The New Due Diligence: Why AI Search Now Decides Who Gets the Call

A referral used to give law firms a reliable path into the room. But today, that recommendation might only begin the client's research. Prospective clients increasingly ask ChatGPT, Claude, Perplexity, and other generative tools to identify outside counsel and compare firms to validate names received through their networks. If a firm's website is outdated or inaccurate (or missing entirely), it may lose the opportunity before it knows a search occurred.

The Managing Partner Forum's September 2026 webinar, "The New Due Diligence: Why AI Search Now Decides Who Gets the Call," examined what this shift means for law firm visibility, client retention, marketing governance, and investment. The program combined registration data and audience polling with the perspectives of a marketing adviser and a managing partner confronting the issue inside his own firm.

Moderators:

- **John Remsen Jr.:** President, TheRemsenGroup; President and CEO, Managing Partner Forum
- **Uri Gutfreund:** Senior Vice President and Managing Principal, Ames & Gough

Panelists:

- **Neal R. Devlin:** President, Knox McLaughlin Gornall & Sennett
- **Joe Giovannoli:** Founder and CEO, 9Sail



Audience polling question: how many lawyers are with your law firm?

Key takeaways:

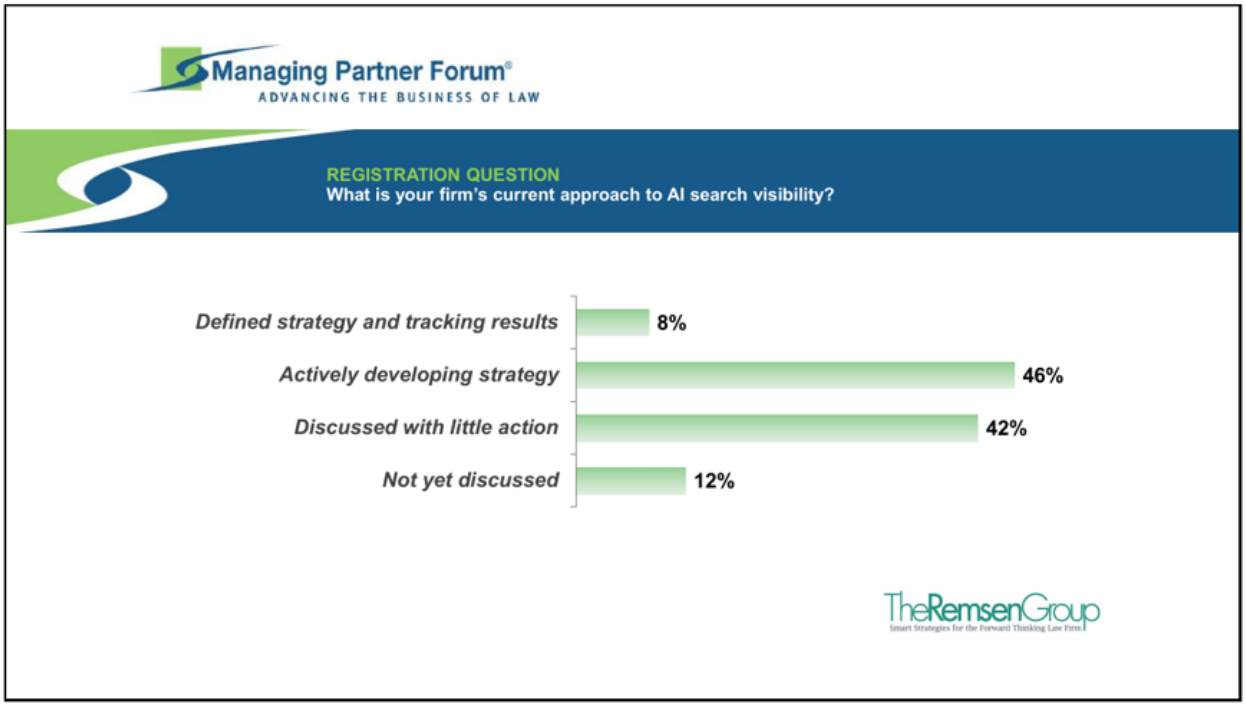
- **AI now influences both discovery and validation:** Buyers may ask a generative tool for recommendations or use it to confirm a traditional referral.
- **Visibility is not a fixed ranking:** Firms need to measure how often and how accurately they appear across representative prompts.
- **Incorrect information can be as damaging as absence:** Outdated attorneys or understated capabilities can redirect sophisticated work to competitors.
- **Invisibility threatens existing relationships:** Clients may quietly move new matters when their current firm does not appear as an authority.
- **Leadership sets priorities, but marketing needs ownership:** Clear accountability is more efficient than prolonged partner or committee involvement.
- **A focused pilot can start the work:** Firms can assess a priority practice, correct gaps, track results, and expand after demonstrating value.

