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FRONTIERS 2025

What are strategic legal business leaders in the UK prioritising for progress, change, and future-proofing the firm?

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Inside tracks

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Briefing people



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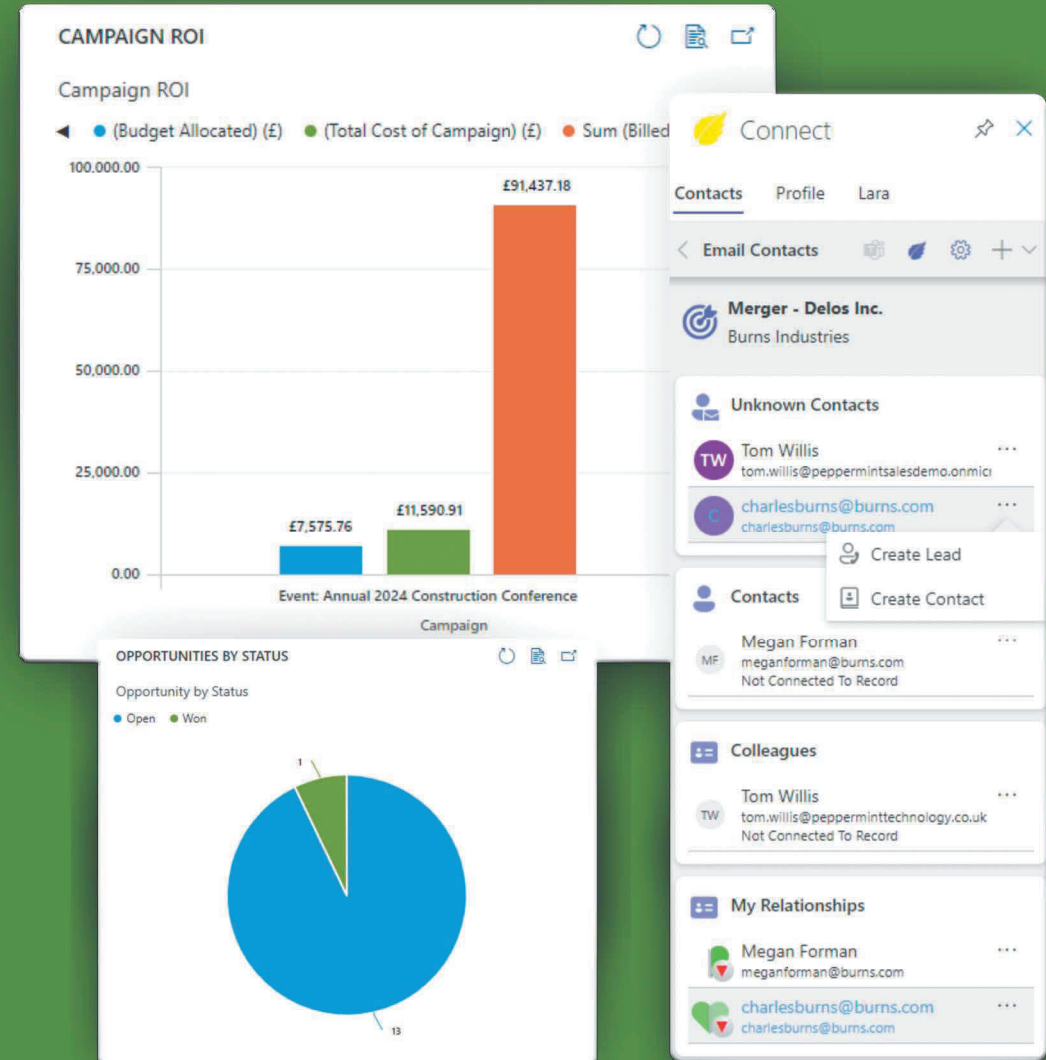
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Frontiers in focus

Executive summary

Demand for innovation resources hits a high — but firms often still struggle with some key strategic foundations for change, according to their leaders

Briefing Frontiers is the result of an annual survey of senior law firm strategic/business management leaders in a range of senior roles — CEOs, chief finance officers, chief operating officers, and other C-level leaders/directors in areas including knowledge, technology, innovation and business development. The survey for 2025 was conducted online between November 2024 and January 2025.

