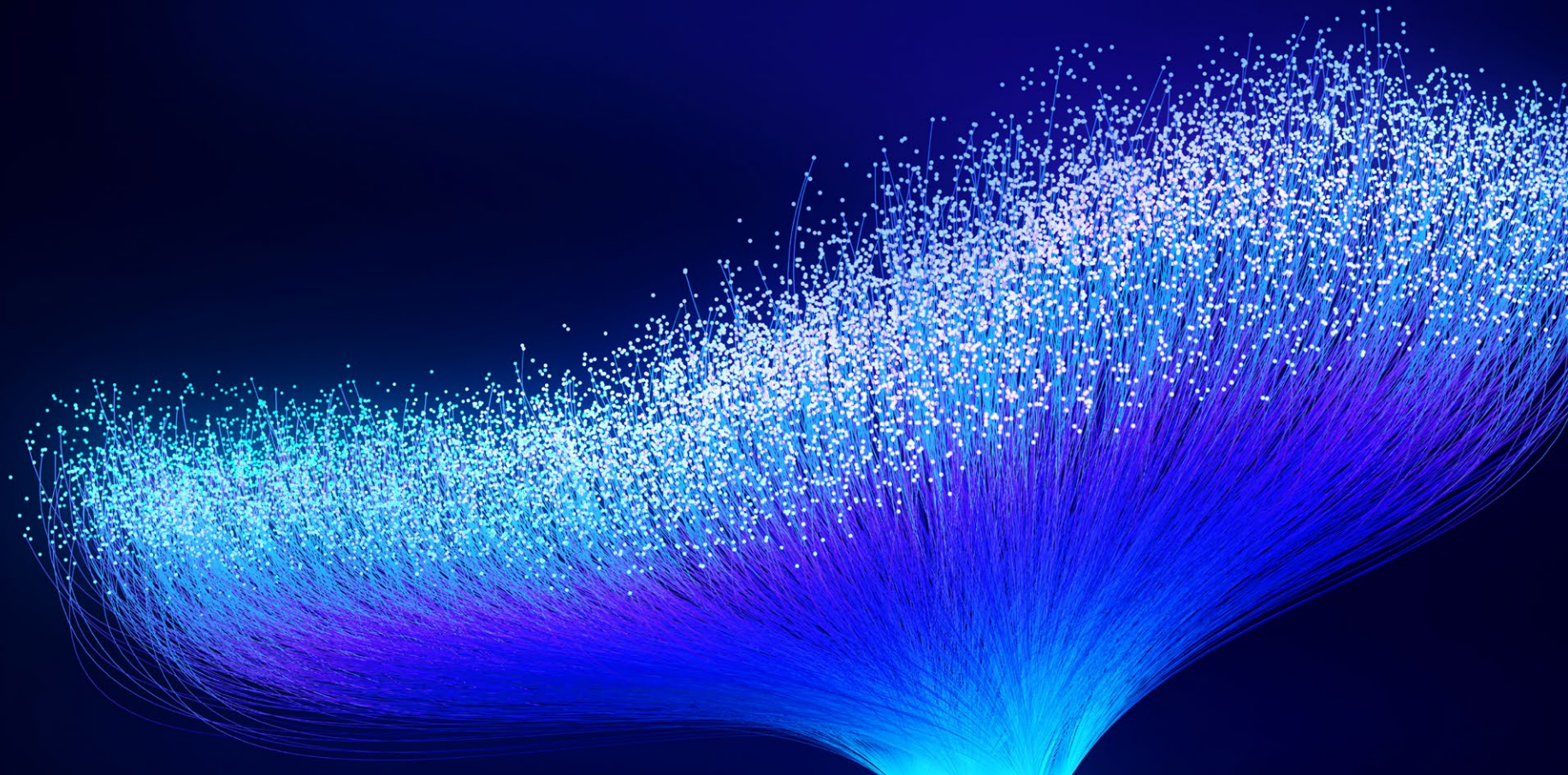
iManage Knowledge Work Benchmark Report 2026

Global findings on AI adoption, governance, and business performance



iManage

Making knowledge work

Contents

Foreword

I have been designing, executing and writing research and thought leadership studies into the legal sector for over 30 years. From creating the research methodology for the Chambers & Partners guides in the mid-90s, to the Financial Times (FT) Innovative Lawyers program, to our most recent study on the usage of Harvey, the legal AI platform.

Too often research studies are poorly designed, too narrow and add little to the topic at hand. Not so, the latest study from iManage. In fact, it is unusually diligent and comprehensive and gives critical insights into the digital transformation of the professions at this existential moment, when many feel their livelihoods to be at risk from AI.

Based on the opinions of 3000 decision-makers in professional services firms across 26 countries, it looks at the behaviors of organizations on their digital journeys. From how they invest in AI to their opinions on the future.

In a unique feature and one that is thrilling to a research professional, the iManage team were able to categorize respondents by their knowledge organization maturity level. It allows for meaningful data analysis and insight into how firms are thinking and behaving, giving valuable context to the findings.

“It is all about IA and not AI” — this comment from an in-house lawyer at Goldman Sachs a few years ago has stayed with me. It is the idea that how you organize your knowledge — your information architecture — is critical to becoming AI-enabled. If AI is the train, IA is the tracks on which it runs.

Anecdotally, we see this in the FT Innovative Lawyer research globally, which examines over 500 law firms and 300 in-house legal teams: the firms and in-house teams who mastered their IA were able to move quickly when generative AI broke in 2022.

The iManage report underlines this point with data. Mature knowledge work organizations — as categorized by the proprietary iManage Knowledge Work Maturity Model — in the research were more likely to be advanced AI users and to report its benefits. Law firms who are still taking a ”wait and see” approach to their tech investments do so at their peril. The iManage report shows that competitive advantage in law firms is being dictated by their digital prowess as much as their legal expertise — if not more so.

Mature knowledge work organizations are developing a moat. They enjoy business benefits such as higher revenues and better customer retention. They are more optimistic about the future. Over half the law firm respondents said that their customers influenced their AI usage and actively encouraged them to use it, showing close alignment around this critical technology. Confidence breeds confidence and advanced usage.

However, the research does put up some warning signals against over-enthusiasm. Nearly a third of the organizations reported people using unsanctioned technology, revealing the need for more robust governance and policy. In addition, despite most organizations (86% of respondents) embracing AI, less than 20 percent had

integrated it into their systems. Even advanced knowledge work organizations with embedded document management systems struggle with the times taken to retrieve information, citing training and email as barriers to efficiency.

Overall, the iManage study presents a guide to digital transformation and insights into both the behaviors of mature and less mature knowledge work organizations. For digital and innovation officers and executive management teams, it is indispensable market insight. Ballast for change and future investment, telling the reader where and how to deploy resources.

The more advanced firms in the study have more radical views about the future of work and the impact of AI. It puts paid to what is rapidly becoming a cliché that "AI will not replace a lawyer, but rather the lawyer that doesn't use it." These firms can see that AI will transform the work they do and how they do it. Their knowledge maturity allows them to leverage the full potential of AI as it stands today — and with it, they can see more radical scenarios. For example, the most mature firms can see the creation of new roles, such as digital ethics officers, and an open door to new and different work.

Given four different future scenarios as to the form and structure of the future law firm, firms that were more mature knowledge organizations could see them all happening to some extent. Trust as a service? Autonomous firms? All could happen. All are positive.

And this is perhaps where the value of the iManage study most lies: a cut through the noise to reveal a roadmap to what is next.

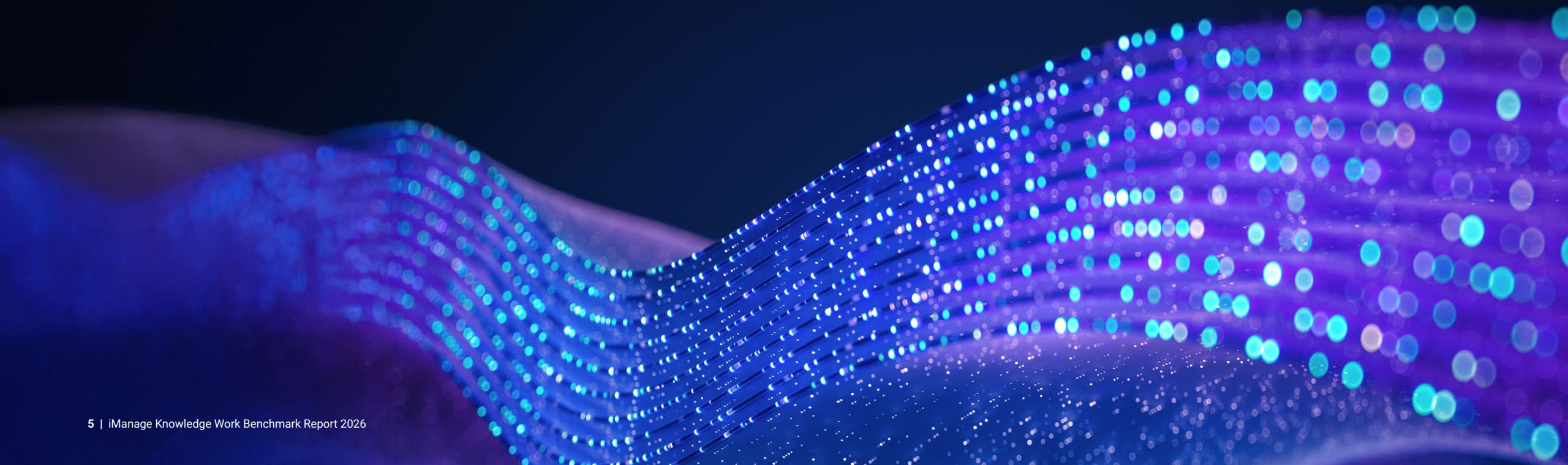
Reena SenGupta
Executive Director, RSGI Limited

Reena is a leading thought leader in the global legal profession with a 30-year track record of innovation. From creating the Chambers & Partners research, ranking and editorial methodology and approach in the mid-1990s to the FT Innovative Lawyers program in the mid-2000s, Reena has designed and authored leading studies and assessments on how lawyers are evolving to remain relevant. She is a regular contributor to the Financial Times, authoring articles on the global legal sector, and a public speaker and senior adviser to legal leaders. Her company, global legal think tank RSGI Limited, consults to top law firms and in-house legal teams, as well as legal technology companies and alternative legal service providers, on strategy, innovation, and sustainable growth. Its latest intelligence platform, Resight Legal, launched in India in 2025, pioneers new frameworks to rate individual lawyer performance through the RISE ratings system.

Note to readers: RSGI is an independent assessor of law firms, legal technology companies, in-house legal teams and ALSPs. Reena SenGupta and RSGI were not involved in the design or execution of the iManage research. However, RSGI's senior consultant, Neville Hawcock (who previously served at the Financial Times as a senior editor) assisted in the final draft of the report. iManage is also a long-term sponsor of the FT Innovative Lawyers program, which Reena founded and to which RSGI is the research and content partner.

iManage Knowledge Work Benchmark Report 2026

Executive summary



The rise of artificial intelligence (AI) is an exciting, if unsettling, moment for knowledge work organizations (KWOs)

Law firms, legal departments, financial institutions, compliance departments, and others are scrambling to realize the benefits of giving this powerful, inexhaustible technology access to all their knowledge. This includes any business or team whose work requires conscientious management of digital documents that contain intellectual property (IP) and sensitive or highly confidential content.

But businesses vary widely in their knowledge work maturity, and AI is widening the gap between leaders and laggards. So how can decision-makers be sure their organizations have the necessary expertise in managing knowledge? What distinguishes the most mature KWOs, and how are they directing their investments to realize the opportunities — and contain the risks — of AI?

This report presents findings that draw out answers to those questions. Conducted in October 2025, the data was collected in a survey of over 3,000 business and technology decision-makers in legal, accounting, tax, asset management, and financial services firms across 26 countries. The resulting analysis looks at how knowledge work maturity impacts organizational performance, technology adoption, and governance.

Building on the Knowledge Work Maturity Model, which assesses how effectively organizations manage their knowledge, this research highlights significant differences in the approach of more mature organizations to digital strategic investments. A clear theme emerges: mature KWOs think and operate differently, unlocking meaningful and measurable advantages. Just as importantly, by cataloging these distinctions, the research offers all organizations a powerful benchmark and roadmap. With it, decision-makers at every stage can invest more confidently and realize greater value from their digital transformation efforts.

3,000+

Business and technical decision makers

26

Countries

iManage Knowledge Work Benchmark Report 2026

Key findings

AI adoption, governance, and business performance

Strong investment momentum across the market.

Most are actively updating their document management systems or planning near-term changes. Notably, the most knowledge-mature organizations are the most committed investors, while being less likely to pursue wholesale system replacement. Their intent to maintain current DMS platforms reflects confidence in a solid foundation and a disciplined strategy, rather than disruptive change for its own sake. They are modernizing through targeted upgrades, deeper integrations, and selective expansion into higher-impact initiatives.

Your DMS cannot have too much functionality.

Two-thirds of these companies use all 27 of the DMS features presented. More advanced KWOs were more likely to use any given feature, as were organizations based in North America.

Businesses are hungry for AI — but have yet to digest it.

Some 85 percent of respondents are piloting, implementing, or using AI, with natural language queries to find documents or information being the most common knowledge work use case. However, only 17 percent of respondents say their AI tools are fully integrated and widely used.

Customers increasingly shape how organizations adopt AI.

Globally, more than half report that customer needs directly influence their AI usage, with this impact growing among organizations with stronger knowledge maturity. At the same time, customers play a role in limiting AI: nearly one third of organizations say clients frequently restrict when and how AI can be used. While higher knowledge maturity can reduce these constraints, industry leaders face a clear push and pull dynamic as they balance innovation with customer expectations and concerns.

Knowledge work maturity pays …

The most mature organizations are more likely to report multiple advantages, such as increased revenue, a growing workforce, and stronger customer retention. They are more likely to turn a profit and to be market leaders. More than 25 percent of mature companies say they are in the top quartile of their markets, compared with only 7 percent of the least mature companies.

… but the basics are still hard to get right.

Some 30 percent of respondents say that inadequate training is holding back effective collaboration. And while nearly all respondents are confident users can find the information they need, they still spend an average of 37 minutes a day finding it.

Governance needs to catch up with “shadow AI.”

About a quarter of respondents allow their employees to use publicly available AI with little oversight. No surprise, perhaps, that 36 percent of companies say they have suffered measurable impact from a document policy violation due to AI tools. Most likely to report a violation are companies falling about midway between least and greatest maturity. One possible interpretation is that, as organizations become more ambitious in their knowledge work management, their security resources take time to catch up.

25% of respondents are using **publicly available AI**

36% of respondents say AI has led to **document policy violation**

AI is transforming roles.

But how much transformation you experience depends on how advanced you are. The least mature KWOs say AI is enhancing existing roles, while their more mature counterparts find it giving rise to entirely new roles. The primary impacts noted are the automation of administrative tasks and enhanced productivity gains from using AI to generate first drafts, suggest edits, and flag contract risks.

Prepare for significant shifts ahead.

While there is broad agreement that AI will reshape future organizations, no single vision of that future dominates. Among the most advanced KWOs, nearly two-thirds believe competitive advantage hinges on the quality of a company’s data, the sophistication of its AI, and the ability of those systems to learn and adapt. By contrast, less mature organizations are more focused on the emergence of new roles — such as trust architects and digital ethics officers — and on developing legal frameworks to govern AI-to-AI interactions.

Despite differing views, optimism is widespread. More than 85 percent of respondents expect these changes to have a positive impact, which signals strong belief in AI’s potential to unlock new opportunities, elevate organizational performance, and shape an innovative future.

Knowledge work is set to play an ever more important role in tomorrow’s global economy. Knowledge work organizations that invest in moving along the maturity curve are helping to bring about that future — and to ensure that they are among the leading players.

These findings suggest a formula for change:

1. Master the basics of collaborative working before pursuing more transformative investments.
2. Ensure that users are fluent in all aspects of the tech stack.
3. Heed your customers.
4. Tighten up governance.
5. Be open to — and even optimistic about — the potential for radical new business scenarios.

85%+ of respondents expect these changes to have a **positive impact**

iManage Knowledge Work Benchmark Report 2026

Introduction

Whether mediated by clay tablets or the cloud, knowledge work is a key component of any economy. Today's knowledge workers manage digital documents containing valuable IP and highly confidential content, which accounts for trillions of dollars in value. This requires deeper skillsets than ever, and the most advanced tools to support them.

$11+

trillion global value

added in 2022 from knowledge- and technology-intensive industries, per America's National Science Board

Founded to serve these organizations, iManage understands the critical relationship between knowledge work maturity and economic development. The company commissioned research to assess how well organizations manage their knowledge with the goal of deepening this understanding. These findings are codified in the Knowledge Work Maturity Model (KWMM). The KWMM offers a clear, practical framework that guides the essential investments in people, processes, culture, and technology, helping organizations strengthen their knowledge capabilities and progress toward higher levels of maturity.

That was at the very beginning of the surge in AI investment that is now reshaping how organizations work and compete. This new body of research, conducted in October 2025, builds on the KWMM findings and furthers our collective understanding. In this report, we explore how legal, accountancy, tax, asset management, and finance organizations worldwide are managing their knowledge, embracing AI, and advancing along the maturity curve.

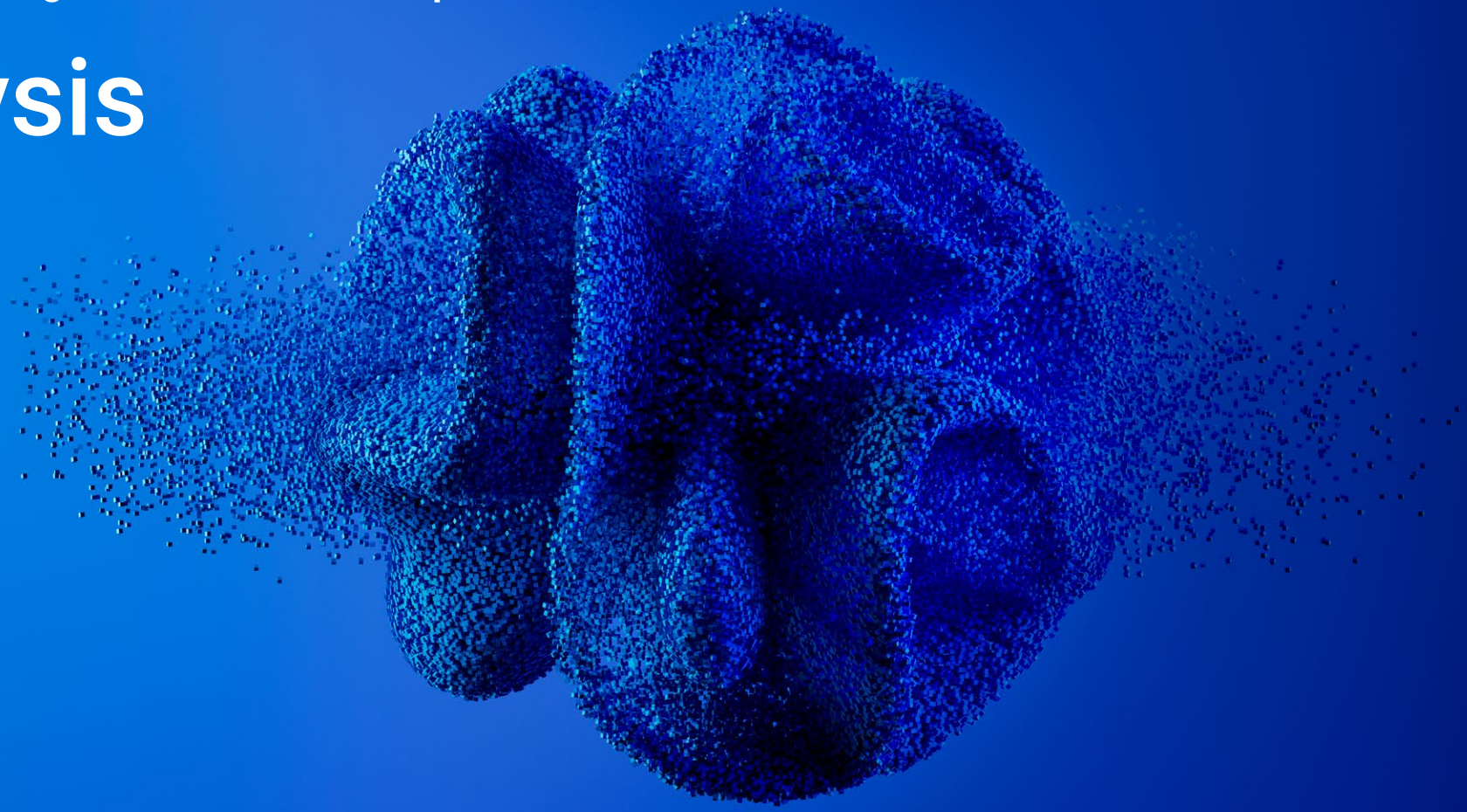
To capture this global perspective, iManage surveyed more than 3,000 business and technology decision-makers across 26 countries. The findings reveal not just where organizations stand today, but also the accelerating ambition and opportunity that lies ahead. These results offer a snapshot of the state of digital enablement across geographies and industries, with insights into which technologies KWOs are investing in, what differentiates market leaders from their competitors, and how businesses view their digital futures.