Bringing on the Data!

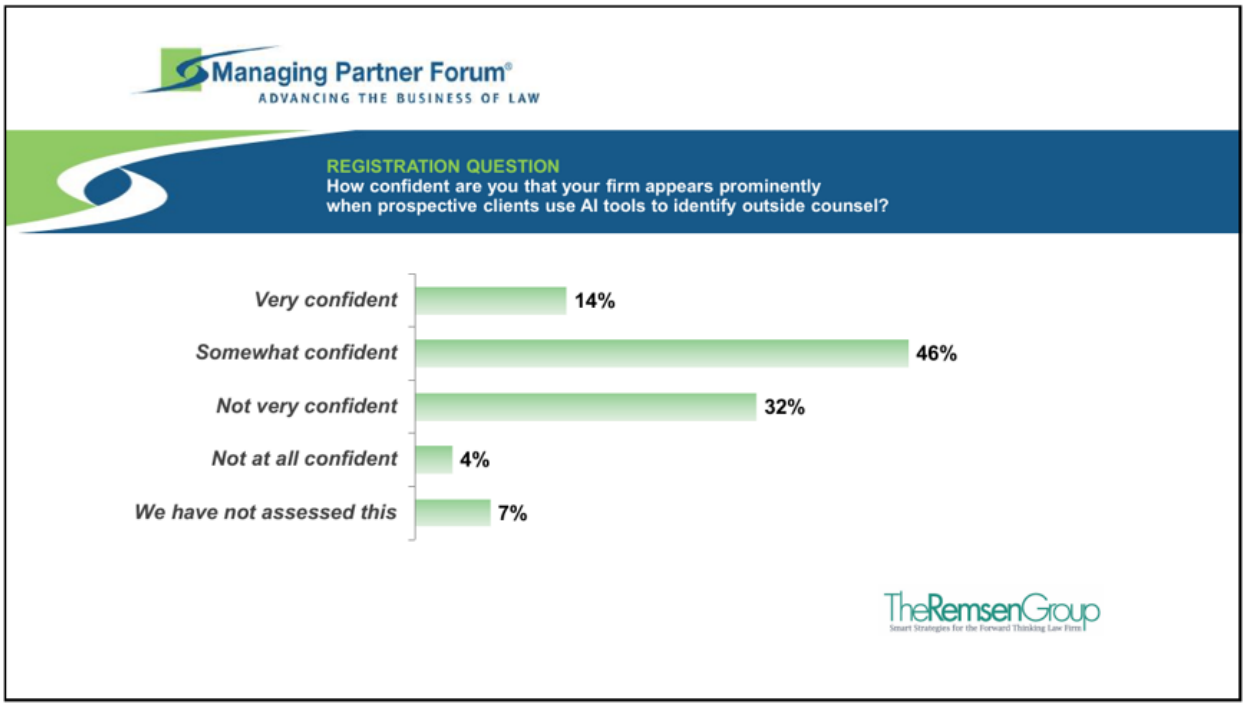
The registration survey showed broad awareness but limited maturity. Only 8% of respondents reported having a defined AI-search strategy and tracking results. Another 46% were actively developing a strategy, while 42% had discussed the issue but taken little action. Confidence was

higher than the level of measurement might suggest: 14% were very confident that their firm appeared prominently in AI searches and 46% were somewhat confident.

