

## Above the Law Survey Results

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The business priorities  
and technical realities of  
small firms

Solo practitioners and small firm lawyers can sometimes feel like they're operating on an island, making their own way in the legal and business world without clear benchmarks to guide their decision-making.

Large firms have dedicated teams specializing in functions like information technology and marketing, for example, while small firm lawyers often wear many hats, relying on outside consultants, vendors, and their own instincts for guidance.

While this dynamic may encourage a wide variety of business and technology strategies among smaller firms, these firms still show broad consensus in many areas.

iManage partnered with Above the Law to understand the business and technical priorities of these firms, surveying more than 100 professionals at small and smaller midsize organizations.

We particularly sought to understand their progress toward achieving their business and technical priorities, as well as the role of artificial intelligence.

In several questions, we specifically asked about the significance and benefits of varied aspects of technology adoption.

Strong majorities – at least 70 percent of respondents – said they consider **every technical capability we proposed a significant priority to position their firm for success.**

While small firms clearly recognize the critical importance of technology to their long-term business goals, how are they faring in making this a reality so far?

We're pleased to share insights from our study.

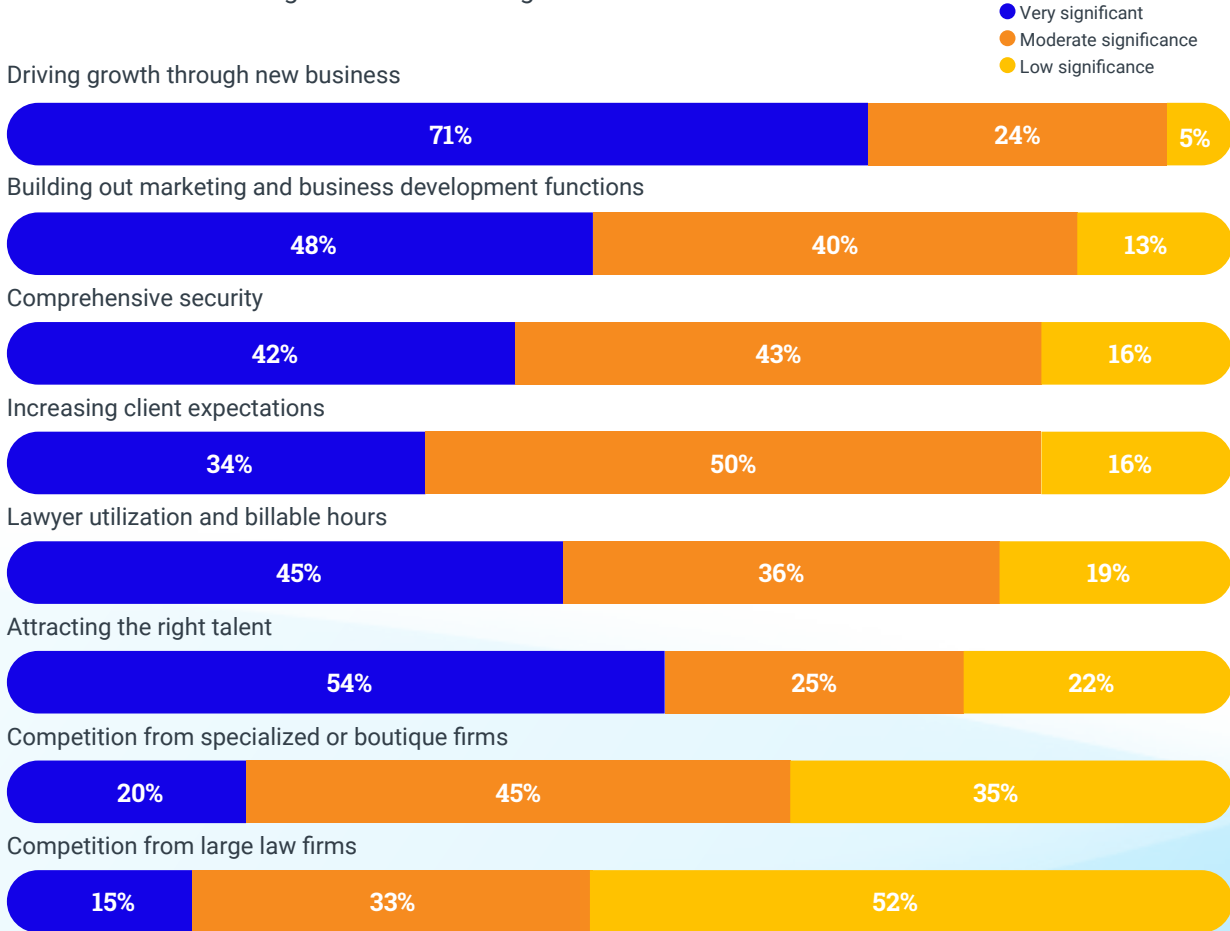