A central theme that emerges is the clear distinction between mature and less mature organizations, in everything from performance to governance. These distinctions provide a roadmap for organizations that are wondering how to progress towards greater knowledge work maturity.

Knowledge work will always be vitally important. And at a time of unprecedented speed in technological advancement, businesses that have organized their knowledge in alignment with those technologies are best placed to prosper.

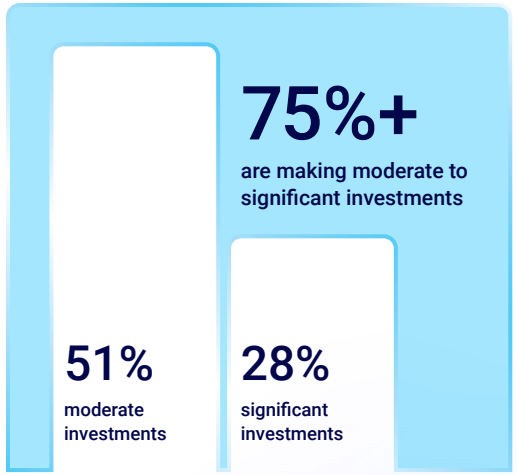
iManage Knowledge Work Benchmark Report 2026

Analysis

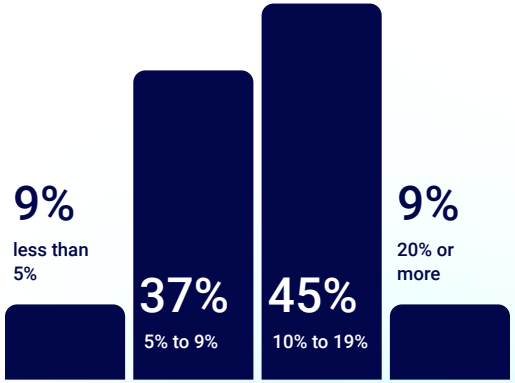


Investment momentum reflects readiness, not just ambition

Investment in digital transformation



Budget allocated to innovation



A strong appetite for change cuts across organizations, but the nature of investment varies by readiness. More than three-quarters of respondents report making moderate or significant investments in digital transformation, *(Figure 53B),* and over half allocate at least 10 percent of their total budget to innovation. This signals widespread recognition that current approaches are no longer sufficient *(Figure 53A).*

However, organizations are not moving in lockstep. Less mature KWOs appear to be prioritizing foundational work such as consolidating tools and repositories, improving consistency in information sharing, and establishing baseline governance before committing to larger-scale transformation. By contrast, more mature organizations are investing at higher levels and with greater confidence, reflecting both their capabilities and views on where additional value can be unlocked *(Figure 59).*

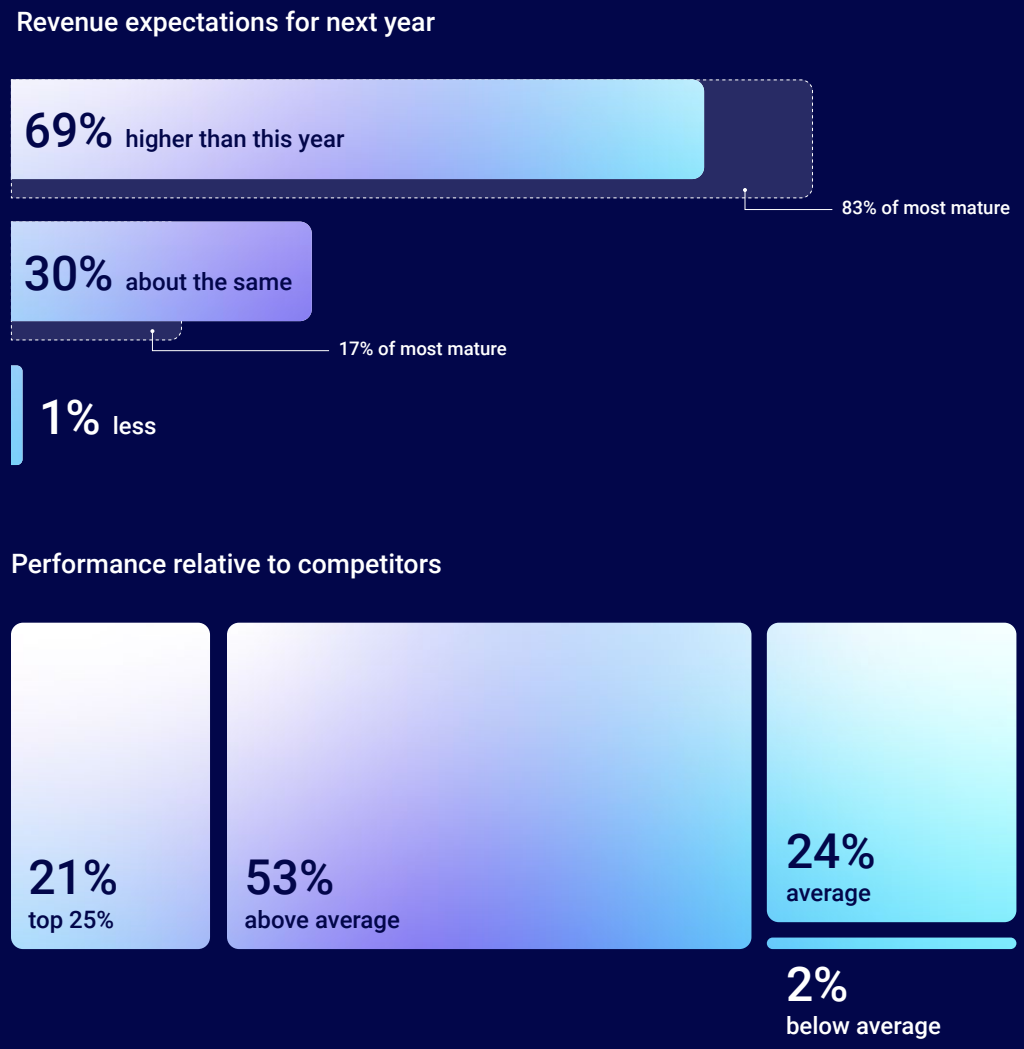
Importantly, regardless of maturity level, organizations are not standing still. Even among those who describe their approach as "maintaining" current systems, investment remains active. The most mature KWOs are nearly twice as likely as the least mature to say they are very or extremely likely to bring in a new DMS within the next two years, underscoring a pattern of continuous optimization rather than a one-time system overhaul *(Figure 27).*

72%

new DMS highly likely

to be implemented in the next two years

Taken together, the findings suggest that digital transformation is less about a single leap forward and more about a deliberate progression shaped by where organizations begin, the risks they perceive, and the strength of their knowledge foundations. And, importantly, across all maturity levels, organizations are demonstrating a shared commitment to investing in their future: advancing at their own pace, but moving confidently toward greater capability, resilience, and long-term value.



Knowledge work maturity empowers meaningful business performance

Knowledge work maturity is more than an operational advantage; it is a strong indicator of business performance. Across nearly every measurable outcome, higher maturity delivers clear, tangible benefits.

This performance gap is most striking in financial outcomes. Among the most mature KWOs, 28 percent report financial performance in the top quartile of their industry, compared with just 7 percent of the least mature *(Figure 50)*. This pattern continues across revenue indicators. Organizations with stronger knowledge foundations are more likely to generate higher revenues, to report year-over-year revenue growth, and to anticipate further gains in the year ahead *(Figure 49)*. Profitability follows the same trend: about 80 percent of the most mature organizations operate at a profit, versus 54 percent of the least mature *(Figure 50)*.

Beyond financial results, more mature KWOs experience stronger workforce growth *(Figure 51),* reflecting both operational confidence and strategic momentum. They achieve significantly higher customer loyalty, with the most mature organizations roughly twice as likely to report year-over-year customer retention of 90+ percent *(Figure 52)*.

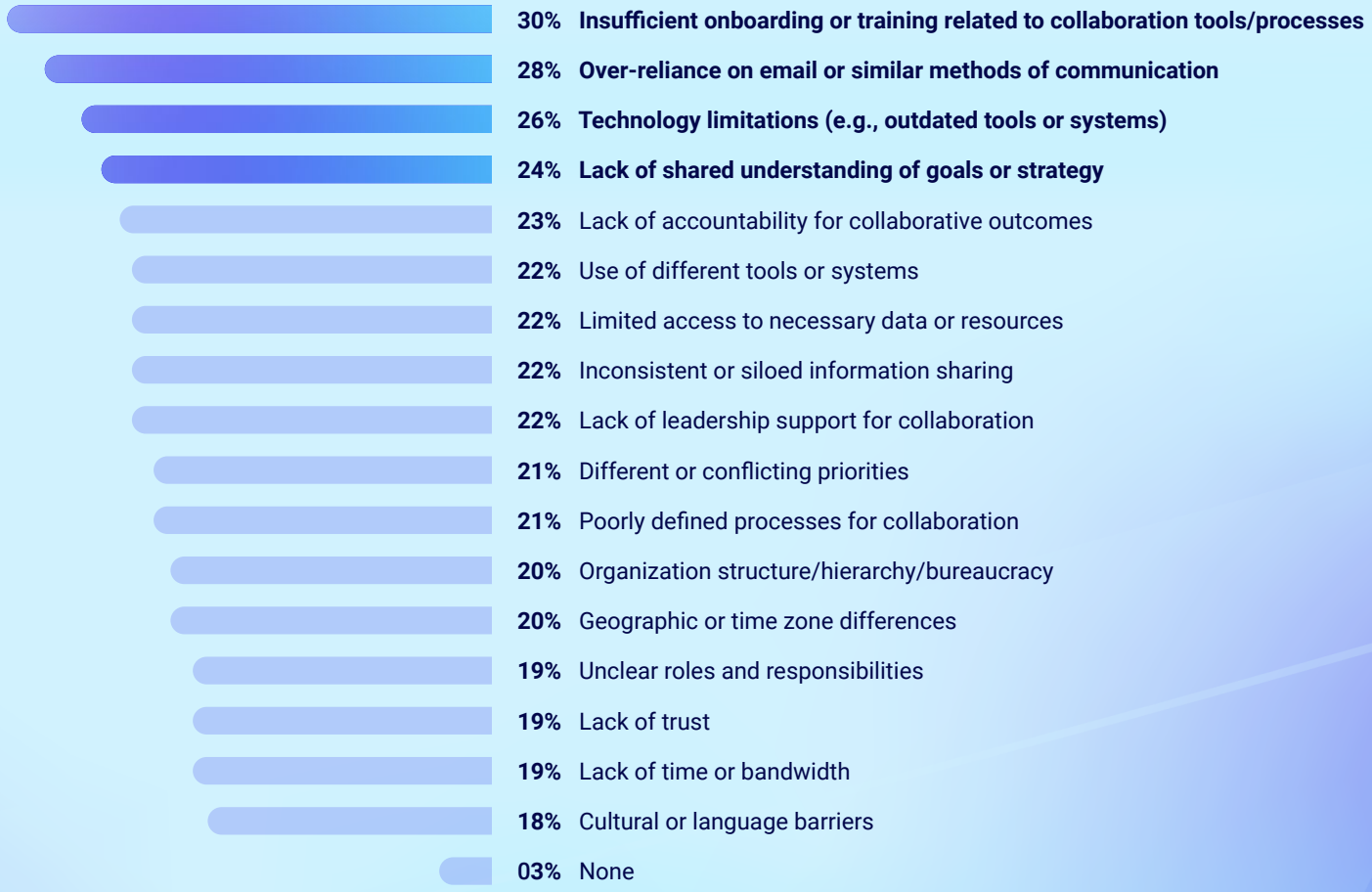
These results underscore a compelling message: **investing in knowledge work maturity pays off.** Organizations that build strong knowledge foundations not only outperform today, they also position themselves for sustained growth, resilience, and customer trust. And, for less mature organizations, the path forward is clear and promising. Every step toward maturity unlocks measurable value and moves the business closer to the performance levels achieved by industry leaders.

Basic obstacles to better knowledge work remain

As the wave of investment shows, organizations are committed to improving their management of knowledge work. And yet, basic problems that confront businesses in this area persist, unresolved.

Effective collaboration, for example, is still hampered by: inadequate training, reported by 30 percent of respondents, over-reliance on email, cited by 28 percent, technology limitations, reported by 26 percent, and lack of shared understanding of strategy, cited by 24 percent *(Figure 36)*.

Barriers to effective collaboration

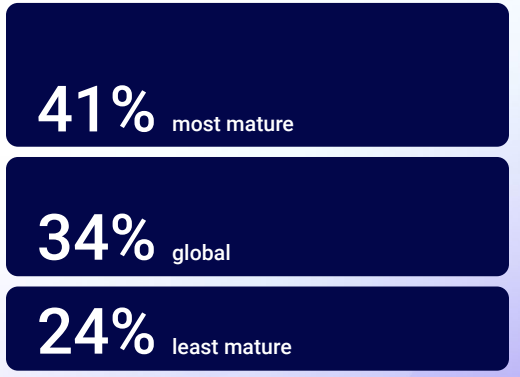


And, while 86 percent of organizations — and more than 90 percent of the most mature cohort — are extremely or very confident that they can find the knowledge they need, they do not necessarily find it quickly. End users spend an average of 37 minutes a day searching for information, and nearly half of organizations report that between 30 minutes and 2 hours are needed *(Figure 32).* This represents a significant cumulative drag on performance.

Although organizations at all levels of maturity report difficulties with collaboration, those at the more mature end of the spectrum appear to be most sensitive to them. Across all the areas of difficulty cited in the survey, respondents in mature KWOs were more likely to identify these as problems they were currently facing *(Figure 39).* This may reflect both the high value that mature organizations place on collaboration and the higher expectations they have of their tech stacks.

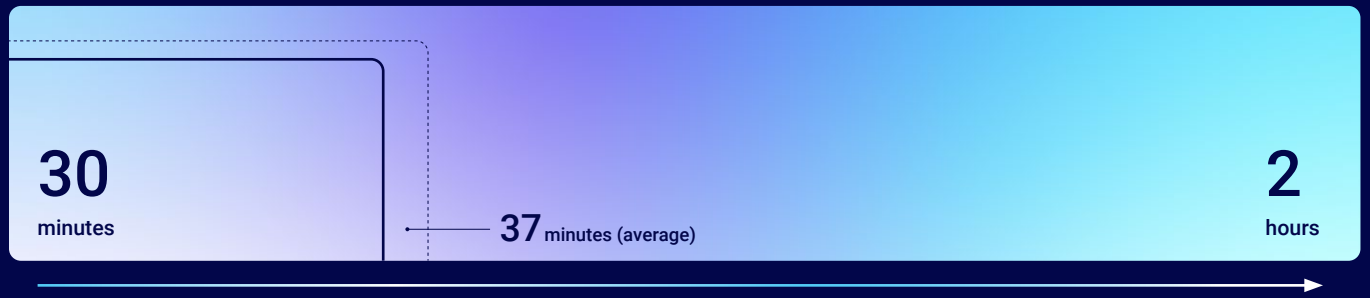
Perhaps counterintuitively, AI looks set to amplify these concerns. Mature organizations, for example, are more likely to anticipate that AI will require collaboration between new and existing roles *(Figure 115).* Again, this may be due to the high value they place on collaboration, but it is also in keeping with their greater tendency to see AI as transformative. (We talk more about this in a later section.) In any event, the need for organizations to embed basic collaborative mechanisms is unlikely to diminish.

Belief AI will require collaboration between new and existing roles



86% extremely/very confident in finding information they need but **not necessarily finding it quickly**

Time spent searching for information



What features should a DMS have? All of them.

If collaboration is hard to maximize, it is not for want of technological help. We reported earlier that about two-thirds of organizations are actively using all 27 DMS features named in the survey. It seems you simply cannot have too much functionality. But the variation is striking between businesses at different levels of knowledge work maturity, and between regions.

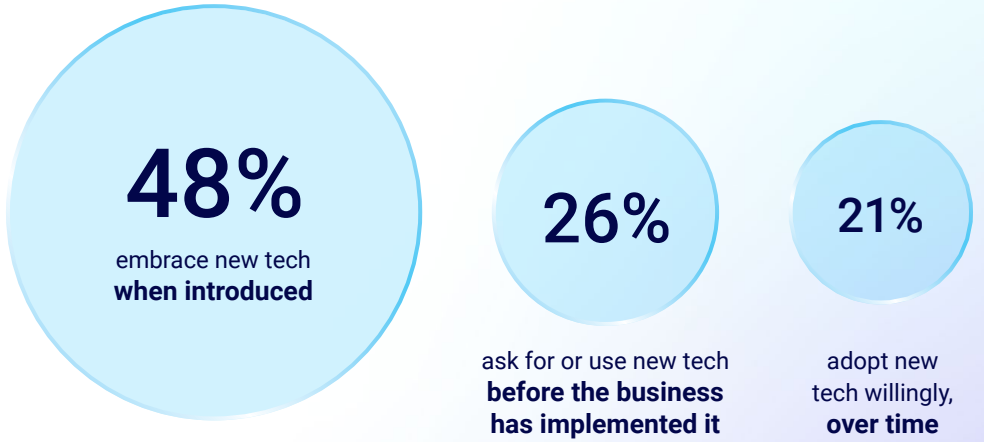
For example, North American organizations are more likely than their counterparts to use nearly all features, followed by the UK and APAC *(Figure 42)*.

In addition, the greater an organization's knowledge work maturity, the more likely it is to use any given feature *(Figure 46)*.

For decision-makers in less mature businesses, a strategy emerges. To push their organization along the maturity curve, invest in more features and in the training and policies needed to maximize their use.

Must-haves for the most mature KWOs are integration of the following:

- **78%** Document, email, and chat communications
- **77%** Internal collaboration tools, such as shared workspaces, real-time editing and messaging
- **75%** Centralized storage of documents, briefs and contracts
- **75%** Direct access to research tools, databases, and external repositories
- **75%** Customizable data access rights for clients



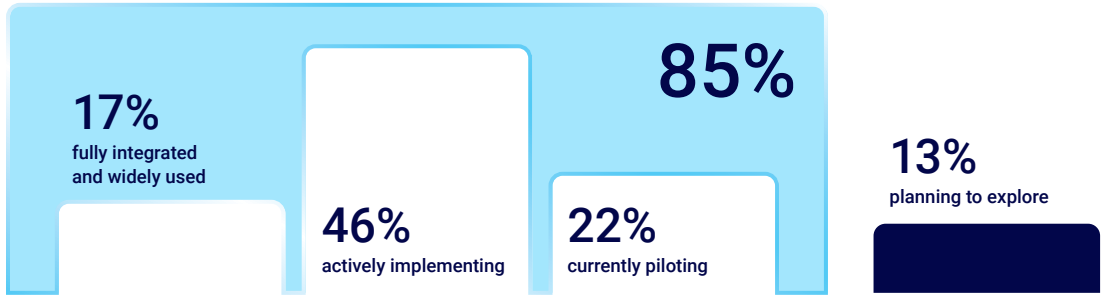
Interestingly, knowledge-mature organizations may face pressures in tech adoption that less mature companies do not.

In particular, end users may be such enthusiastic adopters that they run ahead of the company. And the findings suggest that the more mature organizations may have created a tech-forward culture that encourages this phenomenon. While 26 percent of businesses say end users are asking for, or even using, new tech before the business has implemented it, the most mature organizations are three times more likely than the least mature to report this pattern of adoption.