Joe Giovannoli challenged that confidence. A firm may perform well for one practice or general brand query while disappearing from the specific questions that matter to prospective clients. Without prompt-level testing, leaders may be relying on an impression instead of evidence.



Registrant question: firms' current approaches to AI-search visibility



Registrant question: confidence in appearing prominently in AI searches

From Keywords to Conversations

Traditional legal SEO was typically associated with consumer practices and short searches for a lawyer in a particular location. **Generative tools encourage a different process.** A buyer can describe a subpoena, employment dispute, regulatory problem, or business conflict in ordinary language, ask what it means, refine the facts, and then request recommendations for counsel.

That conversation can start without a referral, but it can also come after one. John Remsen, Jr. noted that general counsel still rely heavily on relationships while routinely checking recommendations online. **AI therefore functions as both a discovery channel and a validation layer.** Because buyers may contact only one or two firms, the answer can determine who enters the consideration set.

What Claude Told Neal

Neal Devlin illustrated the risk with a search of his own. He asked Claude to compare Knox McLaughlin Gornall & Sennett with competitors for a federal employment matter in Western Pennsylvania. The response omitted him, included lawyers who had left the firm, and suggested that more complex work should go to national firms.

That conclusion did not at all reflect the firm's real experience handling sophisticated employment matters for major employers – in fact, it did the opposite. The test changed the management conversation by converting a concern into a business problem. Neal asked his

marketing director to build representative prompts for the firm's practices and report how Knox appeared against competitors.

> *“Put your consumer hat on... if you were hiring a lawyer... what questions would you ask?”*
>
> – Neal Devlin

Visibility Is Share of Voice

Joe distinguished generative-engine optimization, or GEO, from a conventional search ranking. **A firm does not hold a stable first, second, or third position across ChatGPT, Claude, Perplexity, and Gemini.** Performance changes with the platform, prompt, location, practice, and sources available to the model.

The more useful measure is share of voice: how often the firm appears across relevant questions and how it is characterized when it does. Joe suggested that appearing in roughly 60-70% of appropriate results can represent strong performance. He also emphasized credible third-party authority. Chambers and Legal 500 can influence AI answers because their research and vetting provide signals that are harder to manufacture than paid recognition alone.

> *“It's a share of voice conversation. It's not a ranking conversation.”*
>
> – Joe Giovannoli

The Cost of Online Invisibility

The risk is to more than just acquiring new clients. Joe described “silent churn,” in which an existing client searches for counsel on a new matter, does not see its current firm presented as an authority, and gives the work to someone else. The competitor gains a foothold, while the incumbent may never learn that the opportunity existed.