# The Business Priorities of Small Law

Generating new business will likely be the top priority for any private practice lawyer. Our respondents are certainly no exception, with that metric emerging as the clear winner.

## What do you see as the top business priorities for your firm today?

Please rate the following in terms of their significance.



One way to generate new business? Build out a marketing and business development function, which professionals surveyed rated as their second-highest priority.

Cybersecurity, another top-rated concern, remains a perennial focus in the industry.

Maintaining robust data security shows prospective clients that a firm is focused on the sanctity of their data, and it is simply good business (and often an ethical requirement) to maintain a top security system.

It's also an area that presents business challenges for small firms.

In a prior [iManage/Above the Law survey](#) focusing on cybersecurity issues, 75 percent of respondents said clients perceive large firms as having better data security than smaller firms – and **92 percent said this was a business advantage.**

Many of these respondents also stated that clients had become more focused on cybersecurity following the pandemic.

The respondents to our latest survey don't rank competition from other types of firms among their highest-priority areas, likely reflecting how small firms have created their own differentiated offerings.

When it comes to cybersecurity, however, emerging technologies still allow smaller firms to overcome the perceived cybersecurity advantage of their larger counterparts identified in the prior study.

In particular, some of the prior survey's respondents said that the cloud is more secure than on-premises technology. This levels the playing field for small firms that adopt this technology, while providing tangible business benefits.

