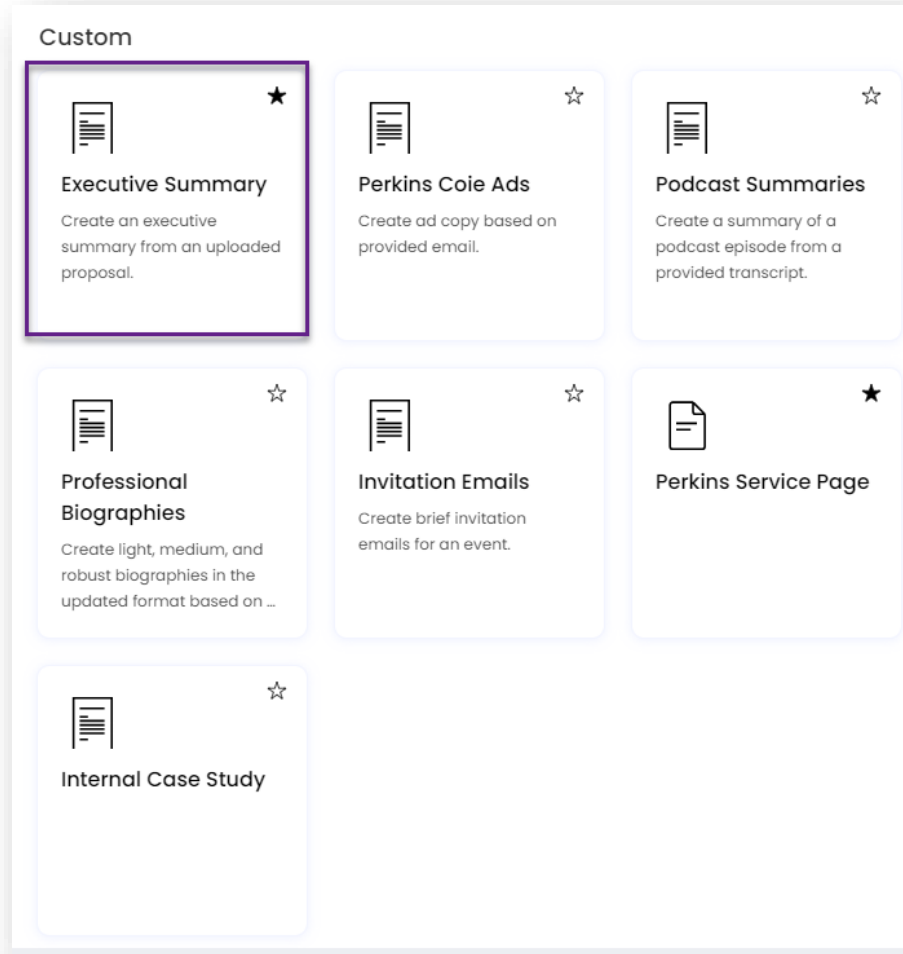
Sure, here is a shortened version of the bio for Martin E. Gilmore that is less than 150 words:

Martin E. Gilmore is a lawyer at Perkins Coie with experience representing clients in intellectual property matters and complex commercial disputes. He has a background in engineering with bachelor's degrees in biomedical and electrical engineering and a master's degree in electrical engineering. Additionally, he has experience litigating in federal jury trials and representing clients in civil and criminal investigations.



Martin E. Gilmore is a **lawyer** at Perkins Coie with experience representing clients in intellectual property matters and complex commercial disputes. He has a background in engineering with **bachelor's degrees in biomedical and electrical engineering and a master's degree in electrical engineering**. Additionally, he has experience litigating in federal jury trials and representing clients in civil and criminal investigations.

Writer: Understanding Custom Apps



Case Study: Executive Summary Custom App

- Trained Writer to digest proposal documents and create executive summary
- Provided 20+ inputs and desired outputs to train AI
- Some text is static while other text is populated using proposal document
- Resulted in huge time savings for our proposal team