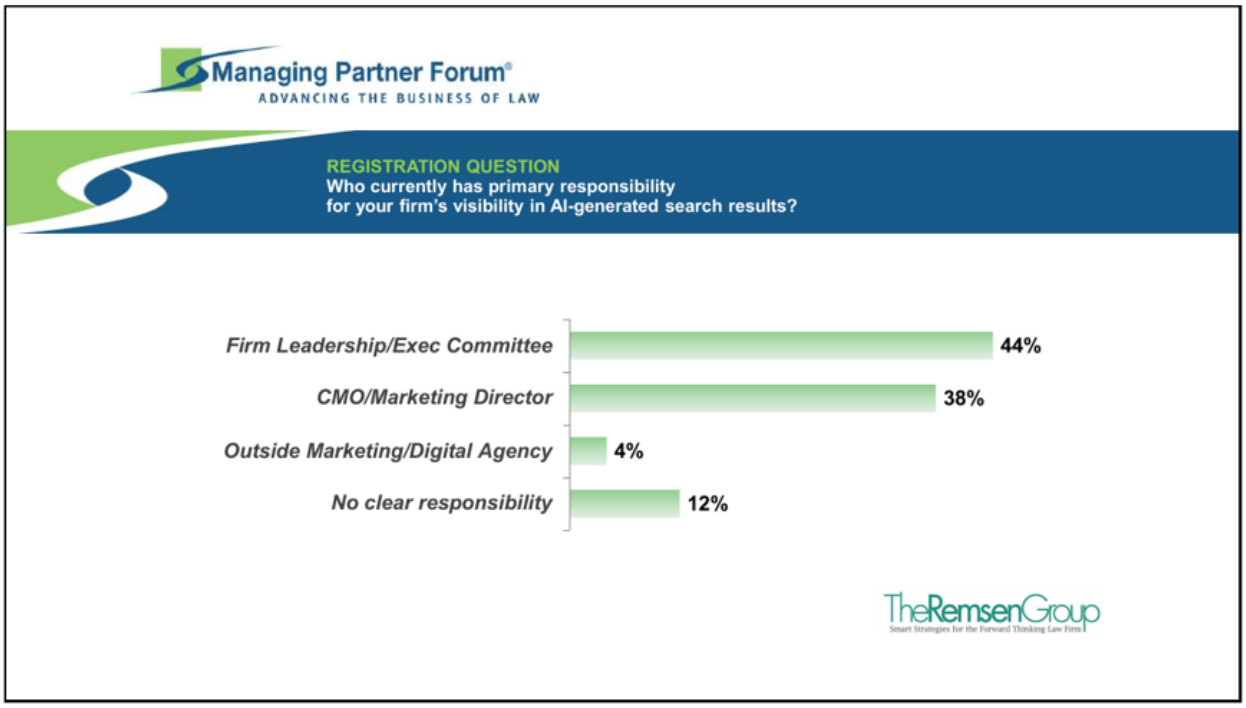
This is particularly important for institutional relationships. Firms may assume that a long-standing client understands every service they provide. The client may instead ask an AI tool, receiving a narrow or inaccurate picture and moving the matter elsewhere. Visibility work is therefore part of retention and cross-selling, not simply lead generation.

Who Owns the Work?

The registration survey placed primary responsibility with firm leadership or the executive committee at 44%, followed by the CMO or marketing director at 38%. The panel agreed that leadership must establish priorities, but Joe argued that lawyers should not manage the initiative day to day. Partner time spent debating marketing tactics carries an opportunity cost and sometimes leaves no individuals or departments accountable.

He recommended a RACI structure that defines who is responsible, accountable, consulted, and informed. The marketing leader should own execution and provide the managing partner with useful metrics. Lawyers still play an essential role by supplying representative matters, results, legal developments, and other evidence of the firm's capabilities.