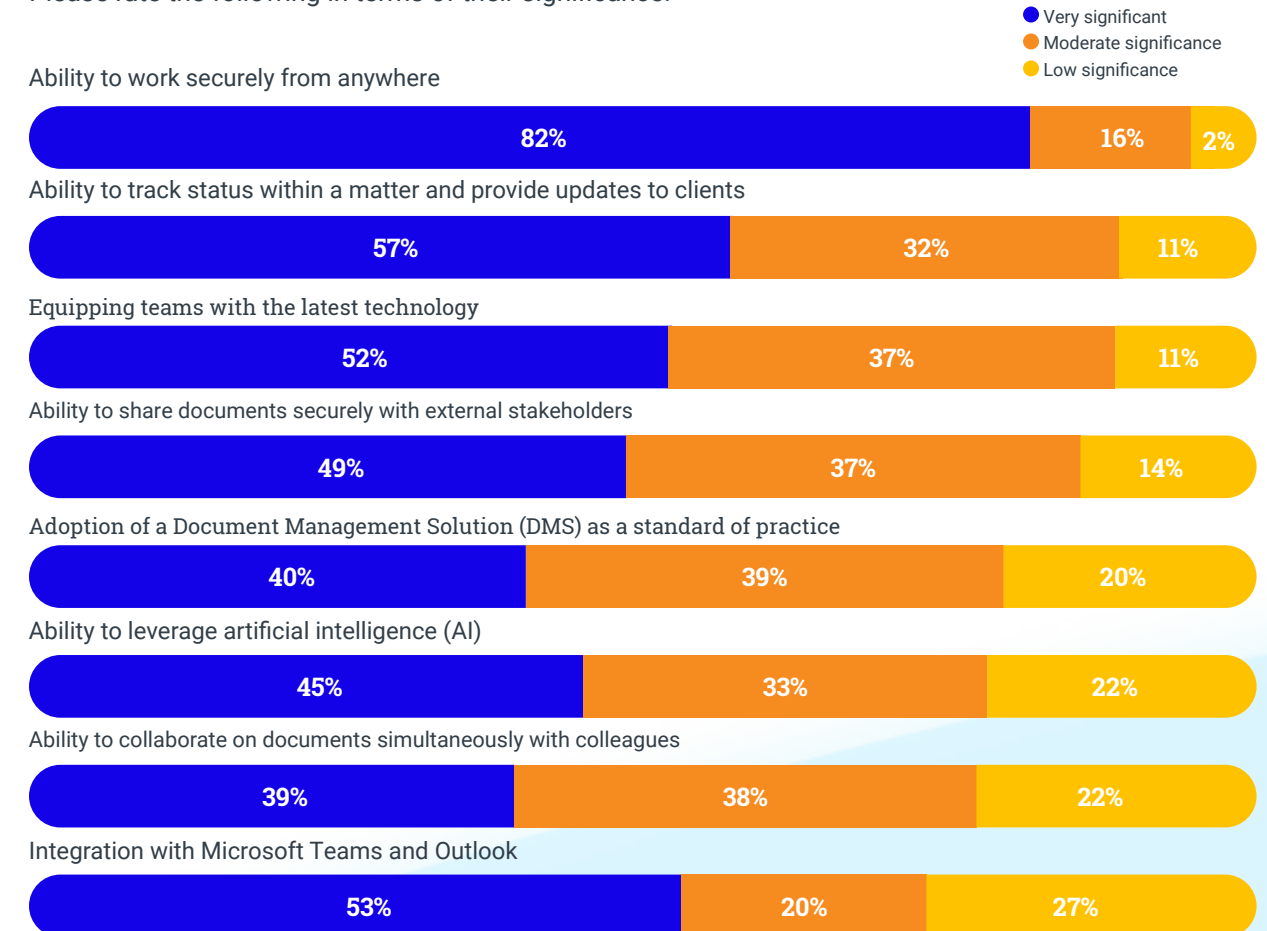
In parallel, data security – namely, “the ability to work securely from anywhere” – was the top-ranked response to the technical priorities of small firms in the current survey. This signals that the ability to thrive in a hybrid and remote workplace has become table stakes for lawyers at all levels.

“Ability to work securely from anywhere” opened up a striking gap with all of the other presented options for technical priorities, including even hot-button areas like “ability to leverage artificial intelligence.”

And while secure remote work led the pack, it's also notable that respondents gave a high level of weight to every listed technology category, signaling that this group has a strong awareness of the benefits of legal tech.

## What do you see as the top technical priorities to position your firm for long-term success?

Please rate the following in terms of their significance.



# Small Firm Realities

So if small firms are focused on improving virtually all aspects of their technology adoption, how much success have they had so far?

The results are decidedly mixed.



## How prepared is your firm to achieve those priorities?

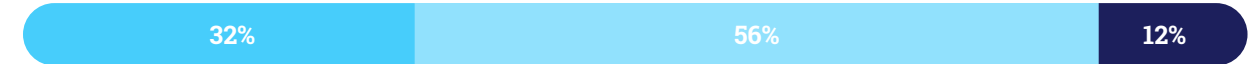
Please indicate your level of agreement with the following statements.

● Strongly Agree  
● Agree  
● Disagree

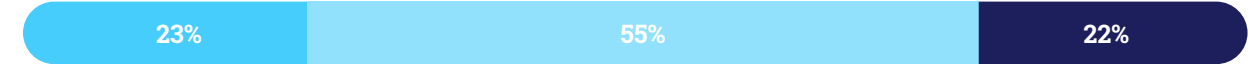
I can work securely from anywhere



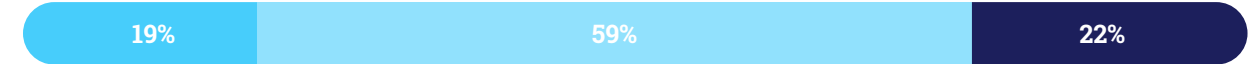
I can easily and securely share documents with external stakeholders