Conversely, end users in the least mature businesses are far more likely to adopt new systems over time *(Figure 68)*.

On one hand, end users' tech impatience carries clear data and security risks for mature companies, especially when it comes to AI. But equally, putting a damper on enthusiasm is seldom the best response. Thus, the need for sound tech governance has never been greater.

State of AI adoption



Nearly all businesses are embracing AI — but few have fully integrated it.

Although 85 percent of respondents say they are piloting, implementing, or using AI, only 17 percent of that number say their AI tools are fully integrated and widely used *(Figure 70B)*. This serves as a reminder that — despite its salience in the global conversation — AI remains a new technology for most users.

Natural language queries to find documents or information are the most popular AI use case, reported by more than half of organizations *(Figure 70A)*. As businesses become more advanced, they also become more likely to use AI across a range of activities. In the case of natural language queries, for example, the usage rate among mature organizations is about 58 percent, compared with 42 percent at the opposite end of the spectrum *(Figure 73)*.

These wider divergences are also apparent elsewhere, especially in sophisticated use cases. Some 55 percent of the most advanced organizations use AI to spot risks, errors, or anomalies in documents, compared with 34 percent of the least advanced. Businesses at higher maturity levels are also nearly twice as likely to integrate AI into client-facing tools: 46 percent versus 24 percent *(Figure 73)*.

Client, customer, and end user needs shape AI adoption

The extent to which advanced organizations' use of AI is influenced by customer needs is one of the most striking findings of this research. While customers influence AI usage among 57 percent of businesses overall, the figure ranges from 20 percent of the least mature organizations to 74 percent of the most mature *(Figure 91)*.

The most mature businesses are also far less likely to have been urged by customers to curb their use of AI, while the least mature are more likely to report periodic demands for usage restrictions. This suggests a greater level of customer trust in advanced knowledge work organizations, possibly correlating with the greater customer retention these businesses enjoy. It appears confidence in knowledge work breeds confidence among clients and customers.

57% cite AI usage influenced by **customer needs**

What about the end users' perspective? Here, productivity or efficiency gains are the most important reason cited for using AI, with risk and cost reductions at the bottom *(Figure 79A)*. A surprising finding, given that greater productivity should, in principle, result in lower costs.

One possible explanation is that respondents construe improved productivity as the delivery of higher-value work or of a better work-life balance, with cost reduction being viewed as a secondary benefit. Whatever the rationale, the lower priority placed on cost reductions is a bit unexpected, given industry commentators' assertions that AI will slash overheads.

Governance is a serious concern with AI

36% report **document policy violations** due to AI

Despite the greater trust their customers place in them, even mature KWOs sometimes restrict their AI usage in response to customer demand. This caution is justified: 36 percent of all respondents say they have experienced a data leak, security breach, or regulatory non-compliance due to unregulated or publicly available AI tools. Some 30 percent say that security concerns led them not to adopt some AI tools, while 20 percent say they delayed adoption. *(Figure 95)*

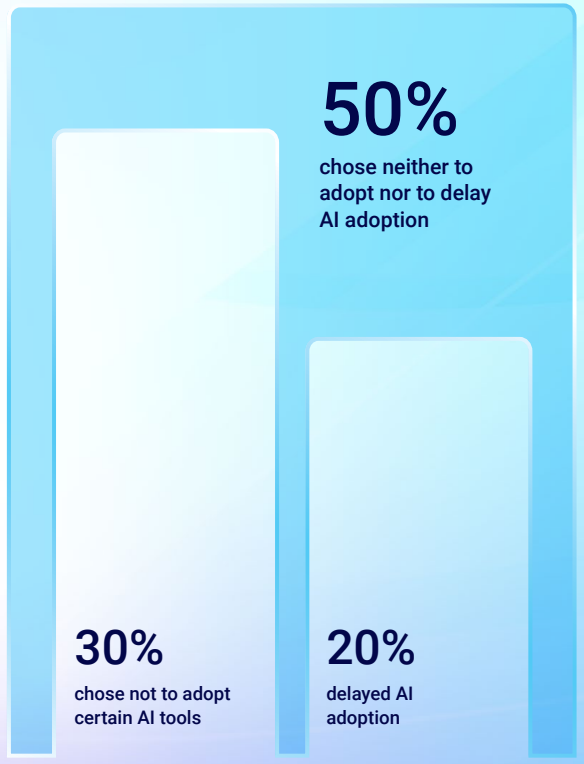
Knowledge work maturity offers some protection, albeit with caveats. Policy violations caused by AI tools least affect both the most **and** the least mature (28 percent and 33 percent, respectively). The most affected are maturing companies — those in the middle of the maturity spectrum — where nearly 40 percent report them *(Figure 98)*. These may be organizations piloting AI tools yet still building the security and governance expertise necessary to manage the risks that come with adoption.

25% report publicly available AI usage **with little oversight**

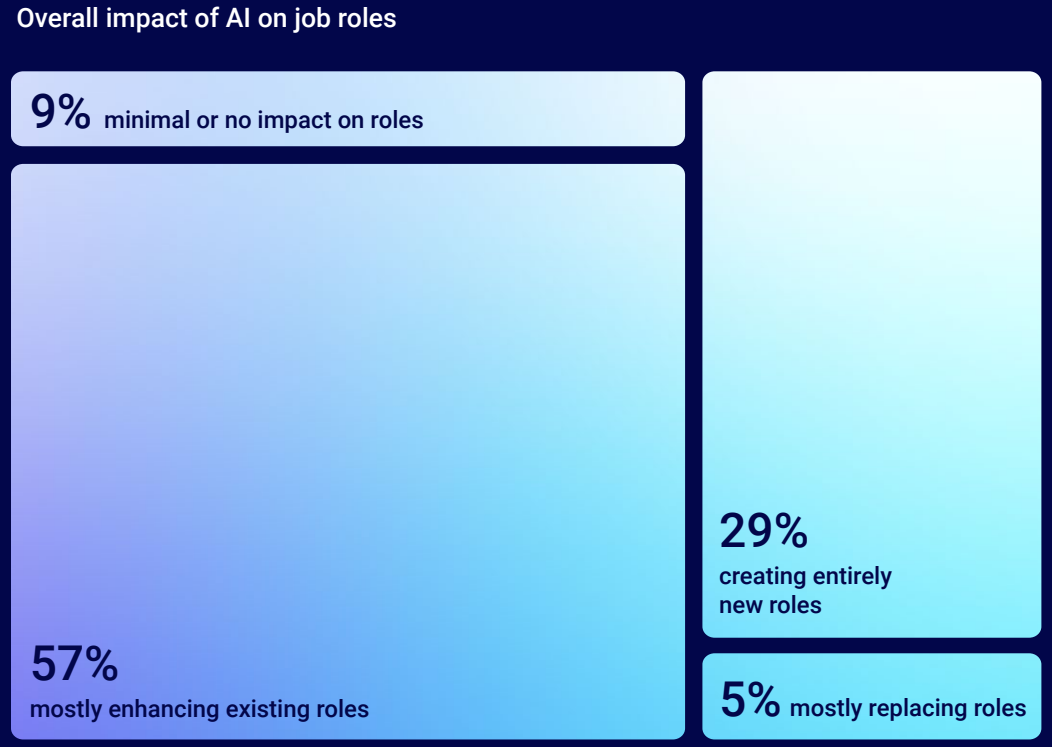
Supporting this interpretation is the fact that the most advanced organizations are most likely to say that they chose to delay (rather than cancel) adoption of certain tools or decided that security was not a major factor *(Figure 102)*. Both imply greater expertise in security. They are also more likely to regard any particular security concern as important, although, as is the pattern with all organizations, no single concern stands out as demanding greater attention *(Figure 107)*.

Governance is clearly a weak spot for many organizations. Despite the prevalence of policy violations, some 25 percent say their employees use publicly available AI with little oversight *(Figure 77)*. The presence of "shadow AI" operating outside of oversight from the compliance function poses obvious risks.

Security concern impact on AI adoption



Advanced organizations anticipate entirely new roles for their staff



AI is a magnet for job market doom-mongers who warn of an impending apocalypse for knowledge workers. Yet the research paints a more upbeat picture. More than half (57%) of respondents say AI is mainly enhancing existing roles, while more than a quarter (29%) say it is creating entirely new roles *(Figure 108A)*.

Respondents' predictions once again depend on their knowledge work maturity: less mature organizations are far more likely to experience enhancement of existing roles, while the most mature lean toward the creation of novel roles *(Figure 111)*. One possible explanation is that, while less mature companies are looking to AI to address existing work, advanced organizations understand it can help them take on new and different work.

As mentioned previously, key AI impacts include the automation of administrative tasks (59%) and enhanced productivity achieved by generating first drafts and edits, and detecting risks in contracts (58%). Some 34 percent, meanwhile, foresee greater collaboration between new and existing roles — underscoring the need to address any collaboration issues without delay *(Figure 108B)*.

The future is full of possibilities

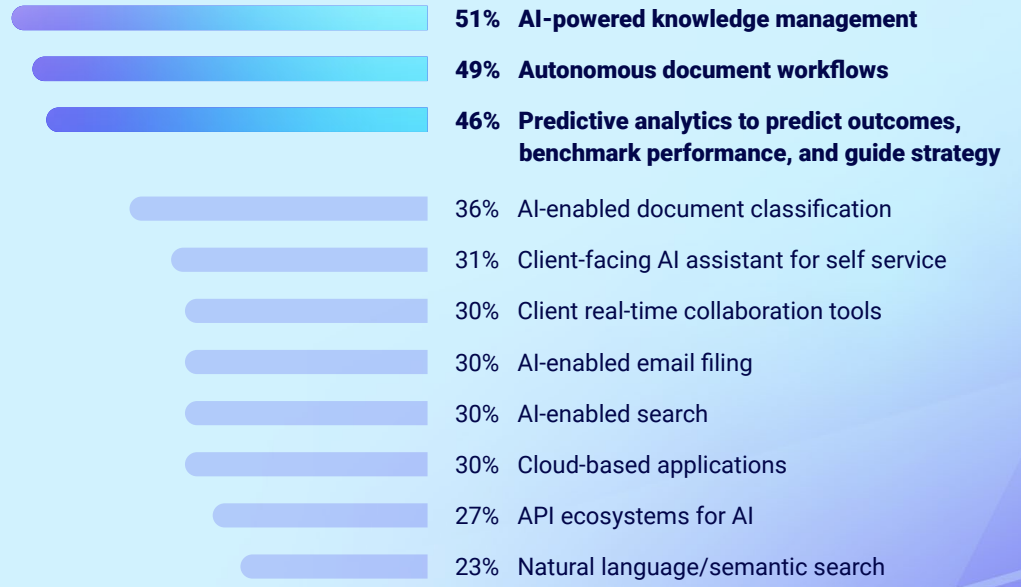
AI is currently a key focus for organizations, but what are their future investment priorities?

Over the next three years, AI-powered knowledge management is identified as a top priority, cited by 51 percent of respondents. It is followed by autonomous document workflows (49%) and predictive analytics (46%) *(Figure 118A)*. Unsurprisingly, the more advanced an organization, the more likely it is to anticipate investment in cutting-edge technologies.

Interestingly, while the least mature organizations anticipate making moderate improvements to existing tools, the most mature are more likely to stick with their current systems *(Figure 128)*. If that seeming lack of adventurousness is surprising, the likely interpretation is that these businesses have confidence in the foundations they have established, enabling them to focus on more groundbreaking investments in AI.

More than two-thirds of respondents anticipate significant or transformational impact from multiple trends over the same period, ranging from global AI regulation to convergence of professional services. Again, the more mature an organization is, the more likely it is to foresee such impact. For example, 77 percent of the most mature organizations expect massive impact from AI regulation, compared with 44 percent of the least mature *(Figure 125)*.

Top priority investment areas



80%+

expect positive AI impact globally

The pattern repeats itself over a 10-year horizon.

Asked about four radical scenarios — such as "autonomous firms" in which AI agents handle documents while humans manage strategy — nearly all respondents view them as somewhat or highly likely. But about two-thirds of the most mature KWOs see them as highly likely, compared with just over a third of the least mature *(Figure 133)*.

Although decision-makers in the most mature KWOs express the highest confidence that these scenarios will benefit their business, this optimism resonates worldwide. More than 80 percent of global respondents anticipate a positive impact and look ahead with expectation rather than apprehension *(Figure 138)*.

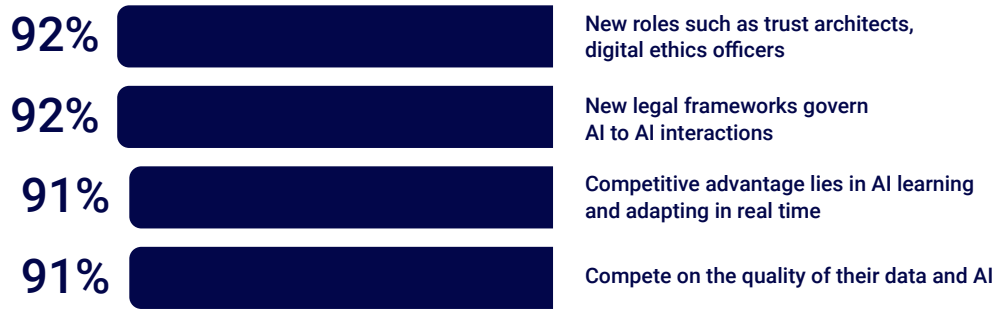
Other future scenarios reveal a similar pattern of responses and reinforce several broader themes from this research.

More than 90 percent of respondents expect new roles to emerge, such as trust architects or digital ethics officers, demonstrating widespread readiness for change *(Figure 143)*. As with other findings, while advanced KWOs are more likely to see these developments as imminent, those at less mature organizations also express strong alignment with this vision *(Figure 146)*.

When looking ahead to competitive dynamics, nearly two-thirds of the most advanced KWOs believe that business advantage will depend on the quality of a firm's data, the sophistication of its AI, and the ability of those systems to learn and adapt in real time. This compares with one-third of the least mature organizations, which are more focused on the rise of new roles and the creation of legal frameworks to govern AI-to-AI interactions *(Figure 146)*.

Taken together, these perspectives paint an encouraging picture. While the most mature organizations are already preparing to compete on data and adaptive intelligence, less mature organizations are actively engaging with the human, ethical, and governance dimensions of AI's evolution. Both are contributing in complementary ways to a responsible, forward-looking future.

Overall likelihood of scenarios occurring



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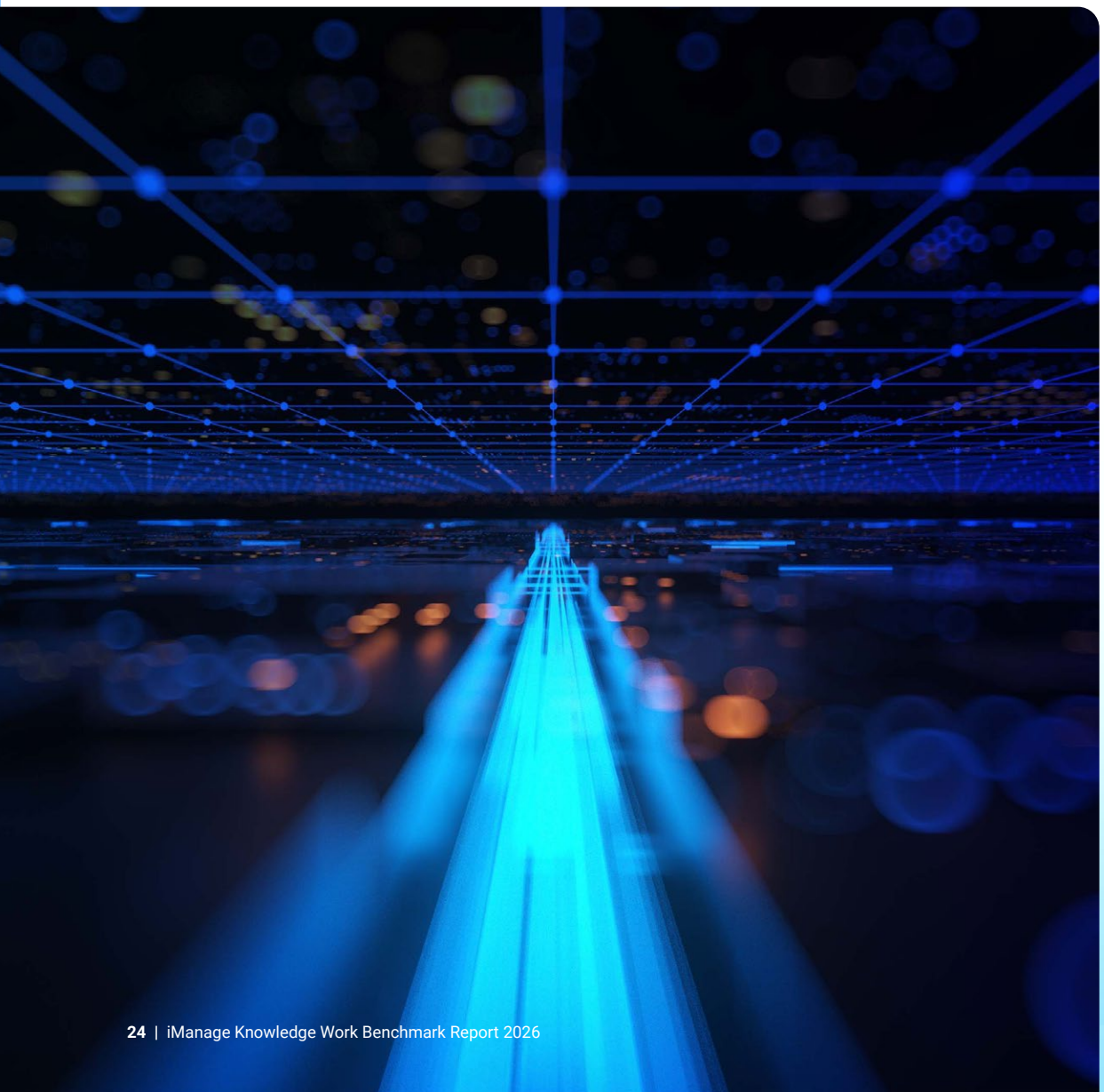
Conclusion



Conclusion: a roadmap to knowledge work maturity

When iManage created its Knowledge Work Maturity Model, it was already clear that, as the executive summary then noted, "mature knowledge work organizations are the future of work."

In the years since, AI has moved from the margins to the mainstream, and that conclusion holds true more than ever. As the wave of investment in new document management systems and transformative technologies shows, companies worldwide see a pressing need to improve their knowledge work systems.

And, as we've noted, the data show significant differences in the performance of the least mature and the most mature knowledge work organizations. Advanced KWOs are more likely to be profitable, see revenue growth, and enjoy strong customer retention.

How can decision-makers ensure that their organizations move along the maturity curve to reap these benefits? And how should they manage their AI investments?

The iManage research suggests six tips for future strategy

1 Get the basics right, then pursue transformative technologies.

Mature KWOs are more likely to continue to invest in their current document management systems. They are also more likely to invest in digital transformation when the time is right. The research suggests that these companies take a cautious approach as they know that collaborative working requires constant vigilance. Advanced companies are more aware of potential problems and have higher expectations of their tech stacks. For all the excitement around AI, fewer than one in five companies have fully integrated their AI tools, so far.

2 Ensure end users realize the full potential of the tech stack.

Mature KWOs report that their users are more likely to use DMS features. Capable, well-trained end users also drive adoption of more sophisticated technologies — though companies need to beware of the attendant risk of "shadow AI."

3 Pay close attention to your customers.

More mature KWOs report that their customers play an important role in their AI strategy, and they are less likely to report the incidence of "restrictive" customers compared with less mature KWOs. This is an added benefit for organizations with greater knowledge work maturity: enabling and influencing customers.

4 Don't neglect governance.

A quarter of respondents say they allow employees to use publicly available AI without oversight, and more than a third of respondents have suffered policy violations. As AI comes under closer regulatory scrutiny, such risks will become even less tenable. The greatest risks come as companies strive to move along the maturity curve. The ultimate pay-off is that, for the most advanced KWOs, superior security opens broader tech possibilities.

5 Be open to the emergence of new roles.

Mature KWOs expect AI to bring about big changes in the jobs people do. Team leaders need to be knowledge strategists as well as expert technology users.

