GROUND YOUR LEGAL AI STRATEGY FIRMLY IN THE BASICS

iManage

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The ongoing media buildup of artificial intelligence and the sustained interest of the legal community — particularly in generative AI — is a force unto itself. And, full disclosure, iManage is as invested in AI and as interested in promoting it as the rest of the industry. At the same time, our recent learnings from end users crystalized insights we had not intuited, and which we are keen to share with our community. Chief among them is the revelation that legal professionals hold a more nuanced view of their current work environment and the urgency to embrace AI than all the hoopla may imply.

What do we mean by "nuanced"? Fair question. In a recent survey of experienced law firm professionals and legal technology users, the data signaled a missed, or potential opportunity for their firms to pick the low-hanging fruit before levitating to the top of the technology tree. Put simply, their responses make it evident that there is still room to improve the effectiveness of existing technology investments — and a need to make that a priority.

Lawyers seem to be suggesting that a renewed commitment to using foundational systems such as document management to promote greater efficiency, security, and collaboration is a vital precursor to driving AI capabilities. Survey results emphasize cultivating broader user adoption, making better use of workflow integrations, and saving legal documents with their related communications within a dedicated single repository.

This puts us on notice that, as we evaluate the potential of AI capabilities, it is equally critical for legal leaders to assess an organization's foundational technology stack, with a keen eye on usage. This assessment should identify any gaps, determine the steps needed to fill them, and prioritize firm-wide adoption of current capabilities to be certain that any future investment — be it in AI or wherever else the future leads — is maximally effective.

About the survey

This research, commissioned by iManage with SA Market Insights, provides a strong global perspective on lawyers' views regarding technology and legal operations. The respondent pool skews slightly male, the majority of whom are lawyers with 5 to 20 years of experience, Many have been at their current firms for a significant portion of their careers.

Key Groups Analyzed in Report

Market

| US | UK | Europe | APAC |

Firm Employee Size

50 or less	51-250	More than 250
n=412	n=420	n=413

Sample Sizes

Sample Size Achieved: n=1,245

Markets:
US | n=313   Europe | n=309
UK | n=316   APAC | n=307

Europe:
Germany (n=78), Denmark (n=75), France (n=79), Spain (n=77)

APAC:
Australia (n=77), Singapore (n=75), China (n=79), India (n=76)

Reality counters expectations

AI and predictions of how it will transform the industry began to permeate legal technology culture when OpenAI released ChatGPT in late 2022. The media domination of generative AI continued its rocket-like trajectory with the announcement of ChatGPT-4's availability in 2023. It can hardly be said to have abated in 2024, and here we are in 2025.

Promising increased efficiencies, quicker onboarding and upskilling, and inferring new billing models on the horizon, AI has crept into every conversation, taken over technology roadmaps, and governed the content of every conference. Legal tech media remains firmly trained on its favorite topic in 2025, even if some of the media's audience remain cautious.

To editorialize a bit, as pressure ticks up from clients wanting firms to demonstrate how they are using AI, we've sensed a shift in thinking about AI that runs parallel with the question of reasonable billing practices for AI-assisted work.

In view of these competing client pressures affecting law professionals, we weren't entirely sure what to expect from our survey about their critical document practices. We focused our questions on the importance of key features in creating, managing, securing, and accessing these sensitive materials. To be honest, we anticipated that all roads would lead to AI.

When the responses took a different direction, we were surprised, to say the least. This is not to say that AI is ever far from law professionals' minds — how not? However, a solid majority of those we surveyed expressed a desire for solutions that address basic functionality to relieve pain points and enable legal users to be more productive, efficient, and responsive to their clients. Basic functionality. Not AI.

Take a foundation-first approach

Respondents crave a strong core set of foundational tools that can be enhanced with added capabilities like those promised by AI as their firms advance in their technical sophistication.

The hierarchy of priorities is focused on bedrock competencies, placing them above advanced features like generative AI, and emphasizing their importance. The highest-ranking responses include such fundamental requirements as:
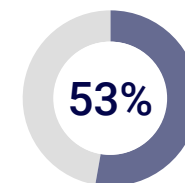
- Repositories for storing and retrieving precedents and templates
- Automated monitoring to ensure compliance
- Compatibility with e-discovery platforms
- Internal real-time collaboration tools and workspaces

When thinking of a document management solution… What is most important to you?
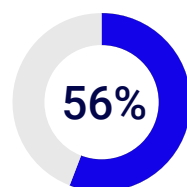
56% Repositories for storing and retrieving legal precedents and standardized templates