Knowledge Graph

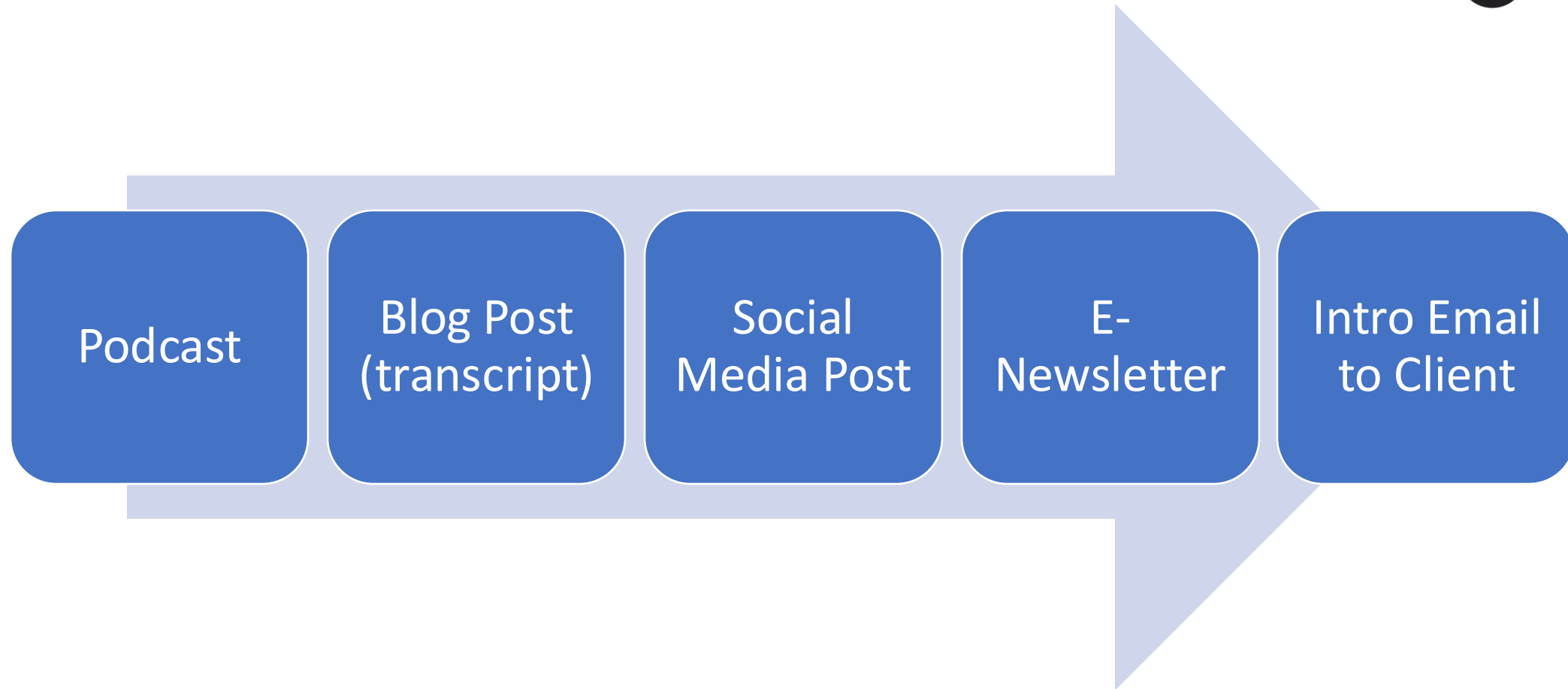


- Module in Writer populated by provided content
- Responses generate using only content provided
- Fed graph random “RFP content” and firm related content
- Example questions:
 - Describe your firm’s sustainability / pro bono / diversity efforts
 - What are some ways your firm uses technology for efficiency?
 - What valued-added services does your firm offer?
 - What specific steps is your firm taking to increase efficiencies that directly impact clients?
- HUGE time saver for creating responses to unique questions