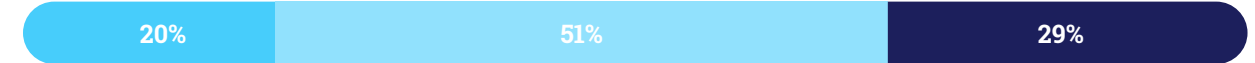
I can track status within a matter and provide updates to clients



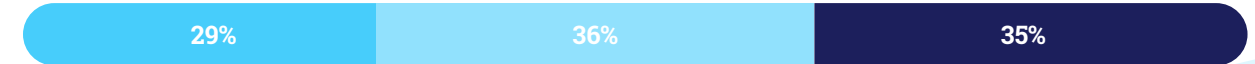
Our teams are equipped with the latest technology



I can collaborate on documents simultaneously with colleagues



A DMS has been adopted as a standard of practice



My applications are integrated with Outlook



My applications are integrated with Microsoft Teams



My firm is currently leveraging AI



My firm is trialing an AI solution



In many areas, our survey respondents reveal a large gap between what small firms prioritize and what they're able to achieve — at least so far.

For example, almost 90 percent of respondents told us that having the latest technology was significant, with more than half rating it “very significant.”

But a much smaller proportion of our respondents said their firms already have the latest tech in place — and far fewer said they strongly agree that they do.

Or consider document management systems — a critical tool in the quest for secure remote work and a must-have for firms seeking to leverage advanced tools like generative AI.

Implementing a solid DMS is the first step in organizing, managing, and securing critical content — which is foundational for firms seeking to implement cutting-edge technologies.

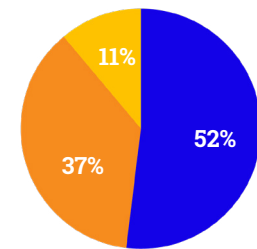
Modern document management systems create a single repository that allows users to securely share files and collaborate on documents with clients, partner firms, and external partners.

The best tools are frictionless, facilitating collaboration and coordination without compromising security or productivity.

They ultimately provide security, efficiency, and the ability to add the newest features offered by AI.

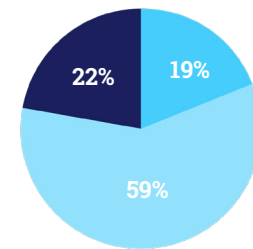
### Equipping teams with the latest technology

**Level of Priority:**  
Equipping teams with the latest technology



- Very Significant
- Moderately Significant
- Low Significance

**Firm's Current Capability:**  
Our teams are equipped with the latest technology

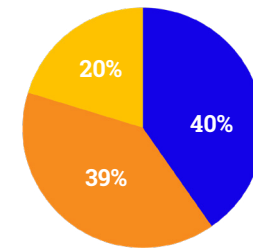


- Strongly Agree
- Agree
- Disagree

However, while 80 percent of respondents said the adoption of a document management solution as a standard of practice is a priority, less than two thirds said their firms currently have a DMS.

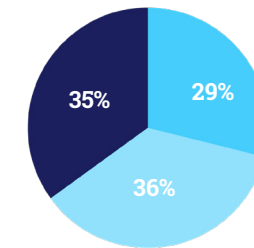
### Adoption of a DMS as a standard practice

**Level of Priority:**  
Adoption of a Document Management Solution (DMS) as a standard of practice technology



- Very Significant
- Moderately Significant
- Low Significance

**Firm's Current Capability:**  
A DMS has been adopted as a standard of practice



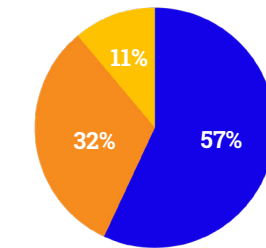
- Strongly Agree
- Agree
- Disagree

In other document management-related capabilities, nearly 90 percent of survey respondents rated having the ability to track status and update clients as at least “significant,” with 57 percent rating it “very significant.”

But only a fraction of that amount “strongly agree” that they currently have these capabilities.