53% Internal collaboration tools (e.g., shared workspaces, real-time editing, and messaging)
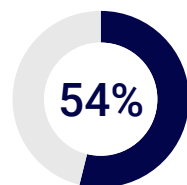
54% Automated monitoring to ensure compliance with legal standards and data privacy laws
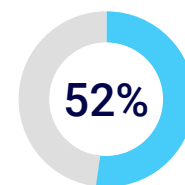
52% Direct access to legal research tools, databases, and case law repositories
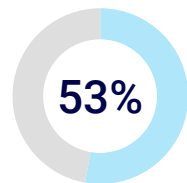
53% Compatibility with e-discovery platforms to facilitate document review and evidence management
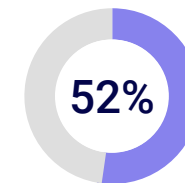
52% Advanced encryption and access controls to protect sensitive legal data

Higher-order functions such as AI-powered search for contextual results, advanced search capabilities, and generative AI-related tools like data or analytics dashboards earned lower priority.

While AI-led advancements remain important for end users, the most direct route for leaders to meet the needs of workers is through better actualization of core tech capabilities. Establishing the necessary foundation for AI adoption while setting up your teams to achieve the anticipated ROI of existing investments is a win-win proposition.

Be wary of the drive to leapfrog competitors in the race to appear more tech-forward. This can seriously backfire, doing more harm than good. Until teams are fully bought into and using existing technologies proficiently, introducing tools with advanced capabilities is likely to yield disappointing results.

Yes, explore them — lay the groundwork — but wait until people are ready before you implement them at scale. Investing hard dollars in new technology with a very high bar to success rarely ends well.

Lower-priority concerns
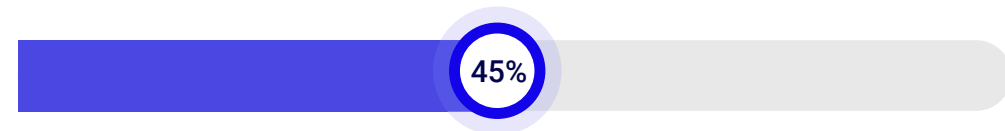
45%

AI-powered search for contextual results based on keywords, tags, or document content

39%

Advanced search functionality to quickly locate documents

31%

Tools to help us leverage generative AI

31%

Generative AI tools to streamline work

30%
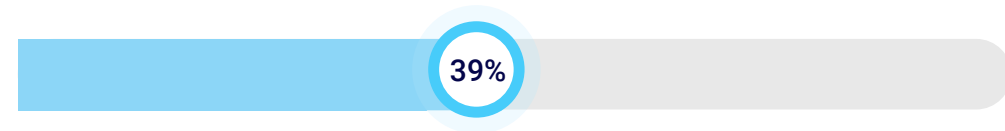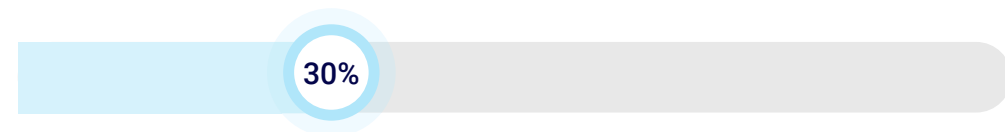
Predictive analytics to identify trends and recommend actions

Global variations exist, but no curveballs

Responses were mostly consistent across regions, with a few exceptions.

Asia Pacific

Embedded training modules for onboarding are a priority, but there is less emphasis on direct access to legal research tools (36% vs. a global average of 50%). Asia Pacific also ranks automated tagging and categorization lower than the global average at 38 percent versus 50. This group shows a stronger interest in AI-powered search for contextual results than its peers from other countries, but did not rank high enough overall to be included in the chart at right.

US

Case tracking systems ranked highest here (64% versus 52% globally), which, due to the higher volume of litigation, is not surprising. US attorneys also place greater emphasis on internal collaboration tools (61% vs. 53% globally) and automated document tagging (59% vs. 38% in APAC; 51% globally).