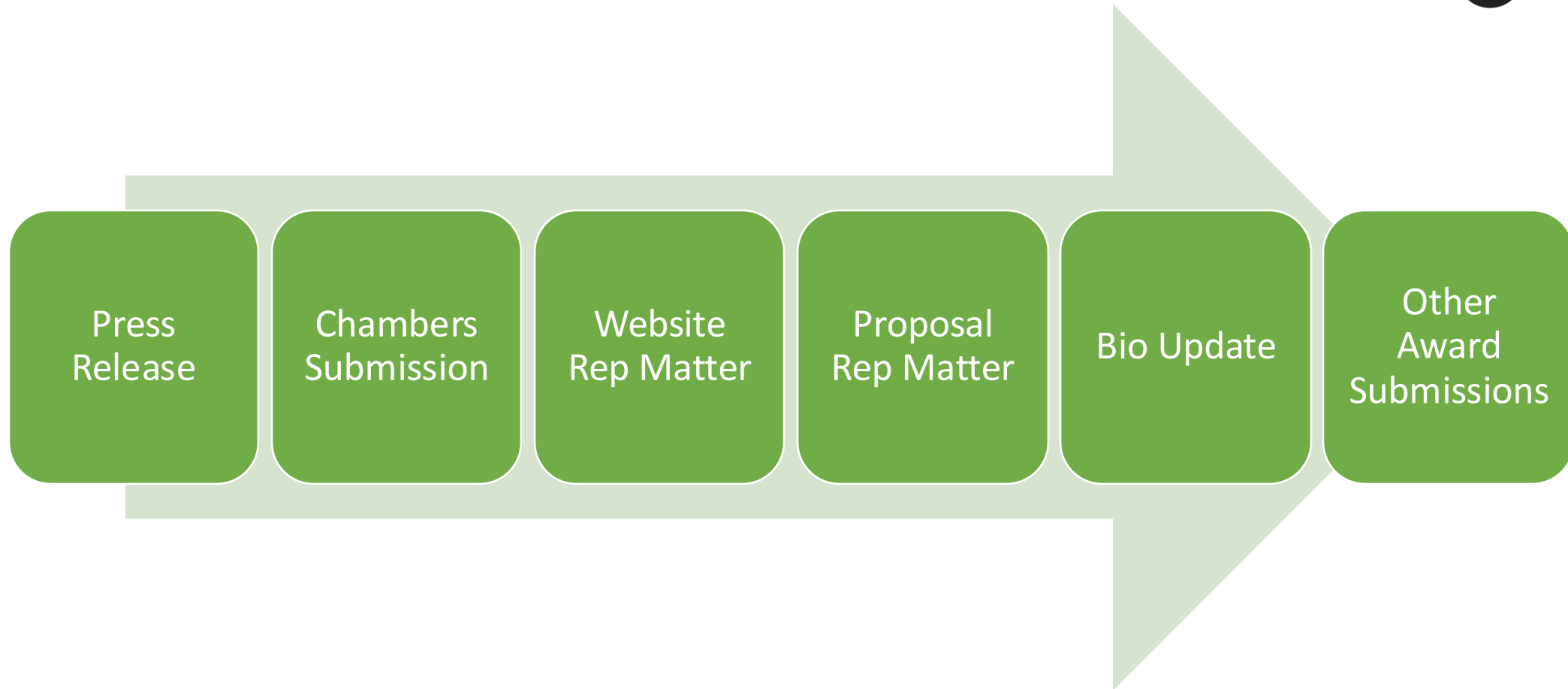


improving online presence

Repurposing & Transforming Content



Repurposing & Transforming Content



Search Engine Algorithms and AI



Like



Celebrate



Support



Love



Insightful

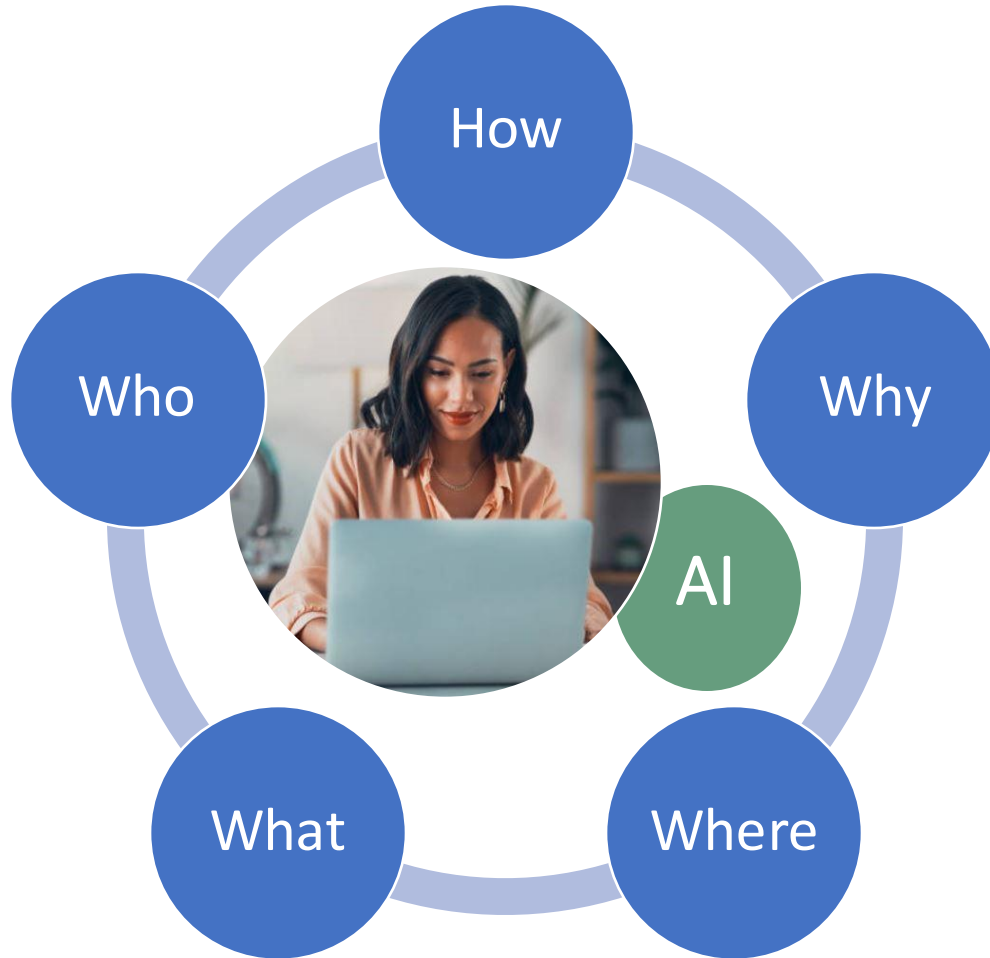


Funny



building your ai skills

Six Elements of Good Prompt Building



Other Tips:

- ✓ Ask AI to build better prompts
- ✓ Be highly specific, clear, and direct
- ✓ Provide examples or sources
- ✓ Keep iterating
- ✓ Ask AI what it needs
- ✓ Use power questions

4 GenAI Power Questions



Prime What do you know about this topic? What do you know about best practices?	Use this question to determine how much context you need to provide.
Augment What questions do you have?	Help GenAI fill in any gaps in knowledge.
Refresh What did I forget? What did I overlook on this topic?	Ask GenAI what you forgot to give the model a chance to clarify and add more relevant text.
Evaluate Did you fulfill the conditions of the prompt completely?	Helps the model refine its answers.



evaluating available tools

Key Considerations



- **Be Selective.** Interview multiple vendors
- **Learn the Features.** Participate in multiple demos and track pros and cons
- **Create Buy-In.** Get team members involved who will be critical in launching tool
- **Trust but Verify.** Call other clients for references
- **Be Prepared.** Do your research, ask hard questions, and be ready for push back