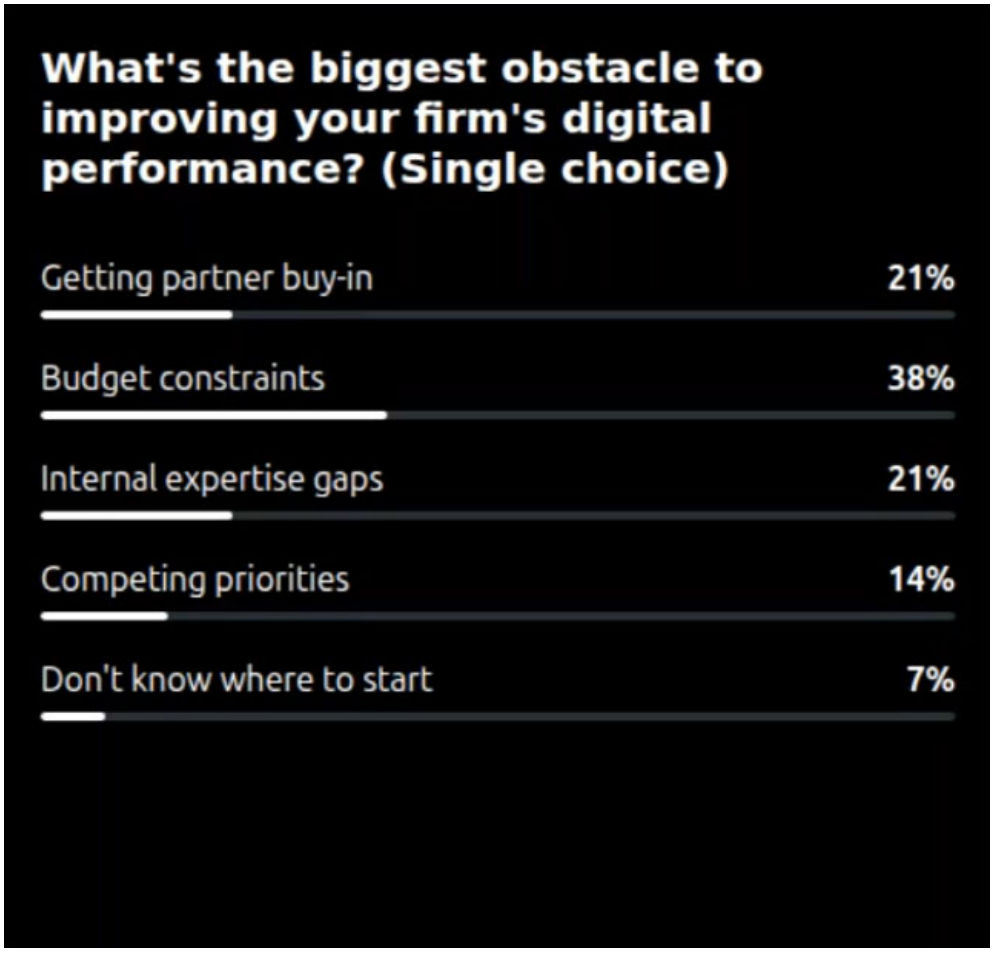
For firms without senior in-house capacity, Neal and Joe supported fractional marketing leadership. A fractional CMO can bring experience from multiple firms, offer benchmarking, and let a firm test the value of specialized leadership before making a permanent hire.



