iManage
Making knowledge work

# AI excellence: How mature firms think, invest, and compete

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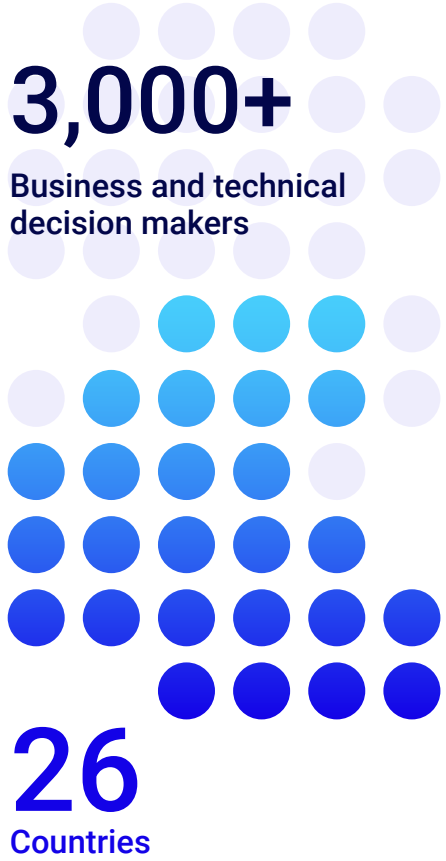
# Why are some closing the gap while others keep piloting?

**Spoiler: It started long before AI entered the picture.**

This isn't an AI story; it's a knowledge maturity story. Organizations with the most mature knowledge work practices don't just use AI better — they think differently, invest differently, and compete differently across nearly every business dimension. They're more profitable. They grow faster. They retain more clients. And they're more optimistic.

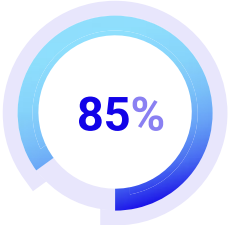
These industry leaders embrace the transformative nature of AI at rates that dramatically outpace their less mature peers. Not because they have higher budgets, but because they've built a knowledge-focused, AI-ready foundation that gives them the confidence and capability to move decisively. Their results demonstrate how proactive investment in knowledge maturity creates conditions where AI, and nearly everything else, delivers greater impact.

**That's what this playbook is about. Grounded in benchmark research across 3,000+ decision makers in 26 countries, it's a strategic guide for business leaders to turn AI potential into AI excellence — and a competitive advantage.**

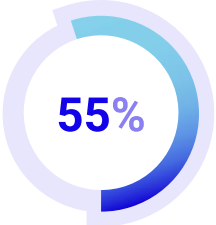


# The state of the market

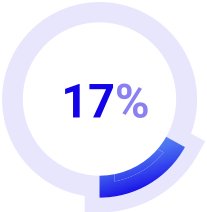
While nearly everyone has jumped on the AI bandwagon, few have fully incorporated it into their operations. Meanwhile, governance and training are lagging.



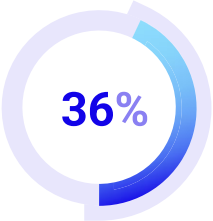

of organizations are using AI in some capacity



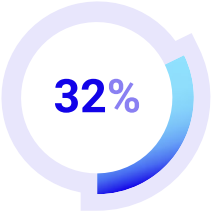

identify natural language query as the #1 AI use case




have fully integrated AI into workflows




have experienced an AI-related policy violation




cite integration with existing systems as the top adoption barrier

cite inadequate training as the #1 barrier to collaboration

# What separates high-maturity organizations

The research is clear: the differentiator isn't AI investment; it's knowledge maturity. AI amplifies the condition of your knowledge foundation, whether that means highlighting its shortcomings or its strengths. That's why the most mature organizations prioritize their information architecture. Systems and processes securely collect and continuously update cross-organizational data, rather than letting it stagnate in siloed files. Workers easily tap into the firm's collective know-how with complete traceability.

A mature knowledge foundation mitigates many common AI risks and gives leaders the confidence to proactively innovate. The financial impact is measurable and significant.

**4x**
more likely to be in the top financial performance quartile

28% of most mature vs 7% of least mature

**80%**
of the most mature firms operate at a profit

vs 54% of the least mature

**77%**
of the most mature firms grew revenue last year

vs 39% of least mature organizations

# The AI excellence playbook

# Delivering continuous impact through layered investments

> "It is all about IA, before AI. If AI is the train, information architecture is the tracks."