UK and Europe

Europe puts less importance on a single repository for documents, emails, and chats, as well as having external collaboration portals. Generative AI solutions are a lower priority in the UK.

|	Overall	Market			
		US	UK	Europe	APAC
Repositories for storing and retrieving legal precedents and standardized templates	**56%**	59%	60%	53%	47%
Automated monitoring to ensure compliance with legal standards and data privacy laws	**54%**	59%	57%	51%	49%
Compatibility with e-discovery platforms to facilitate document review and evidence management	**53%**	58%	48%	49%	58%
Internal collaboration tools (e.g., shared workspaces, real-time editing, and messaging)	**53%**	61%	48%	48%	53%
Direct access to legal research tools, databases, and case law repositories	**52%**	60%	53%	58%	36%
Advanced encryption and access controls to protect sensitive legal data	**52%**	45%	56%	50%	55%
Systems to organize and track cases, clients, and associated documentation	**52%**	64%	55%	49%	37%
Tools to identify subject-matter experts within the firm based on case history or authored documents	**51%**	58%	51%	48%	50%
Automated tagging and categorization of documents for efficient organizations	**51%**	59%	53%	55%	38%
System to encourage sharing of best practices and expertise across the firm	**50%**	53%	47%	50%	49%
Embedded resources and training modules to onboard new staff or educate teams about firm specific knowledge assets	**48%**	45%	49%	45%	53%
Document categorization by practice area, jurisdiction, or legal issue	**48%**	46%	48%	50%	47%
Documents, emails and chat communications managed in a single repository	**47%**	53%	53%	33%	48%
External collaboration portals for working with clients or co-counsel securely	**47%**	53%	49%	33%	51%

Most important solutions

The surprisingly small impact of size

In the legal industry, which has nearly universally accepted definitions of what constitutes small, midsize, and large law, size is a core part of a firm's identity. It is notable, then, that technology priorities in the aggregate were more similar than not, regardless of the survey respondents' firm size. There are a few notable exceptions:

Larger firms (250+ employees)

At 42 percent, embedded training modules are less important to these respondents, perhaps owing to the stronger likelihood that dedicated training and a fully staffed IT function are on hand to support technology users in a large organization.

Internal collaboration tools, tools to identify SMEs, and systems to encourage the sharing of best practices and expertise appear to be a lower priority in large firms (46%), as well. This may speak to their firms making recent strides in collaboration and knowledge that make it feel like a problem already solved, or well on its way. These practitioners are now looking for more advanced capabilities around finding things, illustrated by the 52 percent who prioritize document categorization by practice area, jurisdiction, or legal issue — which ranks 5 to 7 points lower in priority for small and midsize firms, respectively.

Smaller (50 or less employees) and midsize (51 – 250 employees) firms

These firms are more likely to prioritize dashboards and reports to provide insights into frequently used resources and AI-powered search for contextual results, neither of which placed highly, overall.

Most important solutions	Overall	Market		
		50 or less	51-250	More than 250
Repositories for storing and retrieving legal precedents and standardized templates	56%	57%	58%	52%
Automated monitoring to ensure compliance with legal standards and data privacy laws	54%	58%	57%	47%
Compatibility with e-discovery platforms to facilitate document review and evidence management	53%	56%	53%	50%
Internal collaboration tools (e.g., shared workspaces, real-time editing, and messaging)	53%	57%	56%	46%
Direct access to legal research tools, databases, and case law repositories	52%	55%	52%	49%
Advanced encryption and access controls to protect sensitive legal data	52%	53%	55%	49%
Systems to organize and track cases, clients, and associated documentation	52%	54%	52%	50%
Tools to identify subject-matter experts within the firm based on case history or authored documents	51%	52%	56%	46%
Automated tagging and categorization of documents for efficient organizations	51%	52%	51%	51%
System to encourage sharing of best practices and expertise across the firm	50%	49%	55%	46%
Embedded resources and training modules to onboard new staff or educate teams about firm specific knowledge assets	48%	52%	51%	42%
Document categorization by practice area, jurisdiction, or legal issue	48%	47%	45%	52%
Documents, emails and chat communications managed in a single repository	47%	50%	47%	44%
External collaboration portals for working with clients or co-counsel securely	47%	47%	49%	44%

Map the need to the opportunity

The contradiction that foundational tools are considered essential yet adoption remains low emphasizes the need — or opportunity — for law firms to make their technology investments pay better dividends. According to the research, there is a gap between the capabilities legal users deem important and their actual technology usage. Organization leaders can achieve the greatest immediate impact by facilitating stronger adoption to fill this gap.

We followed the research to find other areas ripe for improvement by comparing how legal professionals rank tech capabilities against their actual usage patterns. And the winners are [drumroll]:

• Enhanced repositories for legal precedents and templates

• Automated compliance monitoring to ensure data and privacy laws are met

• Expertise identification tools within firms

• Knowledge-sharing systems to encourage best practice dissemination

• Insights dashboards and reports

• AI-powered search for contextual legal research

Many organizations invest in a document management system (DMS) only to find that low adoption makes it a challenge to realize the targeted ROI of their technology. Low user adoption stems from a variety of issues, most of which can be resolved using effective solutions and document management practices.