- **Prove It.** Create strong business case for department/firm leaders and estimate ROI

Sample Value Framework



Value pillar	Increase productivity	Accelerate growth	Ensure governance
Your goal	SEO Ranking improvement	Scaling content output that adheres to branding standards	Scaling content output that adheres to branding standards
Business impact	<ul style="list-style-type: none"> Less time spent editing, copywriting and more time on higher value strategy Dollars saved on content production 	<ul style="list-style-type: none"> Increased volume and impact of content created, leading to increased revenue 	<ul style="list-style-type: none"> Risk mitigation of brand damage Improved customer satisfaction
Product adoption leading metrics of success	<ul style="list-style-type: none"> User survey of efficiency gains Number of users producing content # words created # of words reviewed 	<ul style="list-style-type: none"> Number of users producing content # words created Volume of content created Content performance KPIs 	<ul style="list-style-type: none"> # of words reviewed # of suggestions viewed # of suggestions accepted # of snippets usage
Product capabilities to unlock	<ul style="list-style-type: none"> Out of the box apps Custom apps Rewrite API Knowledge graph Snippets 	<ul style="list-style-type: none"> Out of the box apps Custom apps Rewrite API 	<ul style="list-style-type: none"> Terms and style guide setup Knowledge Graph App plugins (Chrome, Word, etc) Snippets Brand voice rewrite