**Source:** Reena SenGupta, Executive Director, RSGI Limited, iManage Knowledge Work Benchmark Report 2026

Organizations often race into AI adoption. Research shows that attempting to deploy advanced AI capabilities on top of fragmented, unmanaged data promotes inaccuracies and unchecked knowledge reuse. Disjointed workflows, unreliable results, and weak oversight lead to unmitigated risks and unrealized ROI. Initiatives stagnate or fail entirely.

AI excellence requires layered investments. The execution sequence matters more than overall expenditure. Success does not hinge on demanding full construction of every phase prior to moving forward. Nor must every organization adopt every capability. It is a flexible framework, anchored by one non-negotiable groundwork step. Leadership then determines which additional elements are critical for their specific goals. Progression integrates AI as a seamless, horizontal capability into daily workflows.

**The following framework maps the six interdependent layers of AI-ready infrastructure — from the non-negotiable foundation to the human and organizational capabilities that allow the benefits of using AI to compound over time.**

## 1. Data Foundation

This is a non-negotiable starting point. AI is only as dependable as the data underneath it. Siloed, outdated content across email, shared drives, and disparate systems caps organizational performance, an outcome that shows up in every metric the research tracks.

A robust data foundation eliminates these issues through centralized storage, automated version control, and continuous lifecycle management. It turns static, scattered files into active knowledge assets. These core capabilities handle the behind-the-scenes work needed to maintain a structured, up-to-date ecosystem — the precise environment AI requires to produce trustworthy, accurate outputs.

Without this layer, AI initiatives quickly stall on unreliable data. Every subsequent investment, and the measurable business value it generates, relies entirely on having this trusted foundation in place.

**Common pitfall**
The return on AI investment depends on the strength of the underlying foundation. When content remains in silos across SharePoint, email, and local drives, no AI model, however advanced, can make up for that fragmentation.

## 2. Knowledge layer

AI delivers its highest returns when content is rich in context. A dedicated knowledge layer unlocks capabilities such as semantic search, automated tagging, template and clause recommendation, and expert identification. Passive information turns into actionable intelligence when it reveals a similar case in the same jurisdiction that can be used to build a better case, for example. When teams can easily find, reuse, and build upon institutional knowledge, the ROI of AI becomes highly measurable.

While not every team requires every feature, organizations that establish this layer consistently outperform those that don't. Consider natural language query — globally the top AI use case. Research reveals a significant adoption gap, as 58 percent of knowledge-mature organizations actively leverage it, compared to just 42 percent of their less mature peers.

**Common pitfall**
AI tools struggle to deliver value when, in the absence of a knowledge layer, they are forced to work through redundant, outdated, or trivial content (ROT).

## 3. Governance layer

Baking AI guardrails — such as permissions, ethical walls, matter-level confidentiality, and audit trails — into workflows establishes a rigorous chain of custody. These capabilities, along with policy enforcement and “shadow AI” controls, help ensure work is accurate, compliant, and defensible.

Governance doesn’t slow business leaders; it gives them the latitude to move faster and scale innovation safely. Of the 36 percent of organizations that suffered a measurable policy violation or data leak due to unregulated AI tools, those that invested in governance early were the least affected.

Security and compliance help earn client trust. The needs of clients directly shape AI usage for 57 percent of organizations. While nearly a third of organizations face frequent client restrictions on how they can use AI, the most mature knowledge organizations are far less likely to be limited because they govern so carefully. Governance sets them up for more collaborative partnerships with their clients.

**Common pitfall**
Governance with no clear owner is a misstep. Designate a leader and build AI guardrails into workflows for the best results.

## 4. AI infrastructure layer

Tools and processes that enable AI to access and work with existing systems unlock scale. In the past, this required multiple custom API integrations. Now, when the goal shifts from one AI tool to a coordinated AI ecosystem, organizations need only one MCP (Model Context Protocol) connection. MCP lets AI agents connect directly to existing knowledge and workflows, greatly reducing data duplication and silos. AI access is authenticated, permission-bound, and fully logged as the infrastructure automatically enforces ethical walls and compliance requirements.

Collaboration tools, external sharing, and workflow automations do not necessarily require AI infrastructure. But every firm aiming to scale innovation will eventually require it to truly make knowledge work across the entire enterprise.

**Common pitfall**
Committing to a single AI vendor’s closed ecosystem, before interoperability standards are established, limits flexibility down the road.

## 5. Workflow integration layer

Over half of organizations now allocate at least 10 percent of their total budget to innovation. The most mature invest across multiple capabilities, such as AI-assisted drafting, autonomous document workflows, and automated routing.