❌ **Problem:** Bespoke applications that require users to move out of a governed repository to get work done rob time and focus, impact continuity, and put document security at risk.

✔ **Solution:** A modern, cloud-native DMS platform integrates with essential tools, bringing them into one ecosystem for a seamless, secure, reliable, and user-friendly experience.

❌ **Problem:** Finding answers in documents — or even the best person to ask — is frustrating and slow, verging on impossible, due to information silos and inadequate search tools.

✔ **Solution:** One clearly organized repository for all documents, emails, and chats, and a powerful search function, deliver personalized results at the speed of work.

❌ **Problem:** Security features are cumbersome, causing legal professionals to use workarounds that compromise compliance and data integrity and inhibit adoption.

✔ **Solution:** Advanced security embedded into documents throughout their life cycle means users never have to give it a thought — but they appreciate knowing it's always there.
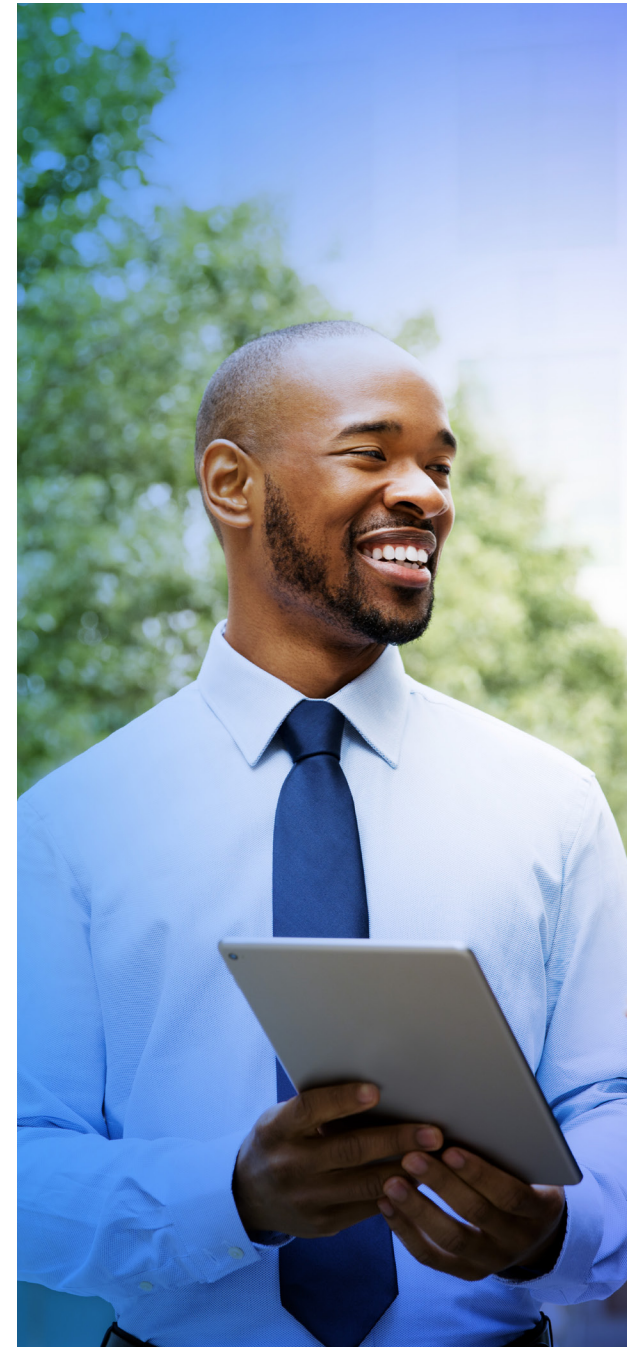
Low DMS adoption can quickly produce data silos, compliance failures, and unnecessary exposure to security risks. But every extra step erodes efficiency. Scrutinized by billable hours and write-offs, lawyers need solutions that reduce friction, streamline workflow, and alleviate security concerns to promote working within the system rather than outside it.

Moreover, as firms look to add generative AI to their toolkit and skillsets, strong document management becomes all the more critical. AI-driven insights depend on clean, relevant, and accurate data.

A well-structured and accessible document repository reinforces best practices.