6 Prepare for change — and be positive.

AI agents doing all the grunt-work? Trust as a service? There's no consensus on what the future holds, but globally, KWOs expect transformative change and see it as positive. A little scenario-planning — with a sprinkle of optimism — may be in order.

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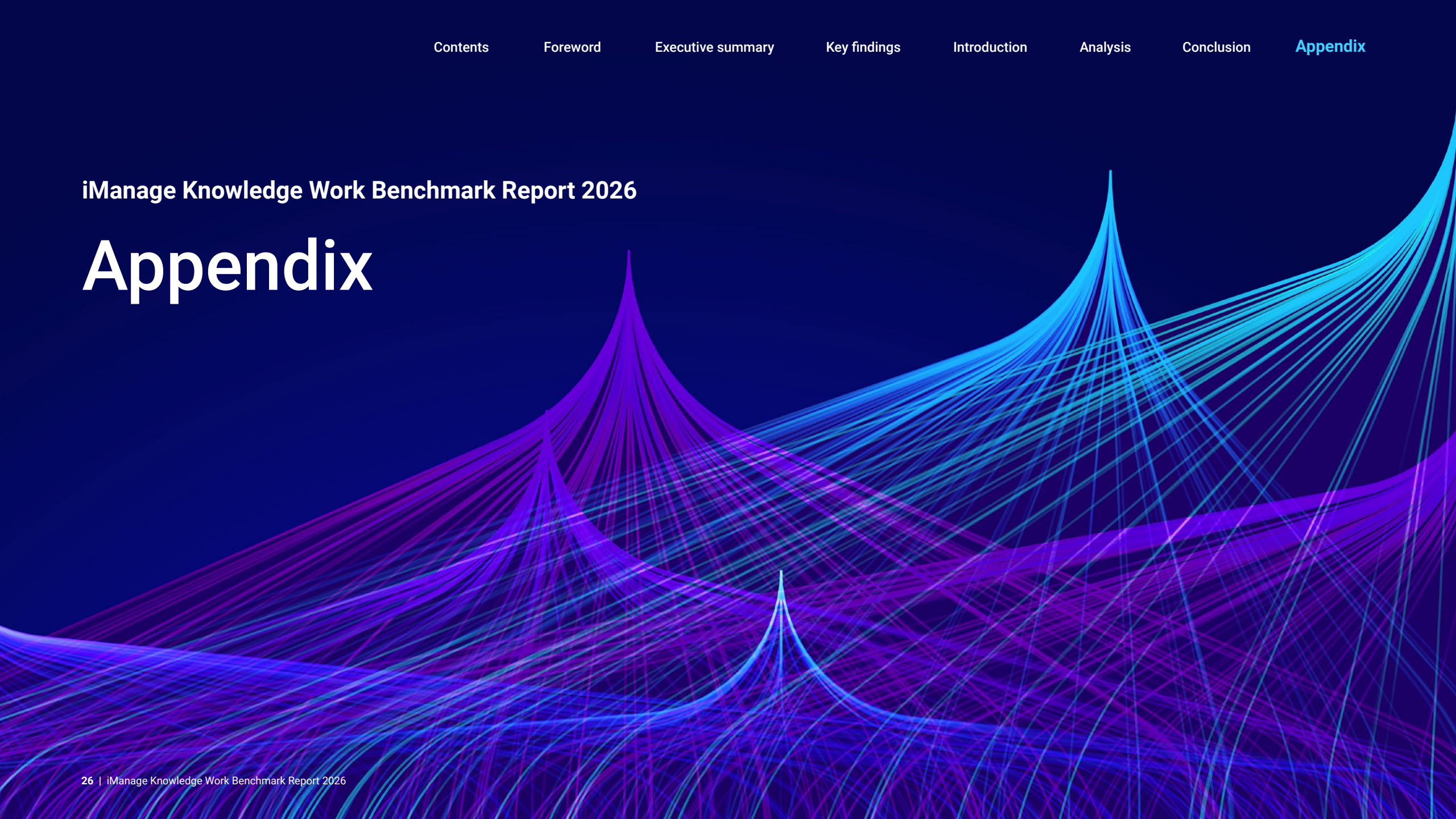
Appendix



Let's get familiar with the five phases of knowledge work maturity.

We would like to remind you at this stage that we set a high bar to be part of the study. Only knowledge work organizations that have already committed to knowledge work as a discipline are included. Everyone is already on an informed, deliberate journey to maturity.

Each phase of the Knowledge Work Maturity Model™ should be viewed as a mindset. Each phase is defined by a spectrum of investments made, attitudes expressed, and behaviors exhibited.

Seeker

In this stage, KWOs are focused on securing documents and protecting the information and data they have to build a foundation for a more sophisticated knowledge work strategy in the future.

Practitioner

Here, KWOs have successfully evolved to more sophisticated and collaborative approaches to knowledge work and are focused on servicing their customers proactively, effectively, and profitably.

Established

KWOs at this level of maturity are ready to pursue scale and diversification because they have consistently invested in technology, training, and people to build what they consider best-in-class employee and customer experiences.

Expert

At the expert stage, KWOs are truly digital-first, ready to experiment with AI and ensure that diverse knowledge is valued, documented, and used to drive profitable growth for both the organization and its clients.

Pioneer

This stage is the domain of KWOs that are single-mindedly pursuing collective intelligence with continuous innovation, diversity, and inclusion, and they are nurturing a culture where employees meet personal goals, clients enjoy superior value, and the organization's market value grows.

Figure 3 Countries included in research

North America		UK	Western Europe					Southern Europe			
											
US	Canada	UK	Austria	Belgium	Germany	Netherlands	Switzerland	France	Italy	Portugal	Spain

Nordics				LatAm				APAC					
													
Denmark	Norway	Finland	Sweden	Argentina	Brazil	Colombia	Mexico	Australia	New Zealand	India	Japan	Singapore	South Korea

Figure 4 Sample criteria

To participate in the survey, respondents were required to meet the following criteria

Must be in the following verticals

- Accounting/Tax
- Financial Services/ Asset Management
- Legal/Law Firms

Must be in one of the following job functions

- Legal
- Compliance
- Accounting
- Tax
- IT
- Strategy/ Innovation

Other criteria

- Must be a decision maker or influencer for document management solutions, either within a business functional area (BDM) or technical (IT) function (TDM)
- All companies must access, manage, store, or use important documents
- Must have at least 10 employees: Small 10–50, Medium 51–250, Large 251–1000, Enterprise 1001–4999, Large Enterprise 5000+
- Respondents must be employed full time and have been at their current company for at least a year

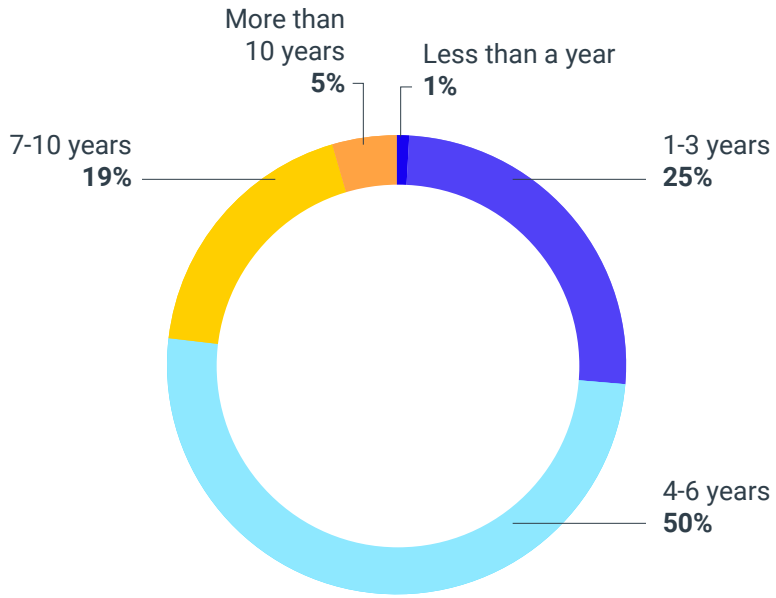
Methodology

20-minute online survey

Fieldwork conducted: **September – October 2025**

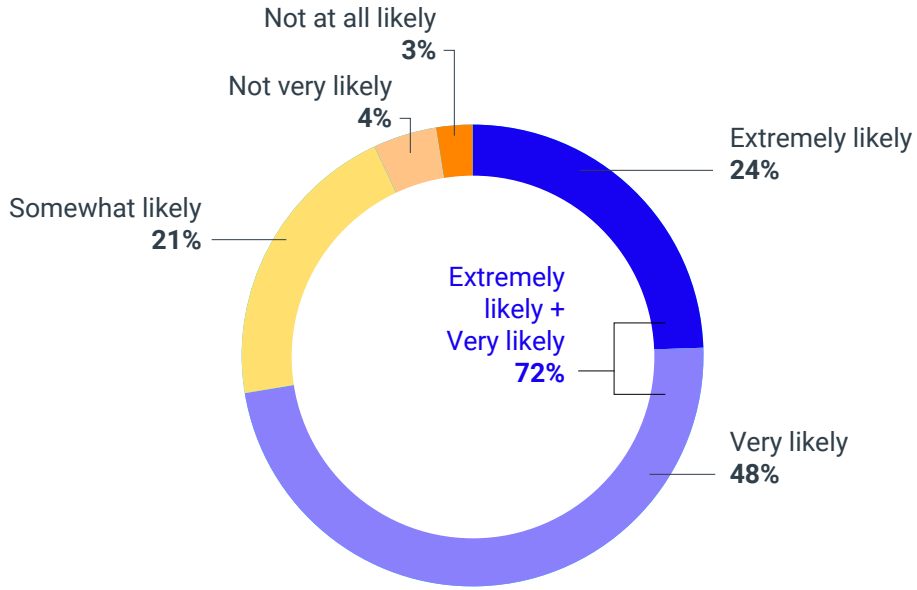
Figure 22 Document management solutions

A. How long used current document management solution



How long has your firm been using its current document management solution(s)?

B. Likelihood for new document management solution in next two years



How likely is your firm to implement a new document management solution in the next 2 years?

Figure 25 Time using current document management solution

		Knowledge maturity level				
	Overall	Seeker (A)	Practitioner (B)	Established (C)	Expert (D)	Pioneer (E)
Less than a year	1%	0%	1%[D]	1%	0%	1%
1-3 years	25%	25%	24%	26%	29%	27%
4-6 years	50%	60%[CD]	54%[CD]	46%	44%	51%
7-10 years	19%	10%	18%[A]	21%[AE]	20%[A]	14%
More than 10 years	5%	3%	3%	6%[B]	7%[B]	7%[B]
Average # of years	**5.2**	**4.9**	**5.1**	**5.3[AB]**	**5.3[A]**	**5.2**

How long has your firm been using its current document management solution(s)?

Blue letters indicate significantly higher at 95% confidence level

Figure 26 Likelihood to implement new document management solution in next two years

		Region						
	Overall	North America (A)	UK (B)	Western Europe (C)	Southern Europe (D)	Nordics (E)	LatAm (F)	APAC (G)
Extremely/Very likely	**72%**	**65%**	**69%**	**70%**	**68%**	**75%[AD]**	**76%[ABCD]**	**80%[ABCDE]**
Extremely likely	**24%**	19%	23%	22%	25%[A]	23%	26%[A]	30%[ABCE]
Very likely	**48%**	46%	45%	48%	43%	52%[D]	50%[D]	50%[D]
Somewhat likely	**21%**	27%[BCEFG]	20%	21%[G]	22%[G]	20%[G]	21%[G]	16%
Not very likely	**4%**	5%[F]	7%[EFG]	6%[EFG]	6%[EFG]	3%	2%	3%
Not at all likely	**3%**	3%[F]	5%[EFG]	3%[EF]	3%[F]	1%	0%	2%[F]

How likely is your firm to implement a new document management solution in the next 2 years?

Blue letters indicate significantly higher at 95% confidence level

Figure 27 Likelihood to implement new document management solution in next two years

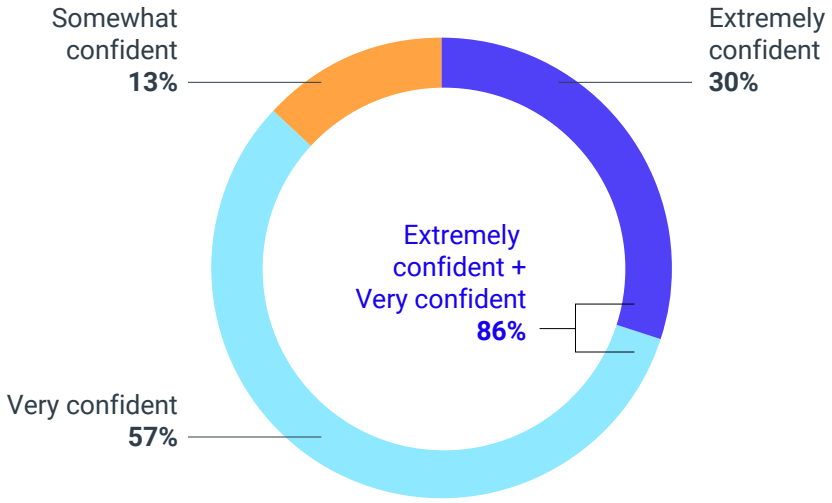
	Overall	Knowledge maturity level				
		Seeker (A)	Practitioner (B)	Established (C)	Expert (D)	Pioneer (E)
Extremely/Very likely	 **72%**	**45%**	**73%[A]**	**73%[A]**	**79%[ABC]**	**84%[ABC]**
Extremely likely	 **24%**	9%	19%[A]	30%[AB]	32%[AB]	39%[ABC]
Very likely	 **48%**	36%	53%[ACD]	43%[A]	47%[A]	45%
Somewhat likely	 **21%**	40%[BCDE]	21%[DE]	20%[DE]	15%	11%
Not very likely	**4%**	10%[BCDE]	4%	4%	3%	2%
Not at all likely	**3%**	3%	2%	3%	2%	3%

How likely is your firm to implement a new document management solution in the next 2 years?

Blue letters indicate significantly higher at 95% confidence level

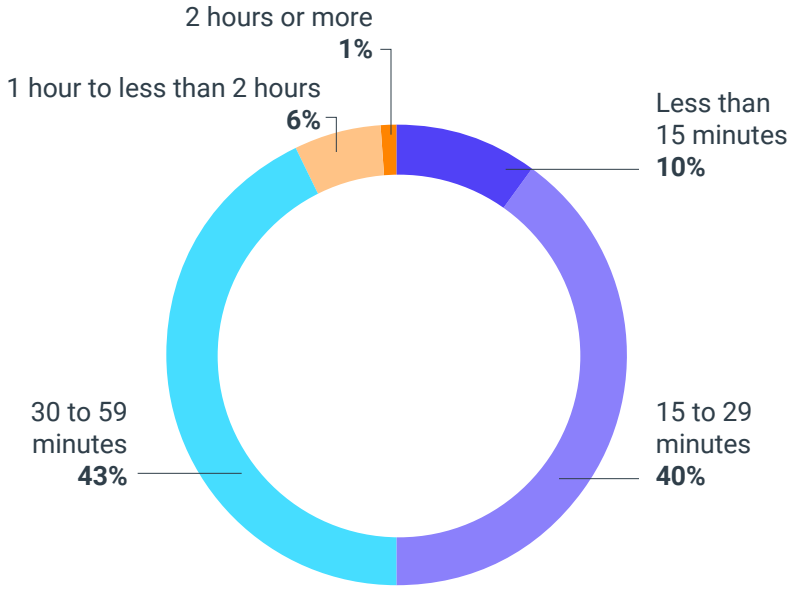
Figure 29 End users

A. Confidence in finding the needed knowledge



How confident are you that end users in your firm are able to find and reuse knowledge?

B. Time spent looking for information



How much time on average do you think an end user in your organization spends searching for information on a typical day?

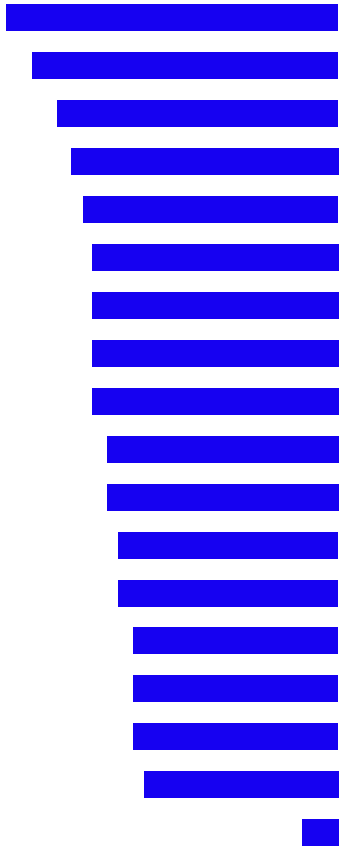
Figure 32 Confidence in finding the needed knowledge

		Knowledge maturity level				
	Overall	Seeker (A)	Practitioner (B)	Established (C)	Expert (D)	Pioneer (E)
Extremely/Very confident	 **86%**	**61%**	**84%[A]**	**91%[AB]**	**91%[AB]**	**95%[ABC]**
Extremely confident	 **30%**	10%	26%[A]	34%[AB]	35%[AB]	46%[ABCD]
Very confident	 **57%**	51%	59%[AE]	57%	56%	49%
Somewhat confident	 **13%**	37%[BCDE]	16%[CDE]	9%[E]	9%	5%
Not very confident	**0%**	1%	0%	0%	0%	0%

How confident are you that end users in your firm are able to find and reuse knowledge?

Blue letters indicate significantly higher at 95% confidence level

Figure 36 Barriers to effective collaboration



30%	Insufficient onboarding or training related to collaboration tools/processes
28%	Over-reliance on email or similar methods of communication
26%	Technology limitations (e.g., outdated tools or systems)
24%	Lack of shared understanding of goals or strategy
23%	Lack of accountability for collaborative outcomes
22%	Use of different tools or systems
22%	Limited access to necessary data or resources
22%	Inconsistent or siloed information sharing
22%	Lack of leadership support for collaboration
21%	Different or conflicting priorities
21%	Poorly defined processes for collaboration
20%	Organization structure/hierarchy/bureaucracy
20%	Geographic or time zone differences
19%	Unclear roles and responsibilities
19%	Lack of trust
19%	Lack of time or bandwidth
18%	Cultural or language barriers
3%	None

Which of the following do you consider to be the primary barriers to effective collaboration across teams at your organization?

Figure 39 Barriers to effective collaboration

		Knowledge maturity level				
	Overall	Seeker (A)	Practitioner (B)	Established (C)	Expert (D)	Pioneer (E)
Insufficient onboarding or training related to collaboration tools/processes	**30%**	28%	28%	32%[B]	36%[B]	27%
Over-reliance on email or similar methods of communication	**28%**	23%	28%	29%	30%	28%
Technology limitations (e.g., outdated tools or systems)	**26%**	21%	22%	29%[AB]	31%[AB]	32%[AB]
Lack of shared understanding of goals or strategy	**24%**	23%	24%	25%	24%	25%
Lack of accountability for collaborative outcomes	**23%**	18%	22%	24%[A]	28%[ABEF]	19%
Use of different tools or systems	**22%**	18%	21%	24%[A]	23%	29%[AB]
Limited access to necessary data or resources	**22%**	20%	23%	22%	24%	22%
Inconsistent or siloed information sharing	**22%**	21%	21%	23%	24%	24%
Lack of leadership support for collaboration	**22%**	23%	21%	21%	23%	24%
Different or conflicting priorities	**21%**	16%	20%	23%[A]	23%[A]	22%
Poorly defined processes for collaboration	**21%**	22%	20%	21%	20%	23%
Organization structure/hierarchy/bureaucracy	**20%**	19%	20%	21%	20%	20%
Geographic or time zone differences	**20%**	16%	18%	22[AB]	20%	22%
Unclear roles and responsibilities	**19%**	19%	19%	18%	18%	22%
Lack of trust	**19%**	15%	19%	20%	19%	15%
Lack of time or bandwidth	**19%**	14%	17%	21%[AB]	20%[A]	18%
Cultural or language barriers	**18%**	13%	17%	20%[A]	17%	20%
None	**3%**	2%	2%	4%[B]	7%[ABC]	7%[AB]

Which of the following do you consider to be the primary barriers to effective collaboration across teams at your organization?