AI must natively embed into how teams perform daily tasks. Advanced capabilities do the heavy lifting of tasks such as summarization and data extraction. Human experts remain in control to apply nuance and judgment. This operationalizes expertise. For instance, 55 percent of the most mature organizations use AI to spot risks or anomalies in documents, compared to just 34 percent of their less mature peers.

Deep workflow integration is the ultimate ROI multiplier. It is why mature organizations are nearly twice as likely to securely integrate AI directly into their client-facing tools (46 percent vs. 24 percent). Even foundational workflow investments, such as external collaboration and process automation, deliver immediate value by breaking down silos.

**Common pitfall**
Workflows that don't align with how people actually work result in AI in innovation pilots that never come to fruition.

## 6. People and culture layer

The most mature organizations understand that AI amplifies an inadequate training gap rather than fills it. They invest in AI literacy across the firm, not just IT. Intentional change management and adoption programs make AI literacy a cultural capability rather than a technology project.

Training doesn't just enhance task completion; fifty-seven percent of the most mature organizations are already creating entirely new roles, such as trust architects, knowledge strategists, and digital ethics officers, to govern AI and innovate safely. Because their workers are trained to effectively use AI tools, they look to future scenarios, such as the "Autonomous Firm," "Cognitive Enterprise," or "Trust as a Service," with optimism.

**Common pitfall**
The maturity gap is significant. Almost six in ten mature organizations say AI is generating new roles. Among less mature organizations, only three in ten report the same.

# Five principles

# How mature knowledge organizations scale AI past the piloting phase

**Research reveals observable patterns in organizations whose knowledge maturity positions them to embrace AI as a transformative force rather than an incremental tool. Five principles distinguish leaders from aspirants.**

### 1 Data foundation before acceleration, no exceptions.

Organizations require a centralized, managed knowledge base before implementing and scaling AI. No amount of AI budget compensates for a broken foundation. The most mature organizations focused on their knowledge bases first.

### 2 Governance as a growth enabler, not a constraint.

Mature governance results in fewer violations, enhanced client trust, and broader permission to deploy AI. The organizations with the strongest governance are also the most aggressive AI adopters. That pattern is consistent across the research.

### 3 Invest in workflow.

Workflow capabilities such as collaboration, document sharing, and automation deliver value today. AI integration multiplies it. Mature organizations don't wait for perfect AI infrastructure to build better workflows. They improve workflows and integrate AI in parallel.

### 4 Listen to your clients.

They're already reshaping your mandate. Seventy-four percent of the most mature organizations say clients directly shape their AI strategy. Less mature organizations haven't begun to measure these expectations. The competitive gap between "we think our clients want AI" and "our clients are telling us what AI governance they require" is widening.

### 5 Sequencing determines ROI, not budget size.

The organizations that compound their advantage don't necessarily spend more. They spend in the right order. They understand that transformation is a progression, not a sprint. Counterintuitively, racing ahead may slow progress, and the research bears this out.

# The path to AI excellence

# The knowledge maturity dividend is real and measurable

Knowledge-mature organizations have stronger revenue trajectories, higher customer retention rates, and proactively scale their workforces. Nearly two-thirds recognize that their future competitive advantage will be dictated by their systems' ability to learn and adapt in real time. Their leading priorities are AI-powered knowledge management, autonomous workflows, predictive analytics, and client-facing AI.

However, their dividends aren't all AI ROI. Many are the compounding returns of knowledge maturity firmwide. Determine your next step today:

**Where is your foundation?** Take the 15-question AI readiness diagnostic to evaluate organizational capabilities and pinpoint strategic gaps. Capital shouldn't be committed without clear direction. The data is definitive: all subsequent investments depend entirely on a mature knowledge foundation.

**What is your sequencing plan?** Map current investments against the four-phase maturity roadmap. Market leaders aren't winning by outspending the competition; they're winning by pacing their investments. Moving too fast without a roadmap leads to costly friction. Real progress comes from building a strategic blueprint first.

**Where is your shadow AI exposure?** Unregulated AI tools create hidden risks, with the legal industry most affected by policy violations. Because leaders frequently miscalculate this exposure, conducting the shadow AI risk audit helps surface immediate compliance gaps. Establishing clear ownership over AI policy, compliance, and risk management must be an urgent priority.

**Business leaders who answer these questions candidly lay the groundwork for long-term AI excellence. Investing in a robust data foundation compounds business value and secures a sustainable competitive edge across every successive wave of AI innovation.**

**A strong foundation turns each wave of AI innovation into compounding business value. Get the data.**

**iManage Knowledge Work Benchmark Report 2026**

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