These insights provide a valuable roadmap for firms still contemplating how to invest in solutions that enable them to keep growing into future capabilities. Understanding what legal professionals need to efficiently manage their document workflows can help organizations make informed, strategic DMS investments that drive adoption and deliver lasting value.

Importance x Usage

Importance Range: 29% to 56%
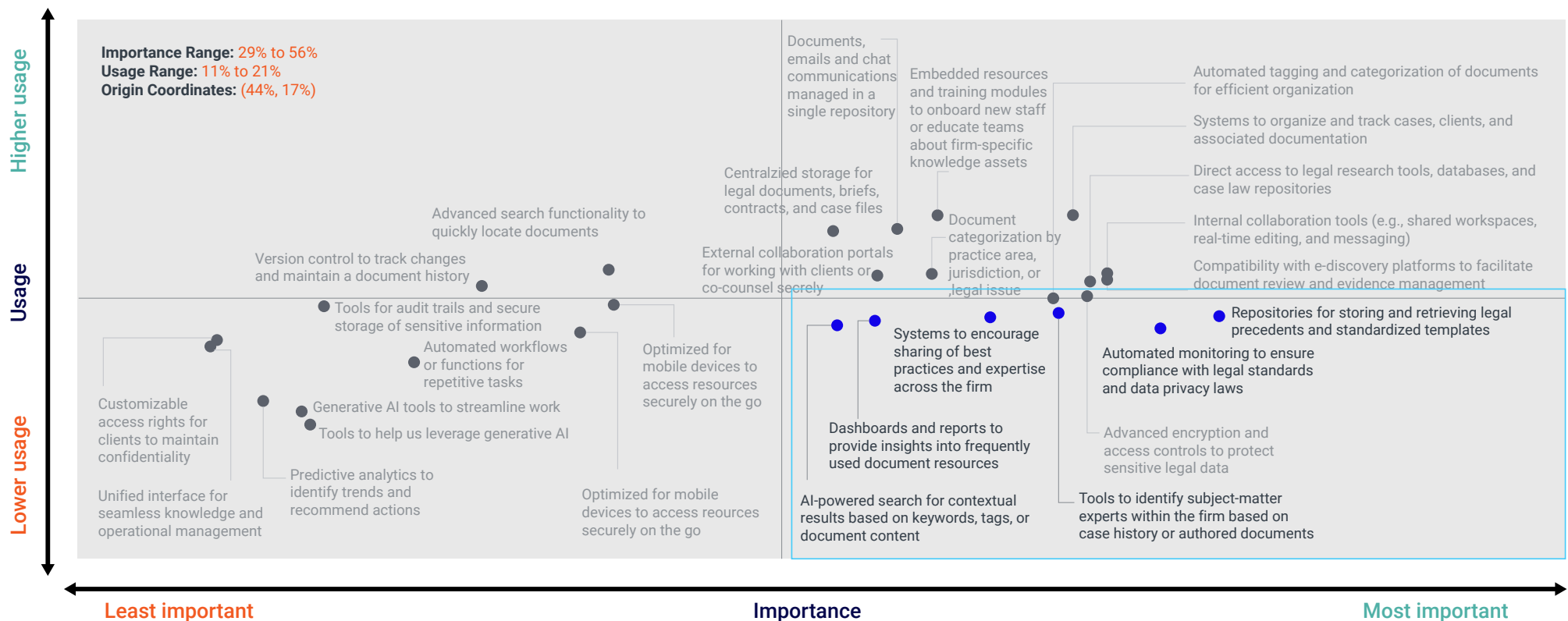**Usage Range:** 11% to 21%
Origin Coordinates: (44%, 17%)

Higher usage

Usage

Lower usage

Documents, emails and chat communications managed in a single repository

Embedded resources and training modules to onboard new staff or educate teams about firm-specific knowledge assets

Automated tagging and categorization of documents for efficient organization

Systems to organize and track cases, clients, and associated documentation

Centralzied storage for legal documents, briefs, contracts, and case files

Direct access to legal research tools, databases, and case law repositories

Advanced search functionality to quickly locate documents

Document categorization by practice area, jurisdiction, or legal issue

Internal collaboration tools (e.g., shared workspaces, real-time editing, and messaging)

External collaboration portals for working with clients or co-counsel secrely

Compatibility with e-discovery platforms to facilitate document review and evidence management

Version control to track changes and maintain a document history

Repositories for storing and retrieving legal precedents and standardized templates