Blue letters indicate significantly higher at 95% confidence level

Figure 42 Features currently used: Have this feature/solution (1 of 2)

		Region						
	Overall	North America (A)	UK (B)	Western Europe (C)	Southern Europe (D)	Nordics (E)	LatAm (F)	APAC (G)
Systems that enable access to and sharing of content including best practices, templates and previous work	66%	70%[E]	68%[E]	66%	67%[E]	60%	65%	68%[E]
Dashboards and reports to provide insights across your data repository to make more data-driven decisions	66%	72%[CDEF]	69%[E]	65%	63%	61%	65%	68%[E]
Internal collaboration tools (e.g., shared workspaces, real-time editing, and messaging)	66%	70%[F]	69%	65%	67%	64%	62%	66%
Version control to track changes and maintain a document history	66%	69%	68%	64%	63%	64%	67%	68%
Centralized storage for documents, briefs, contracts, and files	66%	72%[CDEG]	68%[E]	66%[E]	66%[E]	59%	66%[E]	66%[E]
Content governance including the ability to control user access by document, folder or matter/project	65%	69%[DE]	67%[E]	66%[E]	63%	59%	64%	67%[E]
Advanced encryption and access controls to protect sensitive data	65%	71% [BCDEF]	64%	63%	64%	61%	64%	68%[E]
A system that facilitates the lifecycle of documents including the disposition per internal or regulatory compliance	65%	70%[CE]	65%	64%	64%	59%	69%[E]	64%
Tools for audit trails and secure storage of sensitive information	65%	70%[CDE]	64%	63%	63%	59%	65%	67%[E]
Integration of document, email and chat communications	65%	69%[DEF]	70%[CDEF]	63%	62%	59%	63%	67%[E]
AI-powered search for contextual results based on keywords, tags, or natural language queries	64%	65%	67%	66%	61%	61%	63%	68%[DE]
Customizable access rights for clients to maintain confidentiality	64%	68%[CD]	65%	61%	60%	63%	62%	70%[CDEF]
External collaboration and secure file sharing for working with clients/customers or others securely	64%	70%[CDEF]	67%[E]	64%	61%	59%	62%	66%[E]

Thinking about the way your firm manages documents, which of the following features/solutions does your firm currently use?

Blue letters indicate significantly higher at 95% confidence level

Figure 42 Features currently used: Have this feature/solution (2 of 2)

	Overall	Region						
		North America (A)	UK (B)	Western Europe (C)	Southern Europe (D)	Nordics (E)	LatAm (F)	APAC (G)
Compatibility with billing systems, time tracking tools, or CRM platforms	64%	65%E	69%EF	63%	64%	58%	62%	67%E
Automated workflows or functions for repetitive tasks	64%	68%EF	65%	62%	63%	61%	61%	68%CEF
Automated monitoring and threat detection to identify anomalous behaviors and ensure compliance with legal standards and data privacy laws	64%	63%	68%E	63%	61%	61%	66%	66%
Advanced search functionality to quickly locate documents	64%	70%BDEF	60%	65%E	61%	58%	63%	67%BDE
Direct access to research tools, databases, and external repositories	63%	71%BCDEF	63%	61%	63%	60%	60%	66%E
Repositories for storing and retrieving standardized templates	63%	64%E	65%E	62%E	65%E	56%	63%E	67%E
Automated tagging, categorization and enrichment of documents for efficient organization	63%	63%	64%	62%	59%	58%	66%DE	65%DE
The use of AI assistants to accelerate tasks (e.g., summarization, analysis, compare and synthesize information within content)	63%	62%	63%	66%D	59%	62%	62%	63%
Optimized for mobile devices to access resources securely on the go	62%	65%	59%	66%BDF	59%	61%	59%	64%
Unified interface for seamless knowledge, document and operational management	62%	60%	64%D	62%	57%	59%	64%D	66%DE
Ability to leverage AI to draft documents	62%	61%	61%	64%E	63%	58%	65%E	60%
Embedded resources and training modules to onboard new staff or educate teams about organization-specific knowledge assets	61%	62%	63%D	57%	56%	59%	66%CDE	64%CD
Predictive analytics to identify trends and recommend actions	61%	58%	60%	59%	57%	65%AD	59%	65%ACDF
Tools to identify subject-matter experts within the organization based on history or authored documents	60%	61%	64%E	59%	61%	55%	58%	60%

Thinking about the way your firm manages documents, which of the following features/solutions does your firm currently use?

Blue letters indicate significantly higher at 95% confidence level

Figure 46 Features currently used: Have this feature/solution (1 of 2)

		Knowledge maturity level				
	Overall	Seeker (A)	Practitioner (B)	Established (C)	Expert (D)	Pioneer (E)
Systems that enable access to and sharing of content including best practices, templates and previous work	**66%**	61%	64%	68%	72%	72%
Dashboards and reports to provide insights across your data repository to make more data-driven decisions	**66%**	54%	65%	68%	71%	70%
Internal collaboration tools	**66%**	62%	64%	66%	70%	77%
Version control to track changes and maintain a document history	**66%**	55%	65%	69%	68%	64%
Centralized storage for documents, briefs, contracts, and files	**66%**	63%	65%	65%	72%	75%
Content governance including the ability to control user access by document, folder or matter/ project	**65%**	62%	64%	65%	68%	74%
Advanced encryption and access controls to protect sensitive data	**65%**	60%	63%	67%	69%	71%
A system that facilitates the lifecycle of documents including the disposition per internal or regulatory compliance	**65%**	60%	64%	65%	69%	74%
Tools for audit trails and secure storage of sensitive information	**65%**	61%	64%	64%	69%	71%
Integration of document, email and chat communications	**65%**	55%	64%	65%	68%	78%
AI-powered search for contextual results based on keywords, tags, or natural language queries	**64%**	55%	64%	66%	68%	68%
Customizable access rights for clients to maintain confidentiality	**64%**	59%	62%	66%	67%	75%
External collaboration and secure file sharing for working with clients / customers or others securely	**64%**	58%	65%	65%	64%	66%
Compatibility with billing systems, time tracking tools, or CRM platforms	**64%**	52%	61%	67%	71%	69%

Thinking about the way your firm manages documents, which of the following features/solutions does your firm currently use?

Figure 46 Features currently used: Have this feature/solution (2 of 2)

		Knowledge maturity level				
	Overall	Seeker (A)	Practitioner (B)	Established (C)	Expert (D)	Pioneer (E)
Automated workflows or functions for repetitive tasks	**64%**	62%	63%	64%	67%	69%
Automated monitoring and threat detection to identify anomalous behaviors and ensure compliance with legal standards and data privacy laws	**64%**	53%	65%	62%	69%	71%
Advanced search functionality to quickly locate documents	**64%**	61%	62%	63%	68%	73%
Direct access to research tools, databases, and external repositories	**63%**	54%	63%	65%	62%	75%
Repositories for storing and retrieving standardized templates	**63%**	55%	61%	65%	70%	68%
Automated tagging, categorization and enrichment of documents for efficient organization	**63%**	57%	61%	63%	68%	68%
The use of AI assistants to accelerate tasks	**63%**	55%	62%	64%	66%	65%
Optimized for mobile devices to access resources securely on the go	**62%**	57%	62%	60%	68%	74%
Unified interface for seamless knowledge, document and operational management	**62%**	52%	61%	63%	65%	62%
Ability to leverage AI to draft documents	**62%**	51%	61%	62%	64%	70%
Embedded resources and training modules to onboard new staff or educate teams about organization-specific knowledge assets	**61%**	50%	60%	64%	62%	70%
Predictive analytics to identify trends and recommend actions	**61%**	45%	61%	62%	62%	66%
Tools to identify subject-matter experts within the organization based on history or authored documents	**60%**	55%	59%	60%	63%	62%

Thinking about the way your firm manages documents, which of the following features/solutions does your firm currently use?

Figure 49 Revenue trajectory

	Overall	Knowledge maturity level				
		Seeker (A)	Practitioner (B)	Established (C)	Expert (D)	Pioneer (E)
Change from last year						
Higher than last year	**61%**	39%	57%[A]	65%[AB]	75%[ABC]	77%[ABC]
About the same as last year	**37%**	57%[BCDE]	41%[CDE]	34%[DE]	25%	23%
Less than last year	**2%**	4%[DE]	2%[D]	2%	1%	1%
Expectations for next year						
Higher than this year	**69%**	44%	68%[A]	71%[A]	76%[AB]	83%[ABC]
About the same as this year	**30%**	51%[BCDE]	30%[DE]	29%[E]	24%	17%
Less than this year	**1%**	4%[CD]	2%[CD]	0%	1%	0%

Compared to last year, how has your company's revenue changed?
How do you expect your company's revenue to change next year?

Blue letters indicate significantly higher at 95% confidence level

Figure 50 Revenue performance

	Overall	Knowledge maturity level				
		Seeker (A)	Practitioner (B)	Established (C)	Expert (D)	Pioneer (E)
Current performance						
Profit	**74%**	54%	72%[A]	78%[AB]	83%[ABC]	81%[AB]
Break-even	**24%**	42%[BCDE]	27%[CDE]	22%[D]	17%	17%
Loss	**1%**	2%	2%[CD]	0%	0%	1%
Performance relative to competitors						
We are in the top 25%	**21%**	7%	20%[A]	20%[A]	29%[ABC]	28%[ABC]
Above average	**53%**	41%	53%[A]	57%[AD]	50%[A]	58%[A]
Average	**24%**	45%[BCDE]	24%[E]	21%[E]	21%[E]	13%
Below average	**2%**	6%[BCDE]	2%[D]	1%	1%	1%
Bottom 25%	**0%**	0%	1%	0%	0%	0%

Is your company currently operating at a profit, break-even, or loss?

Compared to other companies in your industry, how would you rate your company's financial performance?

Blue letters indicate significantly higher at 95% confidence level

Figure 51 Employee trajectory

	Overall	Knowledge maturity level				
		Seeker (A)	Practitioner (B)	Established (C)	Expert (D)	Pioneer (E)
Change from last year						
More employees than last year	**56%**	34%	54%[A]	59%[AB]	64%[AB]	60%[A]
About the same as last year	**42%**	61%[BCDE]	43%[D]	40%[D]	33%	38%
Fewer employees than last year	**3%**	5%[C]	3%[C]	2%	3%	2%
Expectations for next year						
More employees than this year	**64%**	34%	54%[A]	59%[AB]	64%[AB]	60%[A]
About the same as this year	**34%**	61%[BCDE]	43%[D]	40%[D]	33%	38%
Fewer employees than this year	**2%**	5%[C]	3%[C]	2%	3%	2%

Compared to last year, how has the number of employees at your company changed?

How do you expect the number of employees at your company to change next year?

Blue letters indicate significantly higher at 95% confidence level

Figure 52 Customer retention rate

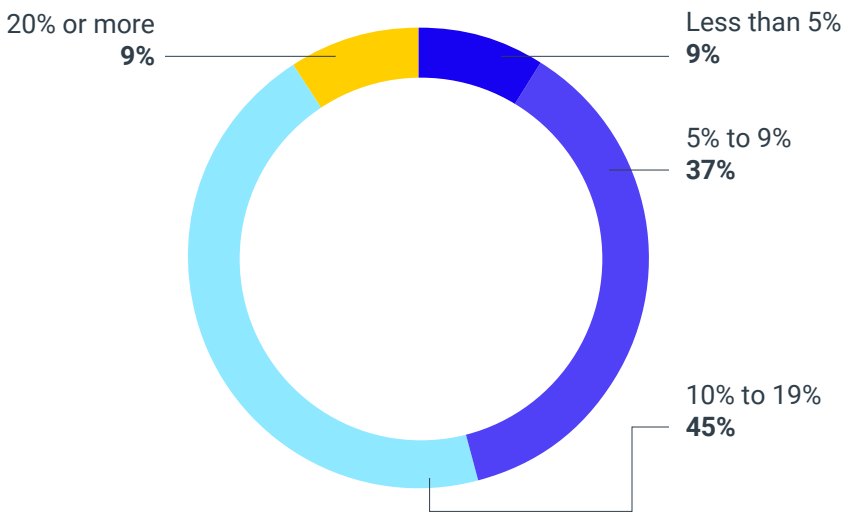
		Knowledge maturity level				
	Overall	Seeker (A)	Practitioner (B)	Established (C)	Expert (D)	Pioneer (E)
Less than 50%	**2%**	2%	2%	1%	1%	3%
50% to 64%	 **17%**	20%	17%	18%	15%	25%[BCD]
65% to 79%	 **34%**	37%[DE]	37%[DE]	34%[DE]	25%	22%
80% to 89%	 **36%**	32%	34%	38%	40%	34%
90% or higher	 **11%**	8%	10%	10%	18%[ABC]	15%[A]

What is your organization's approximate customer retention rate (i.e., the percentage of customers you retain year over year)?

Blue letters indicate significantly higher at 95% confidence level

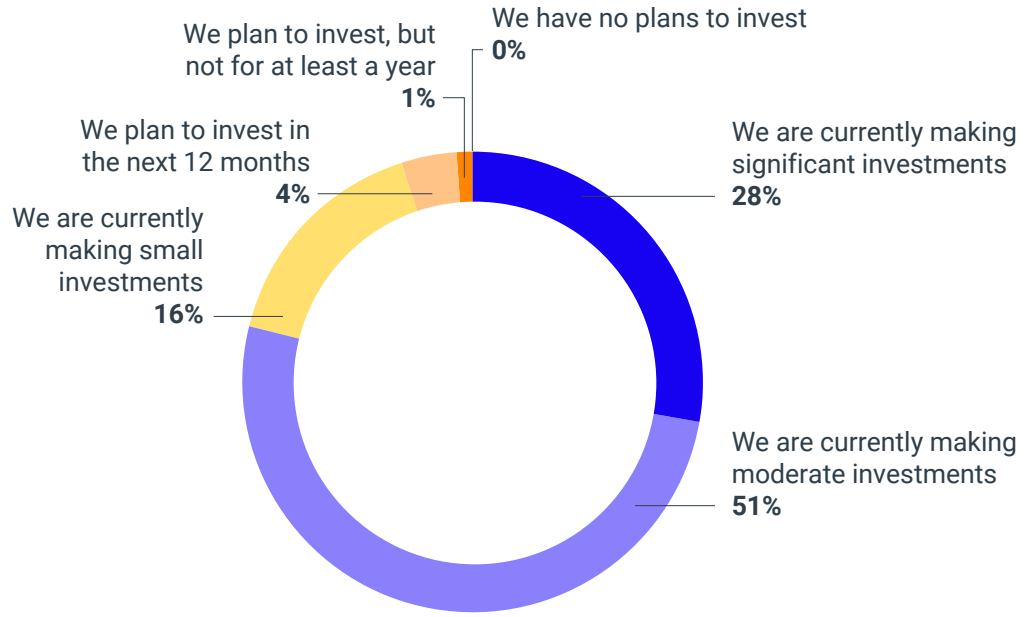
Figure 53 Investment

A. Budget allocated to innovation



What percentage of your company's overall budget is allocated to innovation, new technology, and R&D (research and development)?

B. Investment in digital transformation



How would you characterize your company's investment in digital transformation, tools, AI (artificial intelligence) and automation?

Figure 59 Investment in digital transformation

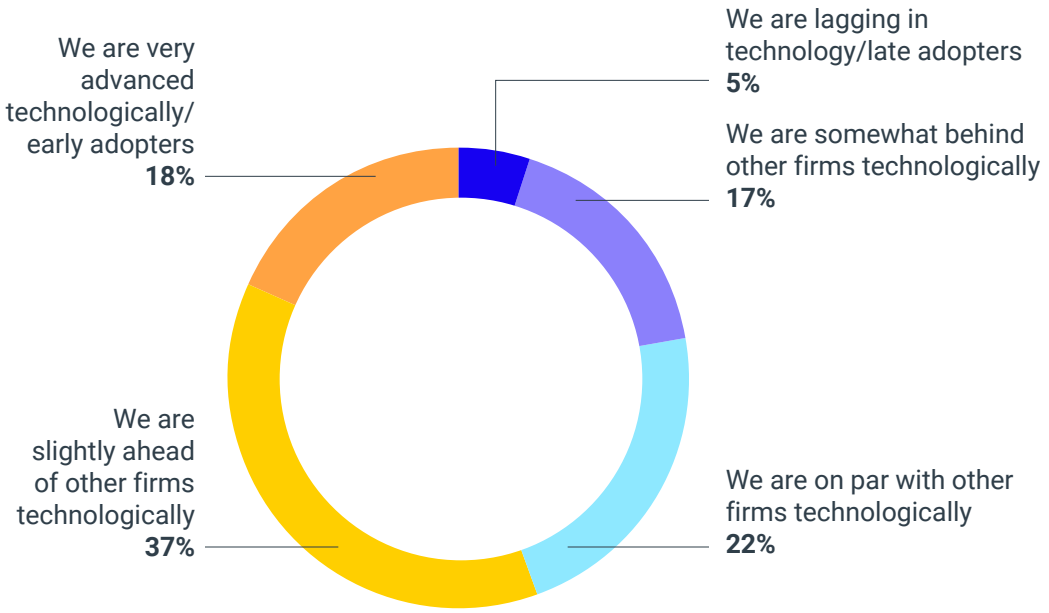
		Knowledge maturity level				
	Overall	Seeker (A)	Practitioner (B)	Established (C)	Expert (D)	Pioneer (E)
We are currently making significant investments	 28%	9%	26%[A]	29%[A]	36%[ABC]	49%[ABCD]
We are currently making moderate investments	 51%	43%	53%[ADE]	52%[AE]	47%	40%
We are currently making small investments	 16%	34%[BCDE]	17%[E]	14%[E]	13%	9%
We plan to invest in the next 12 months	4%	11%[BCDE]	4%	4%	2%	2%
We plan to invest, but not for at least a year	1%	1%	0%	1%	1%	0%

How would you characterize your company's investment in digital transformation, tools, AI (artificial intelligence) and automation?

Blue letters indicate significantly higher at 95% confidence level

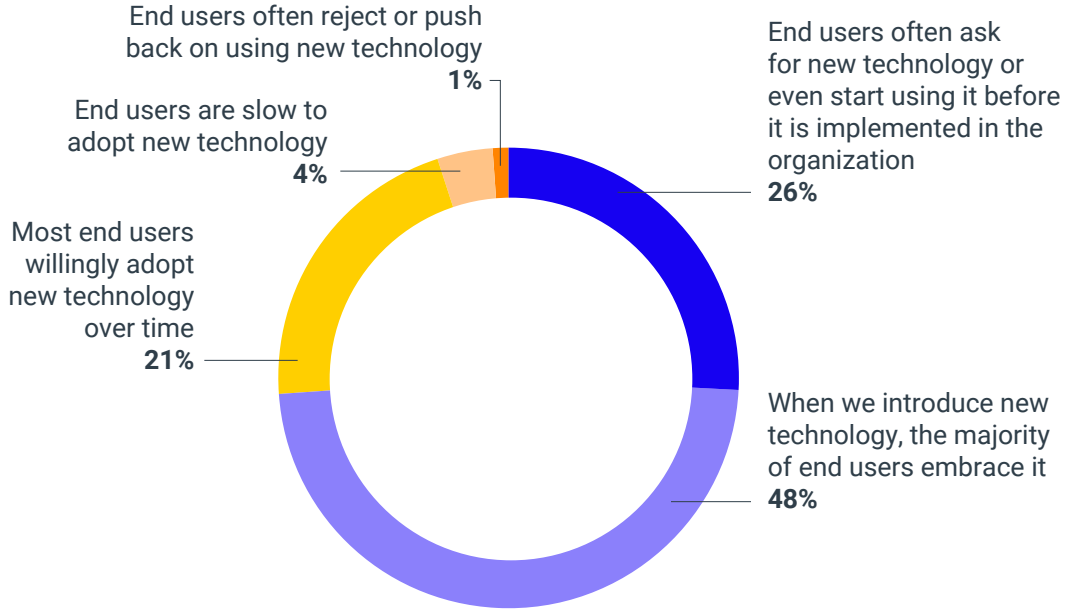
Figure 61 Tech culture

A. Company



Thinking about your firm and its adoption of technology, which of the following statements best describes your firm?

B. End users



How would you describe the adoption of new technology by end users in your organization?