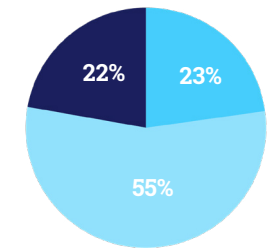
### Ability to track status within a matter and provide updates to clients

**Level of Priority:**  
Ability to track status within a matter and provide updates to clients



- Very Significant
- Moderately Significant
- Low Significance

**Firm's Current Capability:**  
I can track status within a matter and provide updates to clients



- Strongly Agree
- Agree
- Disagree

Lawyers at small firms must fulfill varied roles. When it comes to technology, they must compete with niche experts in an area in which lawyers likely have no formal training.

It's not surprising, then, that these respondents report a gap between what they view as significant and what they're able to achieve.

This is where an expert vendor can be transformative, guiding the setup and ongoing success of a cutting-edge system that positions the firm for better long-term business outcomes.

# Small Firm Views on AI

As ILTA CEO Joy Heath Rush recently noted, law firms can be in a “race to be second” when it comes to technology adoption – and even follow-on firms must be wary of becoming “lemmings.”

This is particularly so for the continued integration of advanced forms of artificial intelligence into legal practice. It may apply even more strongly to smaller firms, which often must navigate this technical terrain without the benefit of robust technology staff.

Our respondents reflect this mix: they acknowledge the upsides of artificial intelligence for their business while signaling a deep wariness of potential risks.

To start with the benefits: A strong majority of our respondents “agree” or “strongly agree” with every potential benefit listed in the survey.

## What do you see as the greatest benefits of AI?

Please indicate your level of agreement with the following statements.

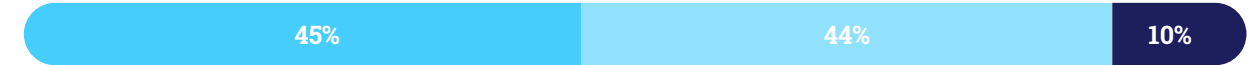
- Strongly Agree
- Agree
- Disagree

*AI-enabled solutions will facilitate the following:*

Provide document or contract summaries



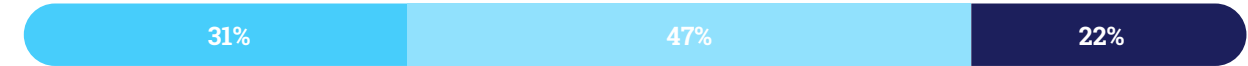
Create new documents



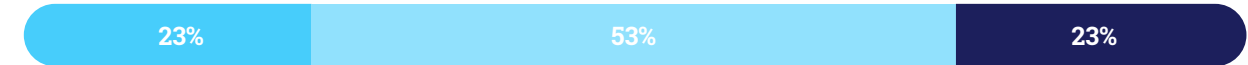
Improve finding up-to-date content easily



Automate signature process



Automate approvals across documents



Provide comprehensive discovery



But however bullish small firms may be on the promise of AI, they're even more wary of the potential downsides — particularly the ones that have generated recent headlines.

Cybersecurity and ethics are top concerns for small firms around AI adoption. While firms may be excited about AI tools, they don't know if they can trust them.