Tools for audit trails and secure storage of sensitive information

Systems to encourage sharing of best practices and expertise across the firm

Automated monitoring to ensure compliance with legal standards and data privacy laws

Automated workflows or functions for repetitive tasks

Optimized for mobile devices to access resources securely on the go

Customizable access rights for clients to maintain confidentiality

Generative AI tools to streamline work

Dashboards and reports to provide insights into frequently used document resources

Advanced encryption and access controls to protect sensitive legal data

Tools to help us leverage generative AI

Predictive analytics to identify trends and recommend actions

Optimized for mobile devices to access reources securely on the go

AI-powered search for contextual results based on keywords, tags, or document content

Tools to identify subject-matter experts within the firm based on case history or authored documents

Unified interface for seamless knowledge and operational management

Least important

Importance

Most important

Reap the benefits of strong adoption

Ensuring legal professionals adopt foundational document management is key to long-term success. Strong adoption of qualified solutions delivers significant benefits across markets, with legal professionals acknowledging several key advantages:

- Increased efficiency and productivity allows teams to work more effectively, reducing time spent on administrative tasks.

- Stronger risk management and compliance ensure that sensitive information is handled securely and in accordance with regulatory requirements.

- Improved quality and consistency of work help maintain accuracy and reliability across documents.

- Enhanced client service enables firms to respond more quickly and effectively to client needs, ultimately strengthening relationships and competitive positioning.

While these benefits are universally recognized, remote and mobile access is particularly critical in Europe, where it is ranked as the top benefit overall.

	Overall	Market			
		US	UK	Europe	APAC
Enhanced efficiency and productivity	**30%**	29%	31%	29%	32%
Risk management and compliance	**28%**	27%	28%	28%	29%
Improved quality/consistency	**27%**	27%	32%	23%	27%
Better client service	**27%**	29%	24%	29%	27%
Knowledge retention	**26%**	26%	27%	26%	26%
Improved collaboration	**26%**	28%	26%	25%	26%
Scalability and adaptability	**25%**	23%	25%	27%	25%
Cost savings	**24%**	29%	26%	22%	21%
Remote and mobile access	**24%**	19%	22%	31%	23%
Strategic decision making	**22%**	21%	24%	18%	25%
Competitive advantage	**21%**	22%	19%	20%	22%

Chart the way forward

The responses indicate that there is still room to improve the effectiveness of existing technology investments and a need to make this a priority. A renewed commitment to promoting efficiency, security, and collaboration via foundational systems such as document management may be an essential bridge to enabling employees to achieve proficiency in the application of any AI capabilities you introduce.

And, as you evaluate the potential of AI for your firm, look closely at your technology stack. Are the tools used most by workers integrated to minimize context switching and the associated inefficiencies and frustrations? Are search tools slowing people down or is data too siloed to be easily found? Is it a chore for them to collaborate securely? Identify pain points that inhibit adoption of tools or processes and take steps to allay them.

The survey data show that firm size plays a minor role in determining priorities for success. Firms of all sizes can derive substantial value from:

•   Improving user adoption of an existing DMS solution

•   Achieving smoother integration with existing workflows

•   Establishing a single repository to lay the groundwork for AI-driven capabilities

Focusing your attention in these areas may be the shortest route to realizing the full benefits of document management while fostering long-term success in an increasingly digital and knowledge-driven landscape. Global variations also highlight the importance of adapting your strategies to regional regulatory environments and operational norms. But to get the maximum value from any future investment — be it in AI or wherever else the future leads — leaders must evangelize firm-wide adoption of current capabilities.

With robust adoption of a high-performing document management system your law firm has a clear path to enhanced efficiency, security, and collaboration. Consider an integrated platform approach to minimize context-switching and make search a breeze. Look for one that has proactively built AI into its architecture to significantly lower the bar to adoption and keep security concerns to an absolute minimum.

Whether you are building and refining your foundational toolset to increase adoption or looking to provide more advanced capabilities to users who are ready to take the next steps, a modern DMS on a secure, integrated cloud platform is the right way forward.

iManage Knowledge Work Maturity Model™

We live and work in an era where knowledge is the new currency. This carries power, opportunity, and pure potential. Knowledge workers excel when they can tap into the collective know-how of their organization. How can leaders help their workforce to activate the firm's knowledge and secure its future?

We answered this need by creating an actionable framework grounded in extensive global research, the iManage Knowledge Work Maturity Model™. Learn where you are on the maturity spectrum, then invest with confidence to unlock the full potential of your organization's collective intelligence.

Learn more at: maturity.imanage.com

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