Figure 64 Tech culture: Company

		Knowledge maturity level				
	Overall	Seeker (A)	Practitioner (B)	Established (C)	Expert (D)	Pioneer (E)
We are lagging in technology/late adopters	5%	3%	4%	6%[B]	8%[AB]	9%[AB]
We are somewhat behind other firms technologically	 17%	26%[BCDE]	19%[C]	14%	15%	15%
We are on par with other firms technologically	 22%	45%[BCDE]	22%[DE]	20%	16%	15%
We are slightly ahead of other firms technologically	 37%	20%	40%[A]	38%[A]	37%[A]	34%[A]
We are very advanced technologically/early adopters	 18%	5%	15%[A]	22%[AB]	24%[AB]	27%[AB]

Thinking about your firm and its adoption of technology, which of the following statements best describes your firm?

Blue letters indicate significantly higher at 95% confidence level

Figure 68 Tech culture: End users

		Knowledge maturity level				
	Overall	Seeker (A)	Practitioner (B)	Established (C)	Expert (D)	Pioneer (E)
End users often ask for new technology or even start using it before it is implemented in the organization	 **26%**	12%	25%[A]	30%[AB]	28%[A]	36%[AB]
When we introduce new technology, the majority of end users embrace it	 **48%**	46%	51%[C]	46%	46%	43%
Most end users willingly adopt new technology over time	 **21%**	40%[BCDE]	21%[C]	18%	18%	17%
End users are slow to adopt new technology	**4%**	2%	3%	4%[A]	7%[AB]	5%
End users often reject or push back on using new technology	**1%**	0%	0%	1%[B]	1%	0%

How would you describe the adoption of new technology by end users in your organization?

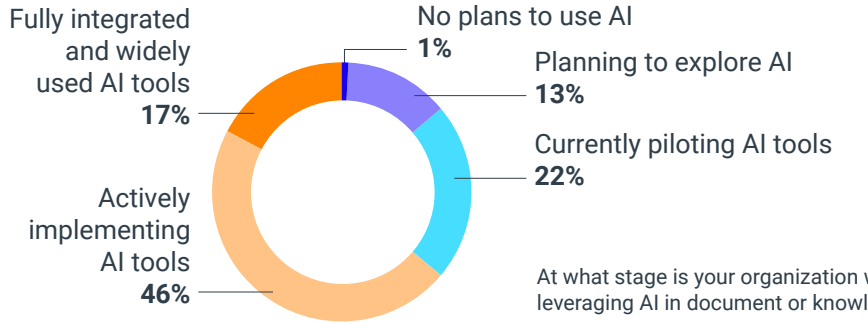
Blue letters indicate significantly higher at 95% confidence level

Figure 70 AI usage

A. Current AI usage

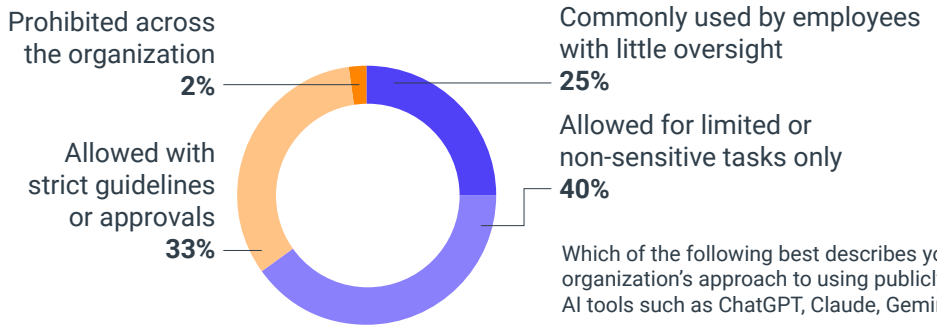
In what ways is your organization currently using AI in its document or knowledge management practices?

B. AI adoption



At what stage is your organization when it comes to leveraging AI in document or knowledge management?

C. Use of publicly available AI



Which of the following best describes your organization's approach to using publicly available AI tools such as ChatGPT, Claude, Gemini, etc.?

Figure 73 Current AI usage

	Overall	Knowledge maturity level				
		Seeker (A)	Practitioner (B)	Established (C)	Expert (D)	Pioneer (E)
Using natural language to query for documents or for information within content in document repositories	**55%**	42%	50%[A]	60%[AB]	62%[AB]	58%[A]
Recommending clauses or templates based on previous work	**42%**	34%	39%	45%[AB]	49%[AB]	48%[AB]
Identifying risks, errors, or anomalies in documents	**40%**	34%	36%	42%[AB]	50%[ABC]	55%[ABC]
Automating document workflows or routing	**39%**	30%	37%	40%[A]	46%[AB]	48%[AB]
Extracting key data points from documents	**38%**	33%	36%	39%	44%[AB]	42%
Summarizing large documents or files	**35%**	26%	32%[A]	38%[AB]	39%[AB]	42%[AB]
Document classification or tagging	**34%**	28%	32%	37%[AB]	36%[A]	39%[A]
Predicting legal or business outcomes	**32%**	24%	29%	35%[AB]	36%[AB]	39%[AB]
Integrating into client-facing tools	**32%**	24%	31%	31%[A]	34%[A]	46%[ABCD]
Drafting or generating content	**30%**	30%	30%	30%	33%	35%

In what ways is your organization currently using AI in its document or knowledge management practices?

Blue letters indicate significantly higher at 95% confidence level

Figure 77 AI usage

		Knowledge maturity level				
	Overall	Seeker (A)	Practitioner (B)	Established (C)	Expert (D)	Pioneer (E)
AI adoption						
No plans to use AI	**1%**	2%	1%	1%	2%	1%
Planning to explore AI	**13%**	25%BCDE	15%CD	9%	11%	11%
Currently piloting AI tools	**22%**	44%BCDE	23%DE	20%D	15%	17%
Actively implementing AI tools	**46%**	26%	50%AC	45%A	51%AC	44%A
Fully integrated and widely used AI tools	**17%**	3%	12%A	25%AB	21%AB	27%AB
Use of publicly available AI						
Commonly used by employees with little oversight	**25%**	14%	23%A	26%A	29%AB	30%A
Allowed for limited or non-sensitive tasks only	**40%**	58%BCDE	42%CDE	36%	35%	32%
Allowed with strict guidelines or approvals	**33%**	27%	33%	34%A	35%	35%
Prohibited across the organization	**2%**	1%	2%	3%A	2%	3%

At what stage is your organization when it comes to leveraging AI in document or knowledge management?

Which of the following best describes your organization's approach to using publicly available AI tools such as ChatGPT, Claude, Gemini, etc.?

Blue letters indicate significantly higher at 95% confidence level

Figure 79 End users and AI

A. End user interest in AI

What are the primary reasons end users in your organization are interested in using AI for document or knowledge management?

B. End user challenges

What are the biggest challenges or concerns end users have related to using AI for document or knowledge management?

Figure 80 End user interest in AI

		Region						
	Overall	North America (A)	UK (B)	Western Europe (C)	Southern Europe (D)	Nordics (E)	LatAm (F)	APAC (G)
To improve productivity or efficiency	**42%**	48%[CEF]	41%	41%	43%[F]	39%	36%	46%[EF]
To improve accuracy	**39%**	47%[BDEFG]	39%	41%[F]	36%	35%	35%	41%[F]
To enhance knowledge re-use	**37%**	40%[F]	35%	35%	37%	36%	33%	39%[F]
To gain competitive advantage	**37%**	38%	33%	36%	36%	33%	35%	41%[BEF]
To support decision-making	**36%**	41%[CEF]	35%	34%	38%	34%	33%	38%
To meet customer expectations	**36%**	36%	42%[EF]	36%	38%[E]	31%	33%	35%
To accelerate service delivery	**36%**	41%[BEF]	34%	35%[E]	34%	28%	34%	40%[BDEF]
To reduce manual effort	**35%**	39%[BDEF]	32%	34%	31%	32%	33%	40%[BCDEF]
To retain or attract top talent	**33%**	34%	29%	34%	30%	35%	30%	37%[BDF]
To reduce risk	**32%**	36%[DEF]	32%	32%	30%	29%	29%	36%[DEF]
To save costs	**32%**	36%[CE]	36%[CE]	29%	35%[CE]	27%	32%	31%

What are the primary reasons end users in your organization are interested in using AI for document or knowledge management?

Blue letters indicate significantly higher at 95% confidence level

Figure 82 End user interest in AI

		Knowledge maturity level				
	Overall	Seeker (A)	Practitioner (B)	Established (C)	Expert (D)	Pioneer (E)
To improve productivity or efficiency	**42%**	37%	40%	44%[A]	48%[AB]	46%
To improve accuracy	**39%**	32%	37%	41%[AB]	45%[AB]	50%[ABC]
To enhance knowledge re-use	**37%**	26%	34%[A]	41%[AB]	39%[A]	39%[A]
To gain competitive advantage	**37%**	24%	34%[A]	39%[AB]	44%[AB]	44%[AB]
To support decision-making	**36%**	32%	34%	37%	43%[ABC]	43%[AB]
To meet customer expectations	**36%**	31%	31%	39%[AB]	46%[ABC]	45%[AB]
To accelerate service delivery	**36%**	30%	32%	38%[AB]	42%[AB]	46%[AB]
To reduce manual effort	**35%**	31%	32%	36%[B]	44%[ABC]	36%
To retain or attract top talent	**33%**	25%	31%	35%[AB]	39%[AB]	37%[A]
To reduce risk	**32%**	25%	32%[A]	31%	36%[A]	44%[ABC]
To save costs	**32%**	25%	30%	34%[AB]	32%	45%[ABCD]

What are the primary reasons end users in your organization are interested in using AI for document or knowledge management?

Blue letters indicate significantly higher at 95% confidence level

Figure 84 End user challenges

		Region						
	Overall	North America (A)	UK (B)	Western Europe (C)	Southern Europe (D)	Nordics (E)	LatAm (F)	APAC (G)
Data security or privacy	36%	41%[CE]	34%	32%	39%[CE]	31%	37%	40%[CE]
Integration with existing systems	32%	36%[B]	29%	31%	34%	31%	30%	34%
Unclear ROI or business value	32%	29%	31%	29%	38%[ABCE]	29%	34%	34%
Regulatory or legal uncertainty	31%	34%[F]	30%	34%[F]	29%	30%	25%	33%[F]
Lack of clarity on use cases	30%	29%	32%	34%[E]	28%	28%	29%	32%
Cost of implementation	30%	31%	30%	28%	30%	30%	29%	33%[C]
Lack of trust	29%	31%	31%	27%	26%	30%	26%	30%
Lack of expertise	29%	28%	27%	30%[D]	24%	31%[D]	28%	30%[D]
Resistance to change	27%	24%	25%	29%	24%	30%	25%	29%
Poor data quality	27%	25%	29%	24%	27%	30%[C]	28%	25%
Ethical concerns	25%	21%	25%	21%	23%	26%	27%	31%[ACD]
None – end users do not have any concerns	4%	5%[G]	5%	5%[G]	3%	3%	4%	2%

What are the biggest challenges or concerns end users have related to using AI for document or knowledge management?

Blue letters indicate significantly higher at 95% confidence level

Figure 86 End user challenges

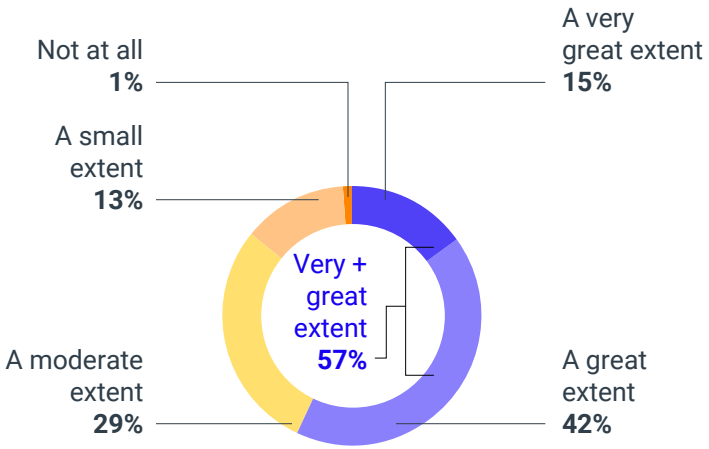
		Knowledge maturity level				
	Overall	Seeker (A)	Practitioner (B)	Established (C)	Expert (D)	Pioneer (E)
Data security or privacy	**36%**	37%	34%	39%[B]	40%	32%
Integration with existing systems	**32%**	31%	32%	33%	32%	33%
Unclear ROI or business value	**32%**	25%	32%[A]	32%[A]	37%[A]	28%
Regulatory or legal uncertainty	**31%**	28%	29%	34%[B]	32%	30%
Lack of clarity on use cases	**30%**	26%	29%	32%	34%[AB]	28%
Cost of implementation	**30%**	26%	29%	31%	34%	35%
Lack of trust	**29%**	27%	28%	29%	32%	34%
Lack of expertise	**29%**	21%	28%[A]	30%[A]	31%[A]	26%
Resistance to change	**27%**	24%	27%	28%	28%	24%
Poor data quality	**27%**	22%	26%	27%	30%[A]	25%
Ethical concerns	**25%**	29%	22%	28%[B]	25%	23%
None – end users do not have any concerns	**4%**	1%	2%	4%[AB]	7%[AB]	9%[ABC]

What are the biggest challenges or concerns end users have related to using AI for document or knowledge management?

Blue letters indicate significantly higher at 95% confidence level

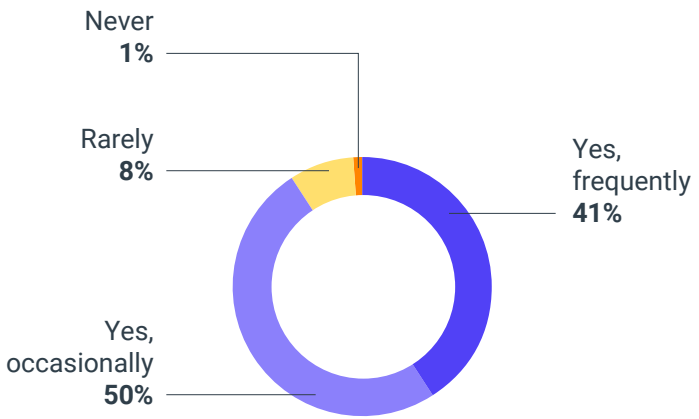
Figure 88 Customer impact

A. Customer influence on AI usage



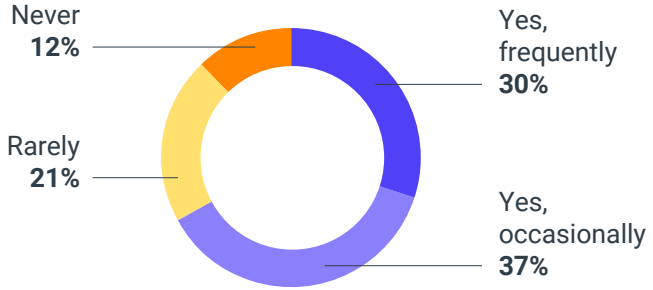
To what extent do customer needs or expectations influence your organization's use of AI?

B. Customer demand driving AI adoption



Has customer demand ever prompted your organization to adopt or expand AI-powered document or knowledge management tools?

C. Customer demand restricting AI usage



Has customer demand ever prompted your organization to avoid or restrict AI-powered document or knowledge management tools?

Figure 91 Customer influence on AI usage

		Knowledge maturity level				
	Overall	Seeker (A)	Practitioner (B)	Established (C)	Expert (D)	Pioneer (E)
Very great/great extent	**57%**	**20%**	**54%[A]**	**63%[AB]**	**67%[AB]**	**74%[ABC]**
A very great extent	**15%**	4%	10%[A]	18%[AB]	24%[ABC]	36%[ABCD]
A great extent	**42%**	16%	43%[A]	45%[A]	42%[A]	37%[A]
A moderate extent	**29%**	58%[BCDE]	30%[CDE]	25%	22%	19%
A small extent	**13%**	18%[CDE]	15%[CDE]	11%	11%	7%
Not at all	**1%**	4%[BCDE]	1%	1%	1%	1%

To what extent do customer needs or expectations influence your organization's use of AI?

Blue letters indicate significantly higher at 95% confidence level

Figure 93 Customer impact

		Vertical		
	Overall	Legal (A)	Accounting & Tax (B)	Financial Services & Asset Management (C)
Customer demand driving AI Adoption				
Yes, frequently	**41%**	44%[BC]	36%	39%
Yes, occasionally	**50%**	48%	52%	52%
Rarely	**8%**	7%	11%[A]	9%
Never	**1%**	1%	1%	1%
Customer demand restricting AI usage				
Yes, frequently	**30%**	34%[BC]	25%	29%
Yes, occasionally	**37%**	38%	37%	35%
Rarely	**21%**	18%	25%[A]	24%[A]
Never	**12%**	11%	13%	12%

Has customer demand ever prompted your organization to adopt or expand AI-powered document or knowledge management tools?

Has customer demand ever prompted your organization to avoid or restrict AI-powered document or knowledge management tools?

Blue letters indicate significantly higher at 95% confidence level

Figure 94 Customer impact

		Knowledge maturity level				
	Overall	Seeker (A)	Practitioner (B)	Established (C)	Expert (D)	Pioneer (E)
Customer demand driving AI Adoption						
Yes, frequently	**41%**	20%	37%[A]	46%[AB]	48%[AB]	48%[AB]
Yes, occasionally	**50%**	73%[BCDE]	53%[CDE]	46%[D]	40%	42%
Rarely	**8%**	4%	8%[A]	7%	11%[AC]	9%
Never	**1%**	2%	1%	1%	1%	1%
Customer demand restricting AI usage						
Yes, frequently	**30%**	19%	34%[ACDE]	30%[A]	28%[A]	25%
Yes, occasionally	**37%**	60%[BCDE]	38%[DE]	35%[D]	27%	28%
Rarely	**21%**	16%	21%	22%[A]	24%[A]	21%
Never	**12%**	5%	7%	13%[AB]	21%[ABC]	26%[ABC]

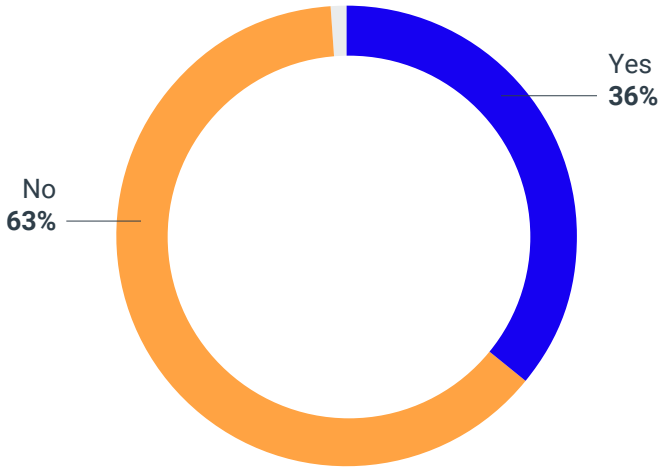
Has customer demand ever prompted your organization to adopt or expand AI-powered document or knowledge management tools?

Has customer demand ever prompted your organization to avoid or restrict AI-powered document or knowledge management tools?