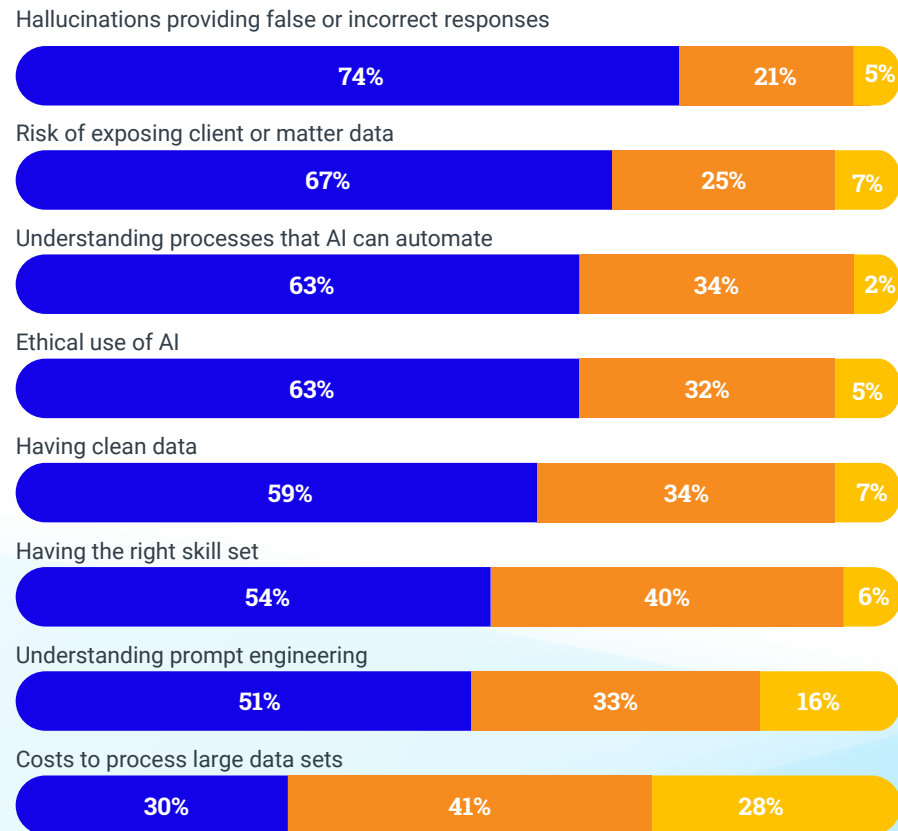
Survey respondents said they were most concerned about hallucinations providing false responses, exposing client data, and understanding how AI can help automate their firm processes.

Law firms are looking for AI applications with advanced security features to keep client data safe.

### What are your greatest concerns with respect to AI?

Please rate the following in terms of their significance

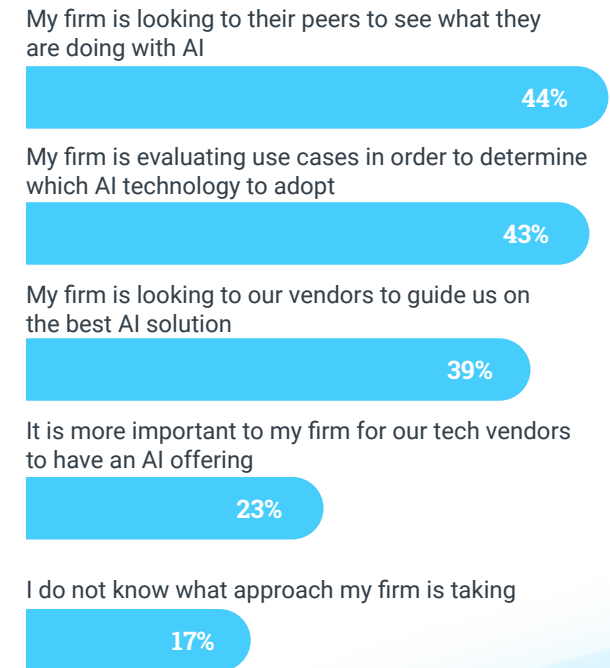
- Very Significant
- Moderately Significant
- Low Significance



As a result, they're clearly testing the waters, seeking guidance from multiple sources.

### How is your firm seeking guidance around the adoption of AI?

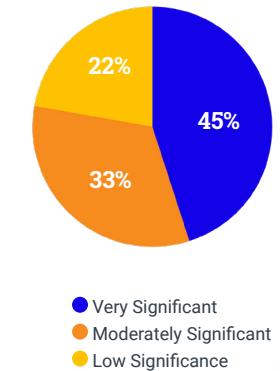
Please select all that apply.



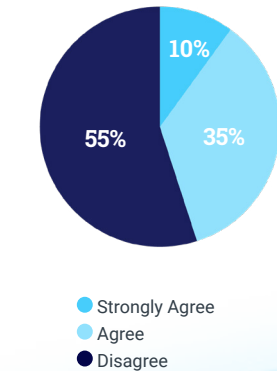
Nearly 80 percent of those surveyed consider the ability to leverage artificial intelligence a top priority, but less than half say their firm is currently leveraging AI or trialing an AI solution.