Proving ROI



	Read + Analyze	Create Scope Analysis	Develop Requirements	Editorial review	
Before Writer	Analyze request for pertinent information from RFP. ~1 hour +	Summarize key insights and takeaways. ~3+ hours	Write requirements based on evaluation criteria, project and experience requirements. ~3 hours +	Content is reviewed. ~1 hour	~ 8+ hours
With WRITER	Writer summarizes and analyzes document based of inputs of varying complexity. ~5 mins	Produce output: scope overview risk analysis evaluation criteria project team requirements experience requirements ~10 mins	Content is reviewed and edited. ~10 mins		~1 hour

Pre-Game Plan



- **GenAI Usage Policy.** Who do I need to work with to create a GenAI policy?
- **Ethical Concerns.** What ethical concerns do I need to be prepared to address?
- **Budget.** What am I willing to give up to get AI tool? What time savings can I point to for ROI?
- **Data Security.** What questions are firm leadership and IT going to ask me about an AI tool?
- **Quality of Data.** What assurances can I give firm leadership that data will be reviewed before being seen by a client?
- **Implementation.** Who is going to serve on the launch team to ensure success?



ethical considerations

Ethical Implications



- Client Privilege
- Quality of Work
- Disclosure/Transparency/Informed Consent
- Regulatory Compliance
- Security & Data Protection
- Components of GenAI Usage Policy
 - Scope
 - Purpose
 - Acceptable Use
 - Privacy and Data Protection
 - Quality Control
 - Fairness and Bias
 - Violations



future trends

What's on the Horizon?



- Not going to replace you—treat it as new tool in your toolbox
- Training and upskilling
- Data privacy
- Regulatory implications
- Different GenAI for different tasks
- Integration with other solutions (ex: Copilot, Dragon, Gemini)
- Spellbook, Screens.ai—advertised as GPT-4 for lawyers
- Marketing strategy around feeding AI platforms to inform results and drive leads



How Will Your Clients Find You?

Gemini: What is the best law firm in the whole world?

Some highly regarded law firms that frequently appear on global rankings include:

- **Debevoise & Plimpton:** Known for its strength in mergers and acquisitions, capital markets, and litigation.
- **Latham & Watkins:** A large international firm with a strong focus on corporate law, litigation, and intellectual property.
- **Davis Polk & Wardwell:** Renowned for its expertise in complex financial transactions and litigation.
- **Sullivan & Cromwell:** A leading firm in mergers and acquisitions, capital markets, and regulatory matters.

How Will Your Clients Find You?



Gemini: What is the best energy law firm in Texas?

Some highly regarded energy law firms in Texas include:

- **Baker Botts:** A large international firm with a strong energy practice, including oil and gas, renewable energy, and energy regulation.
- **Vinson & Elkins:** Another large Texas-based firm with a significant energy practice, focusing on oil and gas, mergers and acquisitions, and regulatory matters.
- **Bracewell LLP:** A firm specializing in energy law, with a particular focus on oil and gas, renewable energy, and environmental law.
- **Jackson Walker:** A Texas-based firm with a strong energy practice, including oil and gas, renewable energy, and regulatory matters.

How Will You Evaluate Goods & Services?



Gemini: What are the best breakfast restaurants on the Las Vegas strip?



The "best" breakfast restaurant on the Las Vegas Strip is a matter of personal preference, but here are a few highly-rated options:

- **Hash House A Go Go:** Known for their creative, hearty American breakfast dishes and signature Bloody Marys.
- **Peppermill Restaurant and Fireside Lounge:** A classic Vegas institution offering a variety of breakfast options, including Southern-style and indulgent French toast.
- **Eggslut:** A popular chain specializing in unique egg sandwiches and breakfast bowls.
- **Mon Ami Gabi:** A French bistro offering a sophisticated breakfast experience with classic French dishes.
- **Cafe Americano at Caesars Palace:** A casual spot with a Latin twist, serving up American breakfast favorites and build-your-own avocado toast.



Practical Takeaways

- Review/develop GenAI use policy
- Create a prompt library
- Practice using GenAI power questions
- Advocate for team to use GenAI
- Request local LMA programming
- Think ROI forward
- Publish LinkedIn recap of this session 😊





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Enterprise Customer
Success Manager
Writer



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Chief Operating Officer
BoyarMiller



Vanessa Petrea
Head of Proposals &
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Perkins Coie





thank you for
attending!

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