Blue letters indicate significantly higher at 95% confidence level

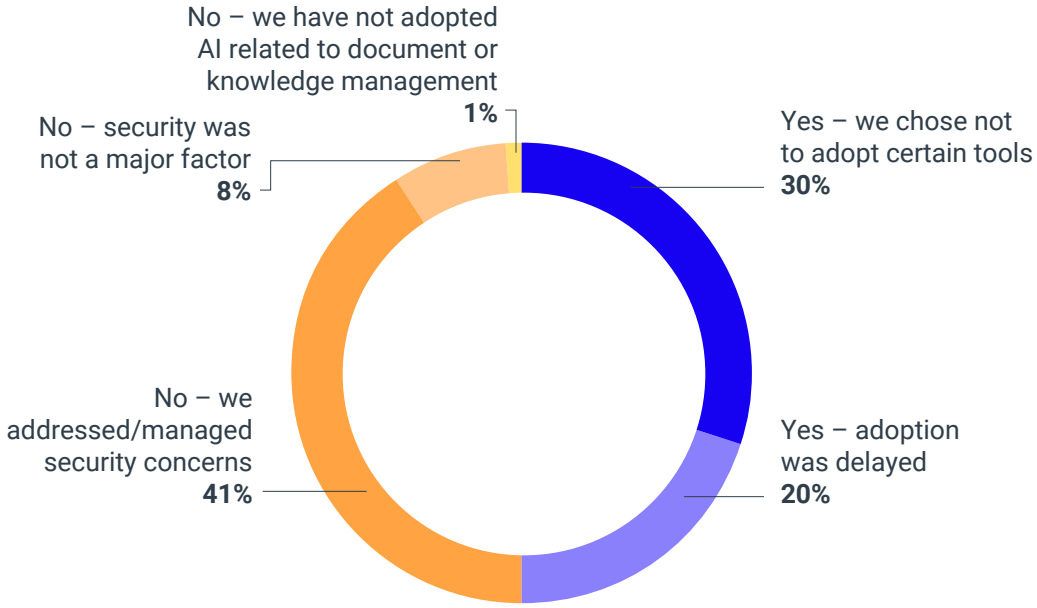
Figure 95 AI security

A. Policy violation experience



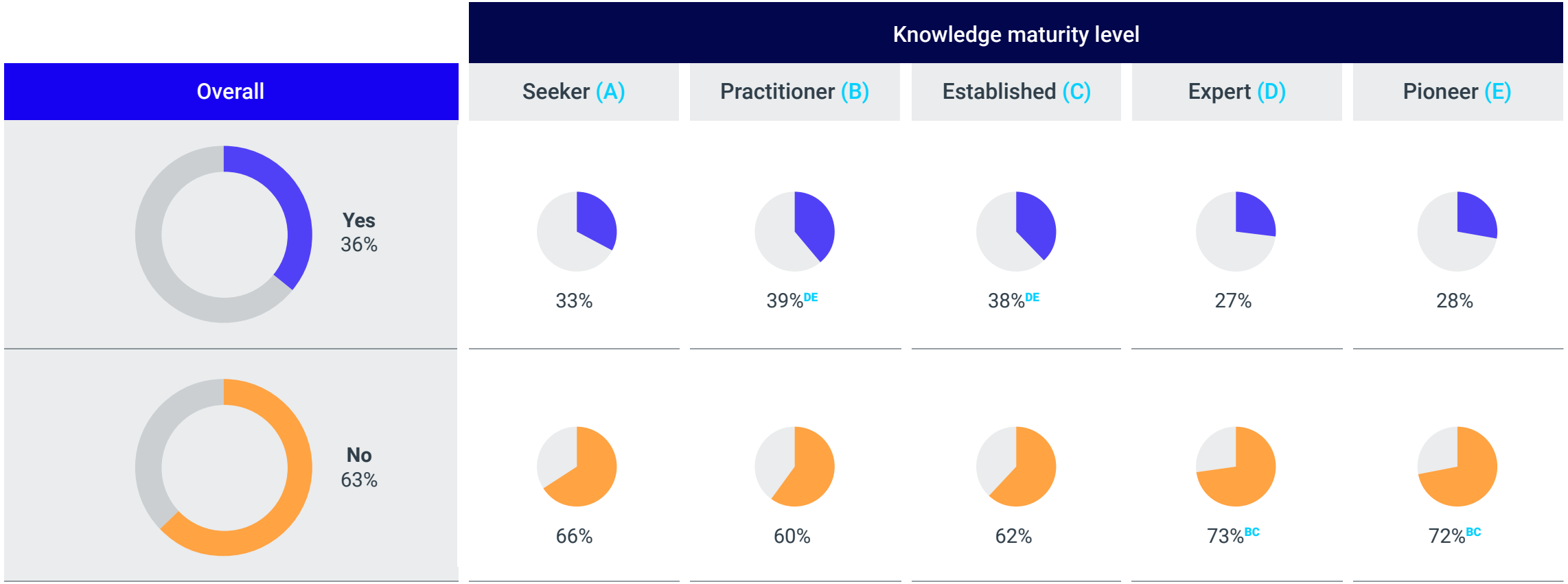
Has your organization experienced a documented policy violation or incident with measurable impact (such as data leakage, security breach, or regulatory non-compliance) caused by the use of unregulated or publicly available AI tools?

B. Security concern impact on AI adoption



Have security concerns delayed or blocked your organization's adoption of AI related to document or knowledge management?

Figure 98 Policy violation experience



Has your organization experienced a documented policy violation or incident with measurable impact (such as data leakage, security breach, or regulatory non-compliance) caused by the use of unregulated or publicly available AI tools?

Blue letters indicate significantly higher at 95% confidence level

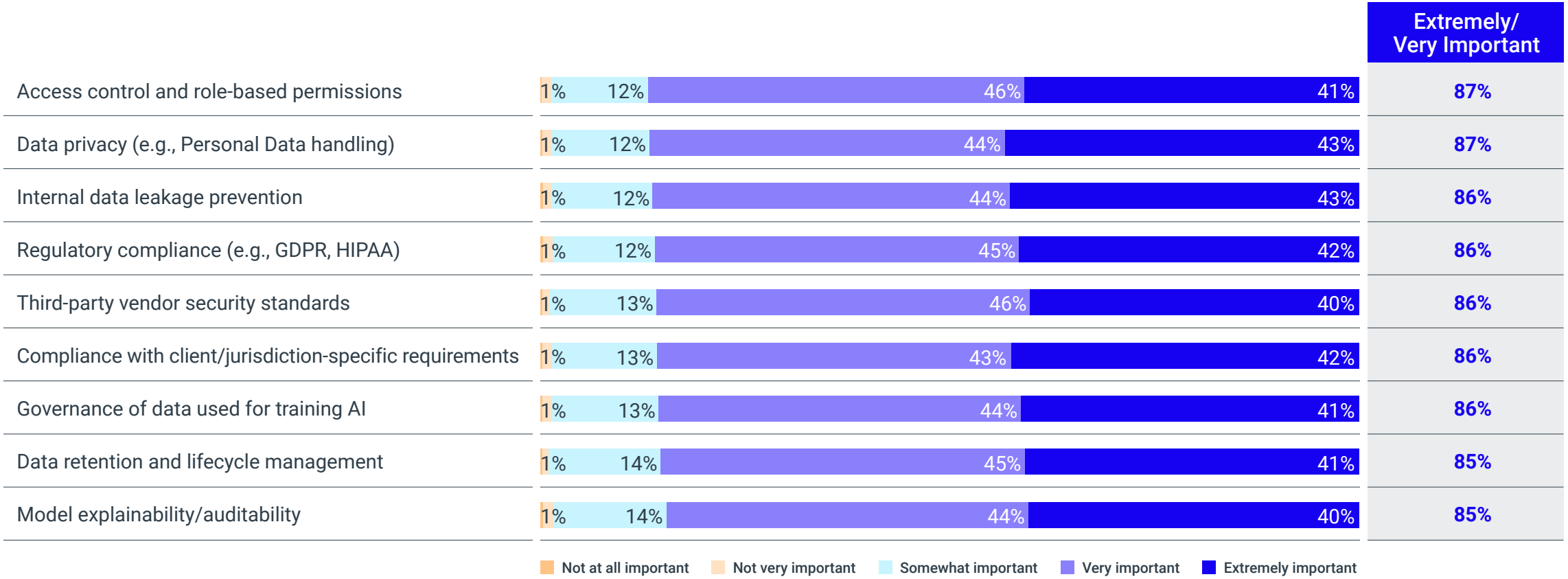
Figure 102 Security concern impact on AI adoption

	Overall	Knowledge maturity level				
		Seeker (A)	Practitioner (B)	Established (C)	Expert (D)	Pioneer (E)
Yes – we chose not to adopt certain tools	 **30%**	32%	32%[E]	30%	28%	24%
Yes – adoption was delayed	 **20%**	16%	17%	23%[AB]	21%	27%[AB]
No – we addressed/managed security concerns	 **41%**	44%[E]	43%[CE]	39%	39%	32%
No – security was not a major factor	 **8%**	5%	8%	8%	11%[A]	16[ABC]%
No – we have not adopted AI related to document or knowledge management	**1%**	3%[B]	1%	1%	1%	1%

Have security concerns delayed or blocked your organization's adoption of AI related to document or knowledge management?

Blue letters indicate significantly higher at 95% confidence level

Figure 104 Importance of AI security considerations



How important are the following security-related considerations when adopting AI for document or knowledge management in your organization?

Figure 107 Importance of AI security considerations

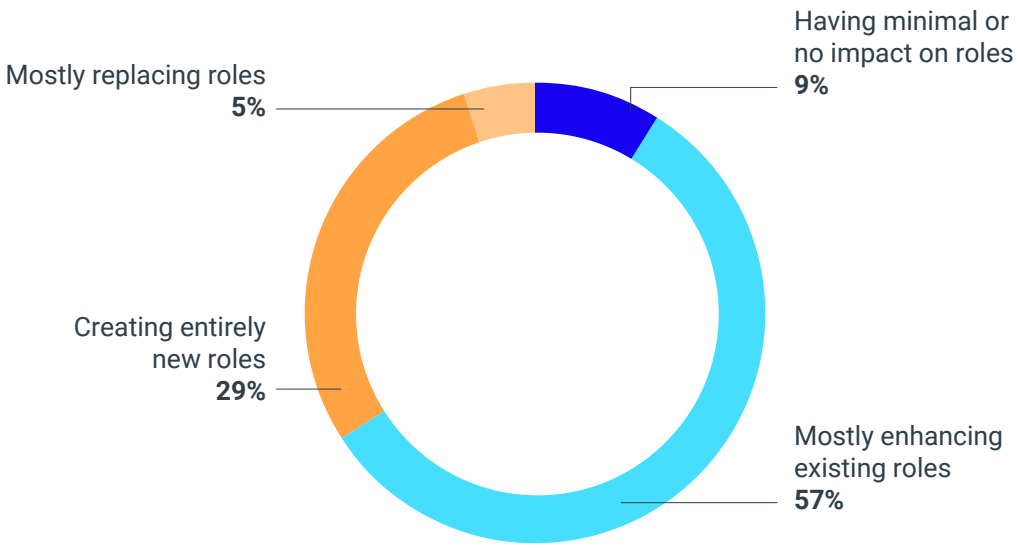
		Knowledge maturity level				
	Extremely/ Very important	Seeker (A)	Practitioner (B)	Established (C)	Expert (D)	Pioneer (E)
Access control and role-based permissions	**87%**	72%	83%[A]	92%[AB]	93%[AB]	94%[AB]
Data privacy (e.g., Personal Data handling)	**87%**	71%	83%[A]	92%[AB]	92%[AB]	94%[AB]
Internal data leakage prevention	**86%**	66%	84%[A]	91%[AB]	93%[AB]	93%[AB]
Regulatory compliance (e.g., GDPR, HIPAA)	**86%**	72%	82%[A]	90%[AB]	93%[AB]	95%[ABC]
Third-party vendor security standards	**86%**	70%	82%[A]	91%[AB]	92%[AB]	89%[AB]
Compliance with client/jurisdiction-specific requirements	**86%**	70%	82%[A]	91%[AB]	92%[AB]	93%[AB]
Governance of data used for training AI	**86%**	65%	82%[A]	91%[AB]	92%[AB]	91%[AB]
Data retention and lifecycle management	**85%**	65%	82%[A]	91%[AB]	94%[ABC]	90%[AB]
Model explainability/auditability	**85%**	61%	81%[A]	91%[AB]	93%[AB]	90%[AB]

How important are the following security-related considerations when adopting AI for document or knowledge management in your organization?

Blue letters indicate significantly higher at 95% confidence level

Figure 108 AI impact on roles

A. Overall impact of AI on job roles



How is AI shaping or changing roles in the organization?

B. Ways AI is shaping roles

59%
Automating administrative tasks

58%
Enhancing productivity by generating first drafts of documents, suggesting edits and flagging contract risks

53%
Improving productivity related to analyzing, summarizing, extracting and synthesizing documents

45%
Reducing time needed for new team members to be onboarded and come up to speed

37%
Creating client-facing self-service tools, dashboards and analytics

34%
Requiring collaboration between new and existing roles

30%
Creating new professional services roles

28%
New ethical and governance responsibilities

Overall, would you say AI is...

Figure 111 Overall impact of AI on job roles

	Overall	Knowledge maturity level				
		Seeker (A)	Practitioner (B)	Established (C)	Expert (D)	Pioneer (E)
Having minimal or no impact on roles	 9%	8%	9%	9%	9%	11%
Mostly enhancing existing roles	 57%	70%[BCDE]	56%	58%	56%	50%
Creating entirely new roles	 29%	20%	30%[A]	28%[A]	31%[A]	31%[A]
Mostly replacing roles	5%	2%	5%[A]	5%[A]	5%	7%[A]

Overall, would you say AI is...

Blue letters indicate significantly higher at 95% confidence level

Figure 115 Ways AI is shaping roles

		Knowledge maturity level				
	Overall	Seeker (A)	Practitioner (B)	Established (C)	Expert (D)	Pioneer (E)
Automating administrative tasks	**59%**	53%	55%	62%[AB]	67%[AB]	66%[AB]
Enhancing productivity by generating first drafts of documents, suggesting edits and flagging contract risks	**58%**	47%	54%	61%[AB]	64%[AB]	72%[ABC]
Improving productivity related to analyzing, summarizing, extracting and synthesizing documents	**53%**	45%	50%	57%[AB]	56%[AB]	62%[AB]
Reducing time needed for new team members to be onboarded and come up to speed	**45%**	40%	43%	46%	50%[AB]	43%
Creating client-facing self-service tools, dashboards and analytics	**37%**	36%	33%	40%[B]	44%[AB]	36%
Requiring collaboration between new and existing roles	**34%**	24%	30%	36%[AB]	42%[AB]	41%[AB]
Creating new professional services roles	**30%**	18%	31%[A]	30%[A]	31%[A]	38%[A]
New ethical and governance responsibilities	**28%**	21%	27%[A]	27%	35%[ABC]	34%[A]

How is AI shaping or changing roles in the organization?

Blue letters indicate significantly higher at 95% confidence level

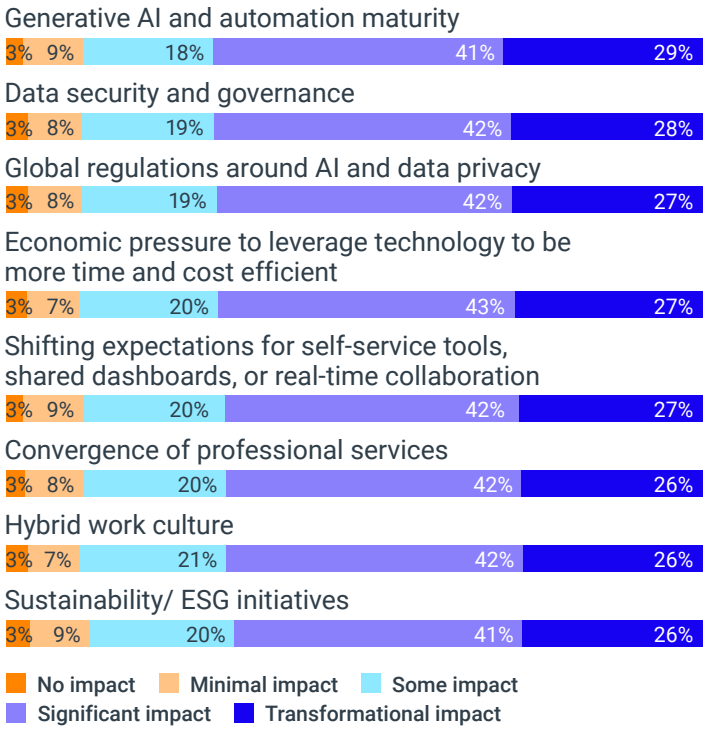
Figure 118 3-year trends

A. Investment areas

- **51%** AI-powered knowledge management
- **49%** Autonomous document workflows
- **46%** Predictive analytics to predict outcomes, benchmark performance and guide strategy
- **36%** AI-enabled document classification
- **31%** Client-facing AI assistant for self service
- **30%** Client real-time collaboration tools
- **30%** AI-enabled email filing
- **30%** AI-enabled search
- **30%** Cloud-based applications
- **27%** API ecosystems for AI
- **23%** Natural language/semantic search

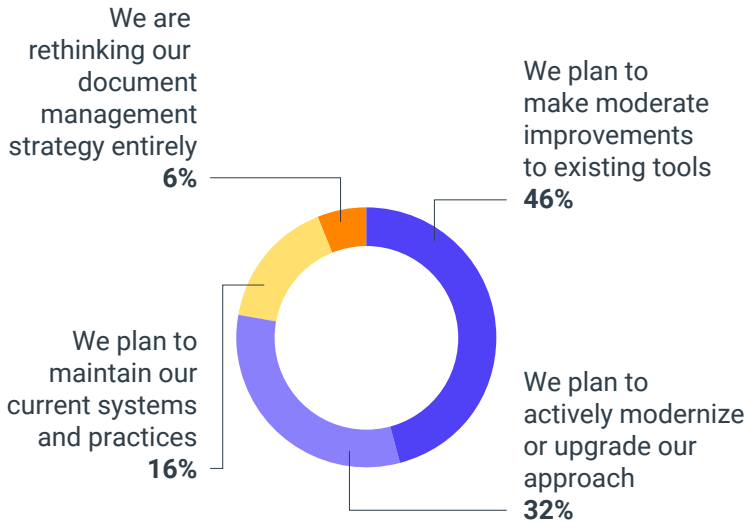
Over the next 3 years, which of the following do you expect your organization to invest in, if any?

B. Impact



Over the next 3 years, how much impact do you expect each of the following to have on your organization?

C. Document management approach



Which of the following statements best describes your organization's overall approach to document management over the next 3 years?

Figure 121 Investment areas

		Knowledge maturity level				
	Overall	Seeker (A)	Practitioner (B)	Established (C)	Expert (D)	Pioneer (E)
AI-powered knowledge management	**51%**	43%	47%	53%[AB]	60%[ABC]	62%[ABC]
Autonomous document workflows	**49%**	42%	45%	52%[AB]	55%[AB]	62%[ABC]
Predictive analytics to predict outcomes, benchmark performance and guide strategy	**46%**	34%	43%[A]	51%[AB]	51%[AB]	51%[A]
AI-enabled document classification	**36%**	27%	35%[A]	37%[A]	41%[AB]	43%[A]
Client-facing AI assistant for self service	**31%**	24%	30%[A]	32%[A]	34%[A]	37%[A]
Client real-time collaboration tools	**30%**	27%	29%	32%	31%	38%[AB]
AI-enabled email filing	**30%**	24%	27%	32%[AB]	36%[AB]	38%[AB]
AI-enabled search	**30%**	32%	27%	31%[B]	34%[B]	38%[B]
Cloud-based applications	**30%**	23%	27%	31%[AB]	37%[ABC]	44%[ABC]
API ecosystems for AI	**27%**	20%	23%	29%[AB]	34%[AB]	31%[A]
Natural language/semantic search	**23%**	20%	21%	24%	29%[ABC]	24%

Over the next 3 years, which of the following do you expect your organization to invest in, if any?

Blue letters indicate significantly higher at 95% confidence level

Figure 125 Impact

		Knowledge maturity level				
	Transformational/ Significant impact	Seeker (A)	Practitioner (B)	Established (C)	Expert (D)	Pioneer (E)
Generative AI and automation maturity	**70%**	44%	67%[A]	76%[AB]	76%[AB]	81%[AB]
Data security and governance	**70%**	49%	66%[A]	78%[ABD]	72%[AB]	74%[AB]
Global regulations around AI and data privacy	**70%**	44%	67%[A]	77%[AB]	72%[AB]	77%[AB]
Economic pressure to leverage technology to be more time and cost efficient	**70%**	44%	67%[A]	77%[ABD]	71%[A]	79%[AB]
Shifting expectations for self-service tools, shared dashboards, or real-time collaboration	**69%**	45%	65%[A]	76%[AB]	72%[AB]	75%[AB]
Convergence of professional services	**68%**	43%	65%[A]	75%[AB]	72%[AB]	75%[AB]
Hybrid work culture	**68%**	40%	65%[A]	76%[AB]	71%[AB]	76%[AB]
Sustainability/ESG initiatives	**67%**	40%	64%[A]	74%[AB]	71%[AB]	76%[AB]

Over the next 3 years, how much impact do you expect each of the following to have on your organization?