### Ability to leverage AI

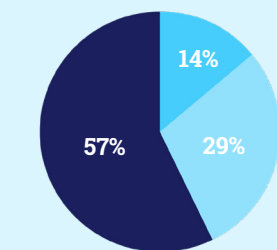
Level of Priority: Ability to leverage artificial intelligence (AI)



Firm's Current Capability: My firm is currently leveraging AI



Firm's Current Capability: My firm is trialing an AI solution





# A Small Firm's **Long-Term Success**

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If there's one common thread that runs throughout this survey, it's the difference between small firms' views of the significance of tech, and small firms' views of their progress on tech.

The survey findings reflect an industry where many small firms must fulfill varied responsibilities beyond the practice of law – which itself can be a relentlessly demanding occupation.

In private practice, time is the most valuable resource, and the idea of prioritizing tech adoption over client work can be a nonstarter. So is the idea of investing hundreds of lawyer hours in bringing on a new system.

As lawyers who have little technology training hesitate to lead a project whose outcome and ROI seem uncertain, “this is the way we've always done it” becomes an increasingly persuasive idea.

And as new tools are unveiled on an almost daily basis, this whole prospect can seem overwhelming.

But here's the rub.

As the survey respondents overwhelmingly indicate, none of these factors make effective technology adoption any less critical to a small firm's long-term success.

So what's the best course of action?

For firms that find themselves in this situation, the key is to simply get started and continue to move ahead.

The right vendor can provide the proper support and guidance to implement foundational systems with minimal disruption to the firm.

This approach will make tech adoption manageable – instead of a major shock to your firm, your system will receive continual updates through concrete, achievable goals that build on one another.

Every small investment accumulates, advancing your firm toward the cutting edge of legal tech adoption – including the ability to harness advanced forms of AI effectively and securely.

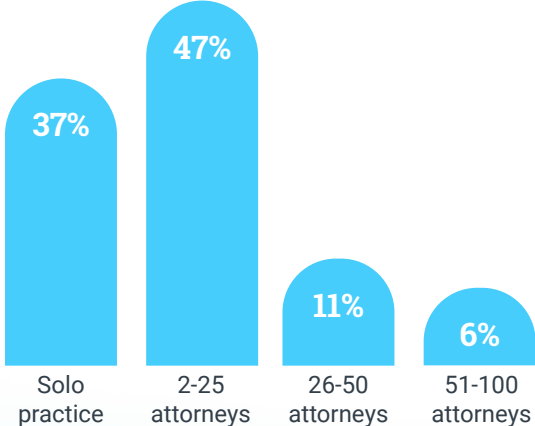
iManage, for example, is approaching AI from a practical perspective, building it into our platform and delivering the data foundation that is essential for its use.

The **right vendor** can provide the proper support and guidance to **implement foundational systems** with minimal disruption to the firm