Registrant question: primary responsibility for AI-generated search visibility

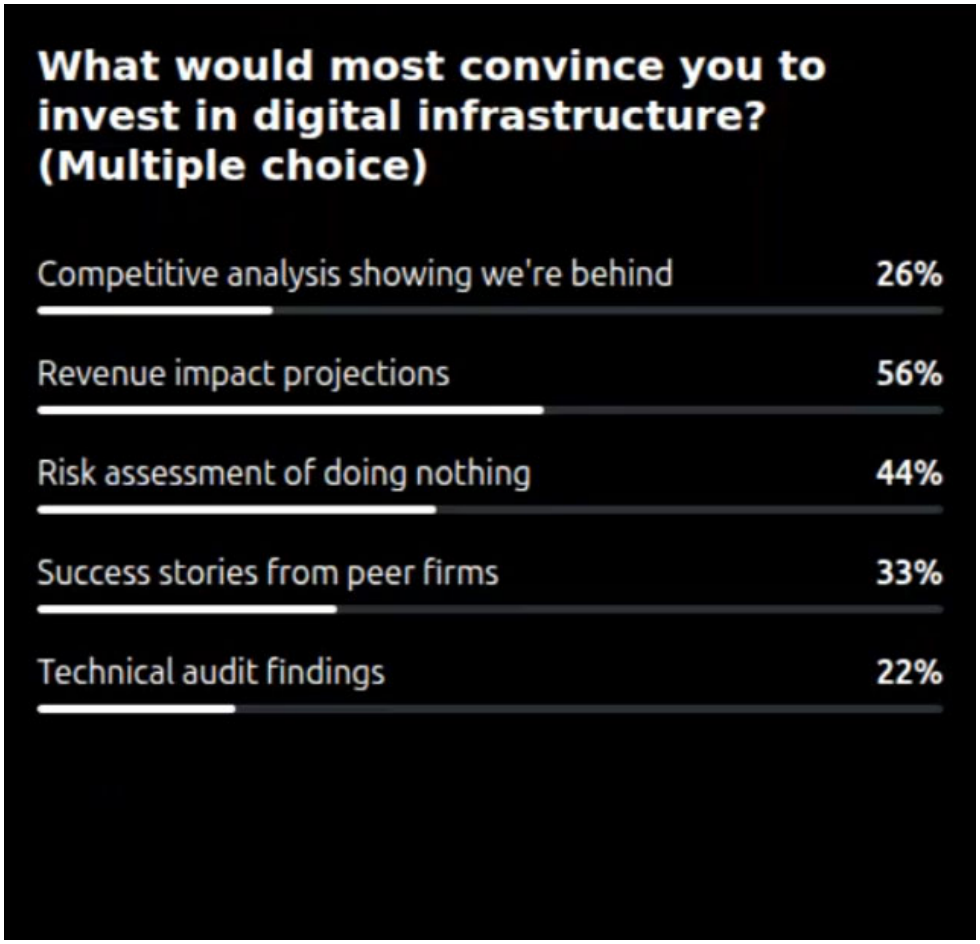
Budgeting for Visibility

Live polling identified partner buy-in, budget constraints, and internal expertise as the principal obstacles to better digital performance. The discussion returned to the longstanding benchmark of spending approximately 2-4% of revenue on marketing, although firms define that category differently. Joe estimated that digital work may receive 30-60% of the marketing budget and placed the starting floor for a credible visibility engagement at roughly $4,000 per month.



Audience polling question: the biggest obstacle to improving digital performance

Those figures were more directional than universal. A firm's market, internal staffing, target practices, and competitive position determine the appropriate investment. Neal recommended beginning with a receptive practice group, setting a defined goal and budget, then creating a proof of concept that other partners can see.



Audience polling question: what would justify investment in digital infrastructure?

What Should Marketing Measure?

The first assessment should resemble the client's research, not the firm's brand search. Teams should test realistic questions across the major platforms and record whether the firm appears, how it is described, who appears instead, and which sources support the answer. Outdated biographies, departed lawyers, unclear experience, and inconsistent descriptions are immediate correction points.

Joe mentioned Profound, Ahrefs, and Semrush as tools for monitoring prompts and sources over time, with Profound his preferred option among those his team had evaluated. His central question for a marketing leader was simple: **How does the firm appear against local and regional competitors?** The answer should be supported by data rather than a general assurance that visibility is improving.

Strategy Before Spend

The speakers cautioned against treating every practice equally. Some practices offer strong online demand and attractive growth opportunities; others may be lower-rate, highly

commoditized, or dependent on a small institutional base. A strategic plan should identify the clients, matters, practices, and markets the firm wants to develop over the next one to three years, then direct visibility spending accordingly.

Uri Gutfreund added that **marketing professionals must participate in strategic discussions early**. They cannot attract the right clients if leadership has not defined what the right clients look like. Neal also noted that **content-based visibility broadens participation in business development**. Lawyers who are less comfortable with traditional networking may contribute effectively by explaining a new decision, documenting a matter result, or developing technical thought leadership.

What's a Firm Leader to Do?



MPF's closing guidance for law firm leaders

AI search will continue to shape how buyers evaluate firms, but leaders do not need to launch an immediate firm-wide transformation. They can begin with a priority practice, a defined owner, and a short list of representative prompts.

- Test the firm as a buyer would and establish a prompt-based visibility baseline.
- Select priority practices according to the strategic plan rather than dividing resources equally.
- Correct outdated information and strengthen authoritative website and third-party signals.
- Assign one accountable marketing leader and create a routine for lawyer contributions.

- Track competitors, cited sources, and changes in visibility over time.
- Run a focused pilot with a budget, deadline, and evidence-based review before expanding.



Audience polling question: the urgency of improving the firm's digital visibility

MPF's broader guidance also urged firms to maintain AI policies, train their people, address AI use in engagement letters, and speak directly with top clients about expectations. The practical choice is no longer whether AI will affect the firm. It is whether leadership will measure what clients already see and improve it before competitors do.