Blue letters indicate significantly higher at 95% confidence level

Figure 128 Document management approach

	Overall	Knowledge maturity level				
		Seeker (A)	Practitioner (B)	Established (C)	Expert (D)	Pioneer (E)
We are rethinking our document management strategy entirely	 6%	3%	5%	7%[AB]	7%[A]	6%
We plan to actively modernize or upgrade our approach	 32%	30%	32%	31%	32%	34%
We plan to make moderate improvements to existing tools	 46%	59%[BCDE]	48%[CDE]	43%	40%	35%
We plan to maintain our current systems and practices	 16%	7%	14%[A]	19%[AB]	21%[AB]	25%[AB]

Which of the following statements best describes your organization's overall approach to document management over the next 3 years?

Blue letters indicate significantly higher at 95% confidence level

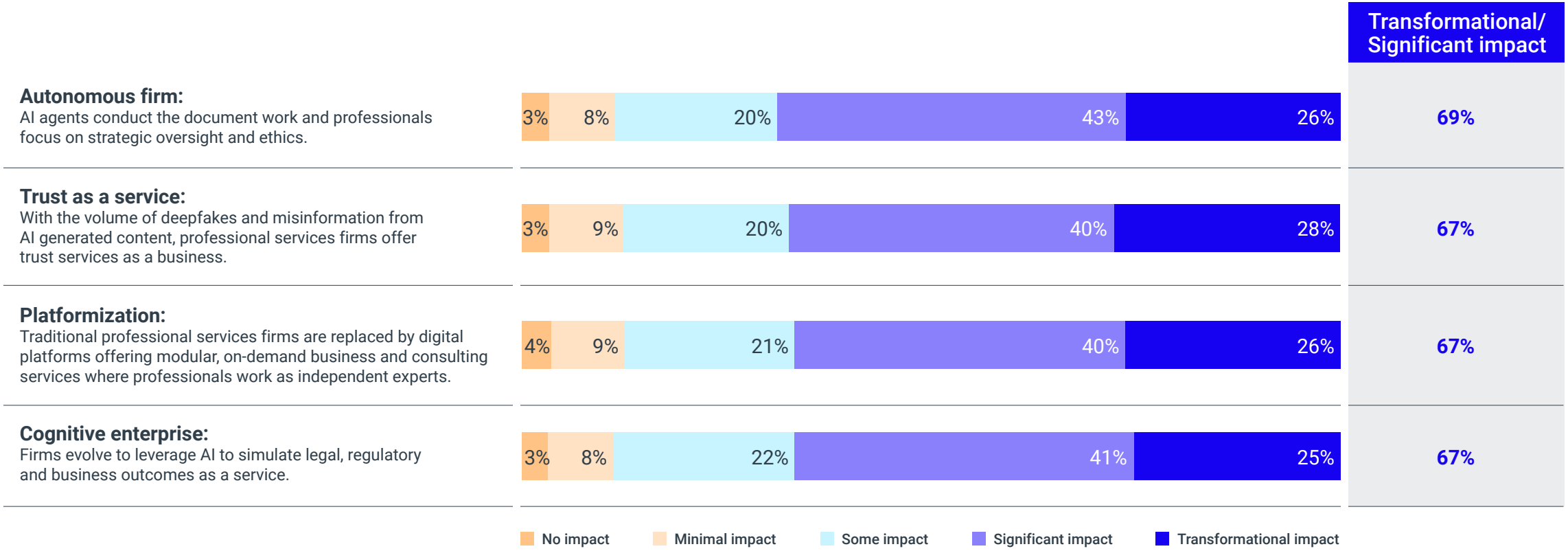
Figure 133 Likelihood of scenario

	Highly likely	Knowledge maturity level				
		Seeker (A)	Practitioner (B)	Established (C)	Expert (D)	Pioneer (E)
Autonomous firm: AI agents conduct the document work and professionals focus on strategic oversight and ethics.	 53%	37%	53%[A]	53%[A]	59%[ABC]	68%[ABC]
Trust as a service: With the volume of deepfakes and misinformation from AI generated content, professional services firms offer trust services as a business.	 53%	39%	49%[A]	56%[AB]	61%[AB]	68%[ABC]
Cognitive enterprise: Firms evolve to leverage AI to simulate legal, regulatory and business outcomes as a service.	 53%	40%	51%[A]	56%[AB]	53%[A]	68%[ABCD]
Platformization: Traditional professional services firms are replaced by digital platforms offering modular, on-demand business and consulting services where professionals work as independent experts.	 53%	37%	51%[A]	56%[AB]	57%[AB]	64%[AB]

How likely do you think each of the following scenarios are in the next 10 years?

Blue letters indicate significantly higher at 95% confidence level

Figure 134 Impact of scenario



Over the next 10 years, how much impact do you think each scenario would have on your business if it were to occur?

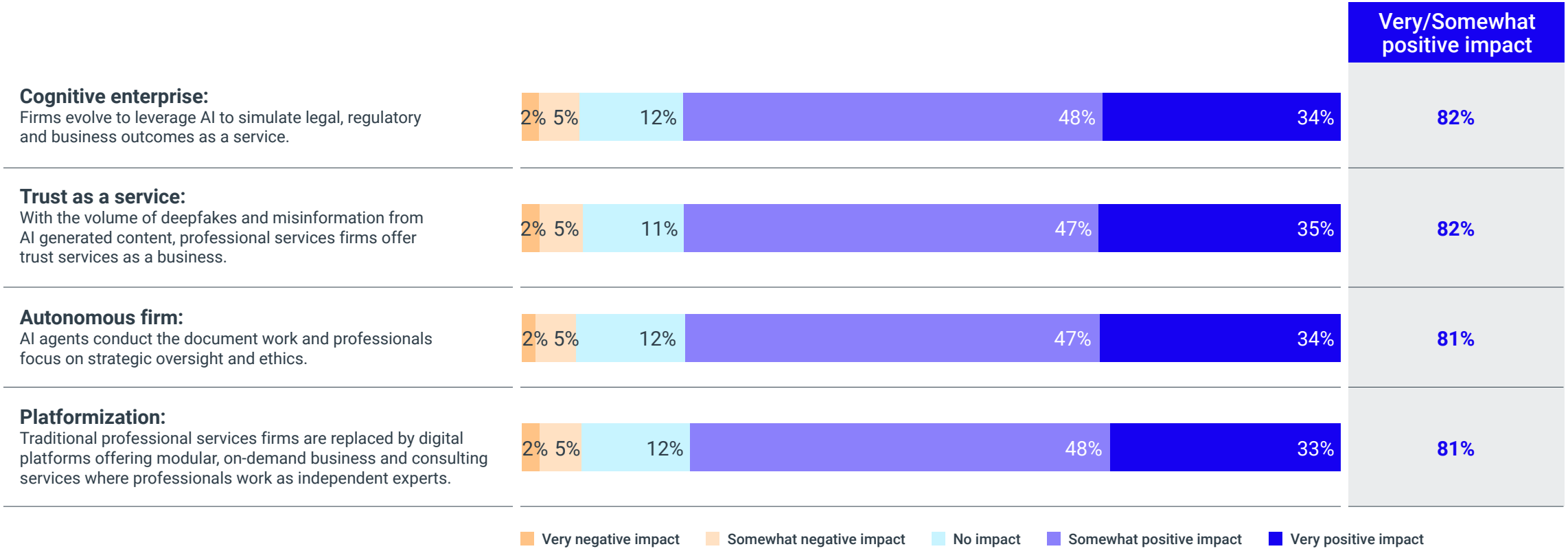
Figure 137 Impact of scenario

	Transformational/ Significant impact	Knowledge maturity level				
		Seeker (A)	Practitioner (B)	Established (C)	Expert (D)	Pioneer (E)
Autonomous firm: AI agents conduct the document work and professionals focus on strategic oversight and ethics.	 69%	46%	67%[A]	74%[AB]	71%[A]	73%[A]
Trust as a service: With the volume of deepfakes and misinformation from AI generated content, professional services firms offer trust services as a business.	 67%	43%	63%[A]	75%[AB]	71%[AB]	77%[AB]
Platformization: Traditional professional services firms are replaced by digital platforms offering modular, on-demand business and consulting services where professionals work as independent experts.	 67%	43%	64%[A]	75%[ABD]	68%[A]	70%[A]
Cognitive enterprise: Firms evolve to leverage AI to simulate legal, regulatory and business outcomes as a service.	 67%	39%	63%[A]	75%[AB]	72%[AB]	74%[AB]

Over the next 10 years, how much impact do you think each scenario would have on your business if it were to occur?

Blue letters indicate significantly higher at 95% confidence level

Figure 138 Positive or negative impact



Will the impact this scenario has on your business (if it occurs) in the next 10 years be positive or negative?

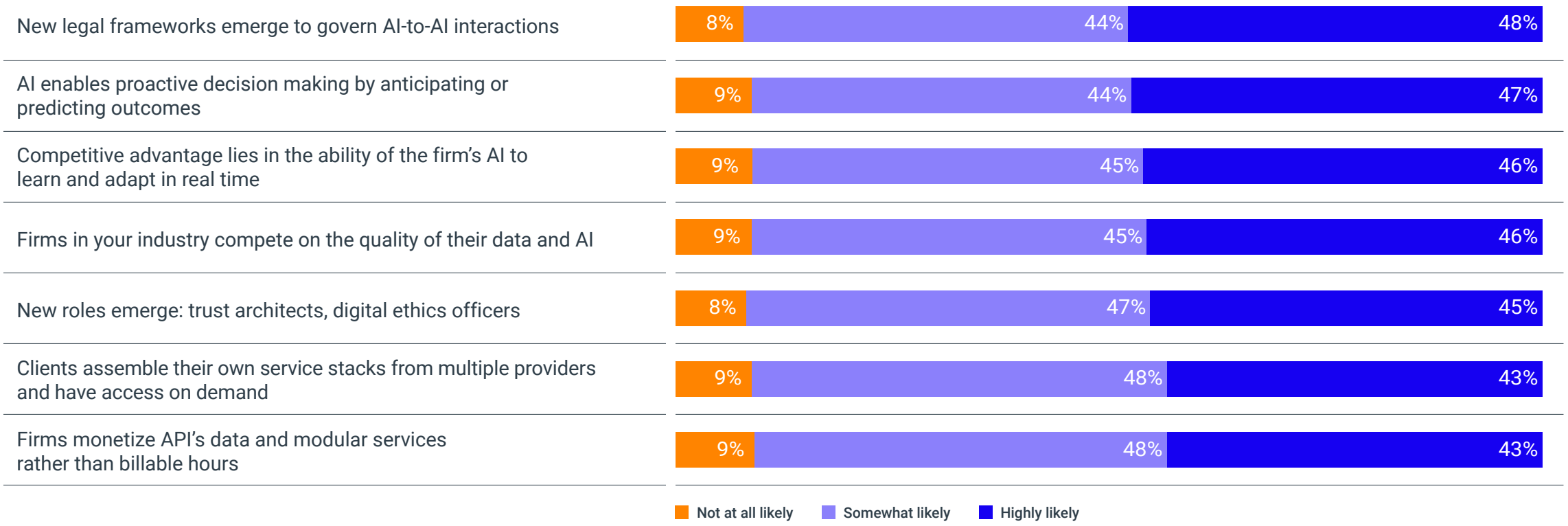
Figure 141 Positive or negative impact

	Very/Somewhat positive impact	Knowledge maturity level				
		Seeker (A)	Practitioner (B)	Established (C)	Expert (D)	Pioneer (E)
Cognitive enterprise: Firms evolve to leverage AI to simulate legal, regulatory and business outcomes as a service.	82%	58%	77%[A]	91%[ABD]	84%[AB]	90%[ABD]
Trust as a service: With the volume of deepfakes and misinformation from AI generated content, professional services firms offer trust services as a business.	82%	65%	76%[A]	90%[ABD]	85%[AB]	88%[AB]
Autonomous firm: AI agents conduct the document work and professionals focus on strategic oversight and ethics.	81%	55%	77%[A]	89%[AB]	88%[AB]	92%[AB]
Platformization: Traditional professional services firms are replaced by digital platforms offering modular, on-demand business and consulting services where professionals work as independent experts.	81%	58%	78%[A]	88%[ABD]	83%[AB]	88%[AB]

Will the impact this scenario has on your business (if it occurs) in the next 10 years be positive or negative?

Blue letters indicate significantly higher at 95% confidence level

Figure 143 Likelihood of 10-year scenarios



Now please consider several additional possible scenarios. How likely do you think each of these are to occur in the next 10 years?

Figure 146 Likelihood of 10-year scenarios

		Knowledge maturity level				
	Highly likely	Seeker (A)	Practitioner (B)	Established (C)	Expert (D)	Pioneer (E)
New legal frameworks emerge to govern AI-to-AI interactions	**48%**	36%	47%[A]	51%[A]	48%[A]	51%[A]
AI enables proactive decision making by anticipating or predicting outcomes	**47%**	37%	45%[A]	49%[A]	53%[AB]	56%[AB]
Competitive advantage lies in the ability of the firm's AI to learn and adapt in real time	**46%**	32%	45%[A]	46%[A]	54%[ABC]	62%[ABC]
Firms in your industry compete on the quality of their data and AI	**46%**	33%	43%[A]	49%[AB]	48%[A]	62%[ABCD]
New roles emerge: trust architects, digital ethics officers	**45%**	42%	43%	46%	51%[AB]	57%[ABC]
Clients assemble their own service stacks from multiple providers and have access on demand	**43%**	31%	43%[A]	46%[A]	45%[A]	48%[A]
Firms monetize API's data and modular services rather than billable hours	**43%**	35%	42%[A]	45%[A]	47%[A]	44%

Now please consider several additional possible scenarios. How likely do you think each of these are to occur in the next 10 years?

Blue letters indicate significantly higher at 95% confidence level

Figure 150 Positive or negative impact

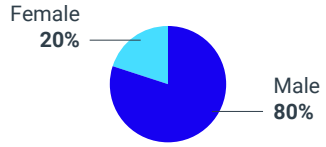
		Knowledge maturity level				
	Very/Somewhat positive	Seeker (A)	Practitioner (B)	Established (C)	Expert (D)	Pioneer (E)
Firms in your industry compete on the quality of their data and AI	**87%**	71%	84%[A]	93%[AB]	93%[AB]	94%[AB]
AI enables proactive decision making by anticipating or predicting outcomes	**87%**	72%	84%[A]	92%[AB]	91%[AB]	93%[AB]
New legal frameworks emerge to govern AI-to-AI interactions	**87%**	66%	85%[A]	91%[AB]	92%[AB]	89%[A]
Firms monetize API's data and modular services rather than billable hours	**86%**	65%	83%[A]	91%[AB]	93%[AB]	90%[AB]
Competitive advantage lies in the ability of the firm's AI to learn and adapt in real time	**86%**	68%	82%[A]	92%[AB]	91%[AB]	88%[AB]
New roles emerge: trust architects, digital ethics officers	**86%**	68%	82%[A]	91%[AB]	92%[AB]	87%[A]
Clients assemble their own service stacks from multiple providers and have access on demand	**85%**	66%	82%[A]	91%[AB]	90%[AB]	93%[AB]

How will each of these scenarios affect your business if they occur in the next 10 years?

Blue letters indicate significantly higher at 95% confidence level

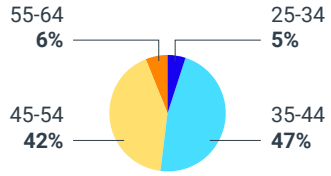
Figure 152 Sample composition

A. Gender



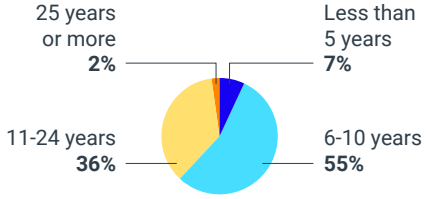
Gender

B. Age



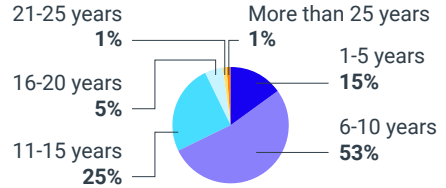
Age

C. Years of professional experience



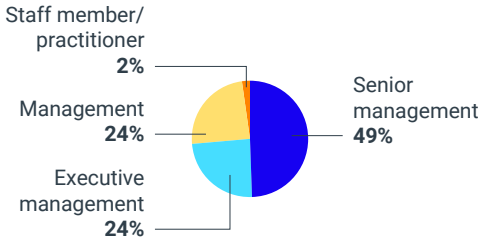
Time at current company

D. Time at current company



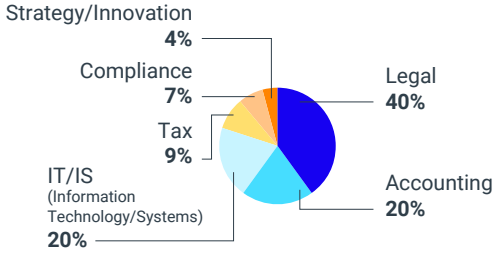
Years of professional experience

E. Job level



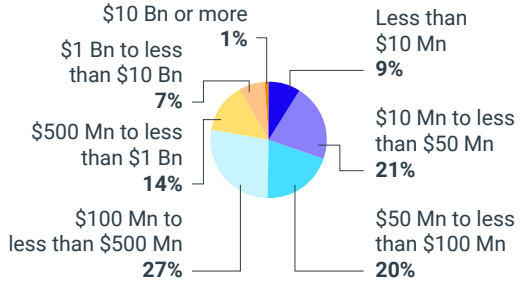
Job Level

F. Department



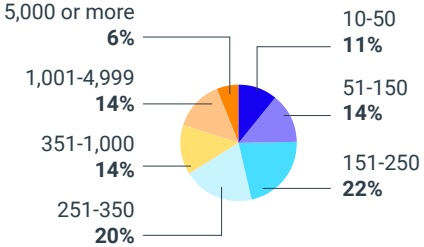
Department

G. Company revenue



Company revenue

H. Employee size



Current employee size

Figure 153 KWMM maturity level by region

		Region						
	Overall	North America (A)	UK (B)	Western Europe (C)	Southern Europe (D)	Nordics (E)	LatAm (F)	APAC (G)
Seeker	6%	8%	6%	8%	7%	5%	6%	6%
Practitioner	 44%	42%	49%CDG	41%	42%	54%ACDFG	48%CG	40%
Established	 33%	30%	32%	33%	37%AE	30%	35%	32%
Expert	 12%	15%EF	10%	13%EF	11%E	7%	8%	16%BDEF
Pioneer	5%	5%	3%	6%B	4%	3%	4%	7%BEF

Blue letters indicate significantly higher at 95% confidence level

Figure 154 KWMM maturity level by vertical

		Vertical		
	Overall	Legal (A)	Accounting & tax (B)	Financial services & asset management (C)
Seeker	6%	7%	6%	6%
Practitioner	 44%	46%[B]	39%	47%[B]
Established	 33%	32%	34%	32%
Expert	 12%	11%	15%[AC]	10%
Pioneer	5%	4%	7%[A]	5%

Blue letters indicate significantly higher at 95% confidence level

Figure 155 KWMM maturity level by vertical

		Vertical				
	Overall	Accounting (A)	Tax (B)	Asset management (C)	Legal (D)	Financial services (E)
Seeker	6%	6%	4%	8%	7%[B]	5%
Practitioner	 44%	38%	44%	42%	46%[A]	49%[A]
Established	 33%	35%	31%	32%	32%	32%
Expert	 12%	15%[DE]	13%	13%	11%	9%
Pioneer	5%	6%[D]	8%[D]	5%	4%	5%

Blue letters indicate significantly higher at 95% confidence level

Figure 163 KWMM maturity level by employee size

		Vertical				
	Overall	Small (10-50) (A)	Medium (51-250) (B)	Large (251-1000) (C)	Enterprise (1001-4999) (D)	Large enterprise (5000+) (E)
Seeker	**6%**	5%[E]	7%[E]	7%[E]	6%[E]	2%
Practitioner	 **44%**	53%[BCDE]	44%	43%	44%	41%
Established	 **33%**	29%	34%	32%	32%	34%
Expert	 **12%**	11%	10%	13%	12%	20%[ABCD]
Pioneer	**5%**	2%	5%[A]	5%[A]	6%[A]	3%

Blue letters indicate significantly higher at 95% confidence level

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