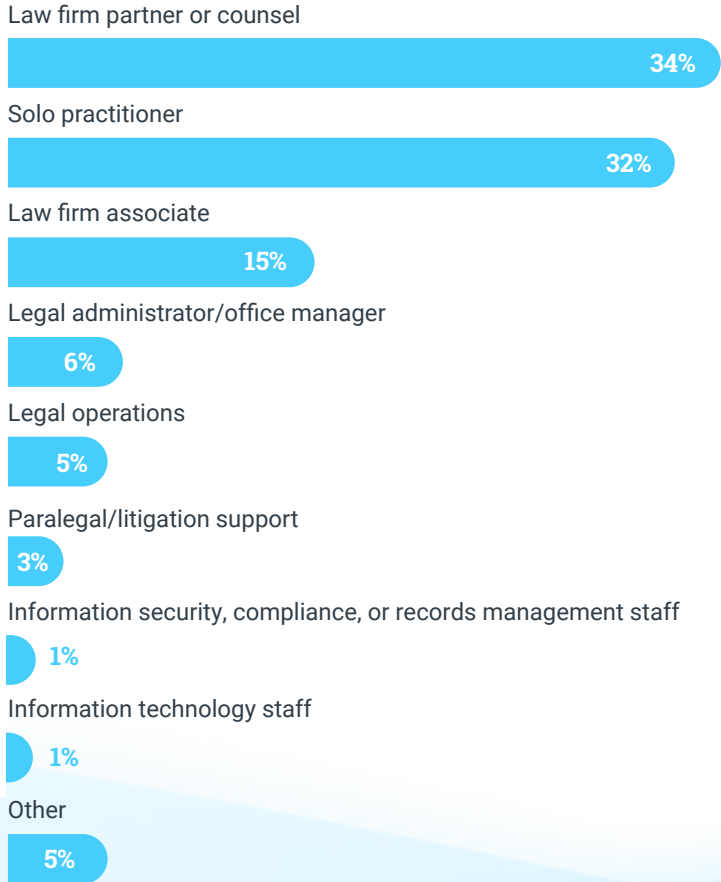
# Respondent Demographics

Survey respondents self-reported their demographic information in response to an Above the Law survey circulated in March and April of 2024.

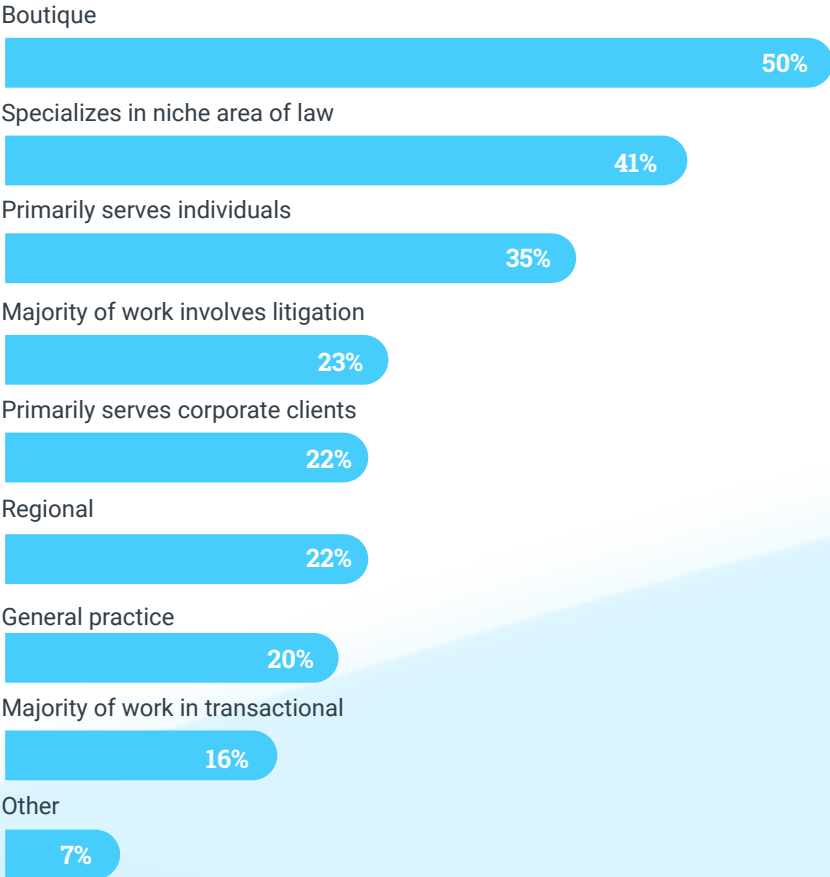
## Which best describes the size of your firm?



## Which of the following best describes you?



## Which of the following terms would you use to describe your firm, if any? Please select all that apply.






We are well positioned to evaluate a law firm's technology needs and are working tirelessly to create this path for small firms.

We'll be happy to review your firm's tech stack and help you [achieve your business goals](#).

To learn more about **iManage Work 10** or the **iManage Cloud**, visit our [website](#).

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