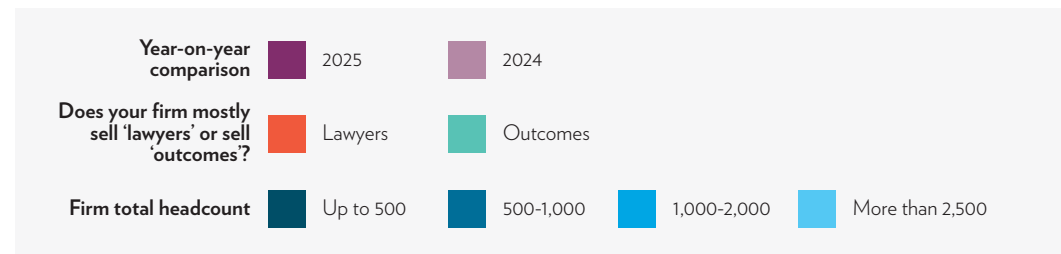
The overwhelming majority (94%) are seeing an increase in demand for their innovation teams and capabilities. A quarter who think that they ultimately provide their clients a set of ‘outcomes’ (as opposed to teams of lawyers) — see key (p5) — report it is a ‘significant increase’. Funding for such work is on the rise to match, but the top barrier they experience to any new potential business transformation project is other competing priorities

(57%) rather than cost (39%) or technical complexity (32%). There are signs that any stakeholder resistance has strongly fallen away, and poor return on investment (ROI) doesn’t appear to be putting a stop to delivery either (5%).

Almost two-thirds (64%) believe they’ll be running their business completely in the cloud by 2027. Drawn by the range of additional features regularly rolled out designed to boost productivity and cross-firm collaboration, a third also back the notion that cloud is inherently lower risk than the alternative. However, only a third believe the ability to pursue a generative artificial intelligence (genAI) strategy depends on their approach to cloud.

Over a third (36%) are confident they have a ‘firm-wide’ data strategy in place supporting other transformation plans and goals — almost half (47%) believe one will be in place by 2026. However, ▼

How to read the graphs throughout Briefing Frontiers



Strategy and business operations leaders from these UK law firms/offices completed the survey for Briefing Frontiers 2025 between November 2024 and January 2025. Thank you!

A&O Shearman	Clyde & Co	HFW	Payne Hicks Beach
Ampa	Cripps	Howard Kennedy	Penningtons Manches Cooper
Anthony Collins Solicitors	DAC Beachcroft	Irwin Mitchell	Simmons & Simmons
Arthur Cox	Dehns	Keystone Law	Stewarts
Bates Wells	Eversheds Sutherland	Linklaters	Talbots Law
Birketts	Foot Anstey	Macfarlanes	Thomson Snell & Passmore
Brodies	Forsters	McGuireWoods	Wedlake Bell
Burges Salmon	Freeths	Mills & Reeve	Weightmans
Carey Olsen	Fried Frank	Mishcon de Reya	Weil Gotshal & Manges
Charles Russell Speechlys	Gateley	Morton Fraser	WilmerHale
Clarke Willmott	Gowling WLG	MacRoberts	
	Harneys	Murgitroyd	

fewer than half of the leaders at law firms without one agree they need to take action on this immediately, and a fifth think they'll only need one within two years (the same number as purport not to know). Two-fifths say their firm has appointed a head of data to take responsibility for the area, and a third are in the process of developing (or filling) a data lake to improve the management of information captured, processed and curated across categories and multiple business systems.

Whether they already have a detailed genAI strategy, or are still in an experimentation/education phase for this, two-fifths of leaders say their firms are already piloting Microsoft Copilot to support how teams work, but only 10% say they're using it across a range of business areas — and a mere 4% report widespread use. Two-fifths have also developed a chatbot-style interface for their employees to ask business questions in natural language — 8% having something clients could use. Half of leaders report clients have “mixed views” about the use of genAI in work with them in general.

Finally, a quarter of leaders report that management is still looking to reduce the overall size of the firm's office footprint, and 30% have plans to reconfigure those spaces (whether smaller or otherwise) over the next three years. More than half (56%) expect that most of their people will still work from an office — rather than at home or another location — for an average of three days each working week. ▲



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Innovation Everywhere, all at once?

Business leaders find ongoing priority and change management is their top challenge to doing more to meet growing demand

Among other complications, the year 2025 may mean adjusting to some big changes on the world stage that came about in the last six months, including political in the UK and US of course — or perhaps just learning to live with certain aspects of uncertainty for a while longer. It remains to be seen how these developments will pan out for overall levels and confidence to invest for the future in various corners — from the fate of the economy to gains from AI, much still seems to hang in the balance — but one thing **Briefing** Frontiers 2025 can say with absolute certainty is that law firm strategy leaders did not start the year anticipating any fewer calls on their innovation capabilities or credentials.

Indeed, over one-third of leaders (36%) surveyed at the close of 2024 said they expected a ‘significant increase’ in either external or internal appetite for

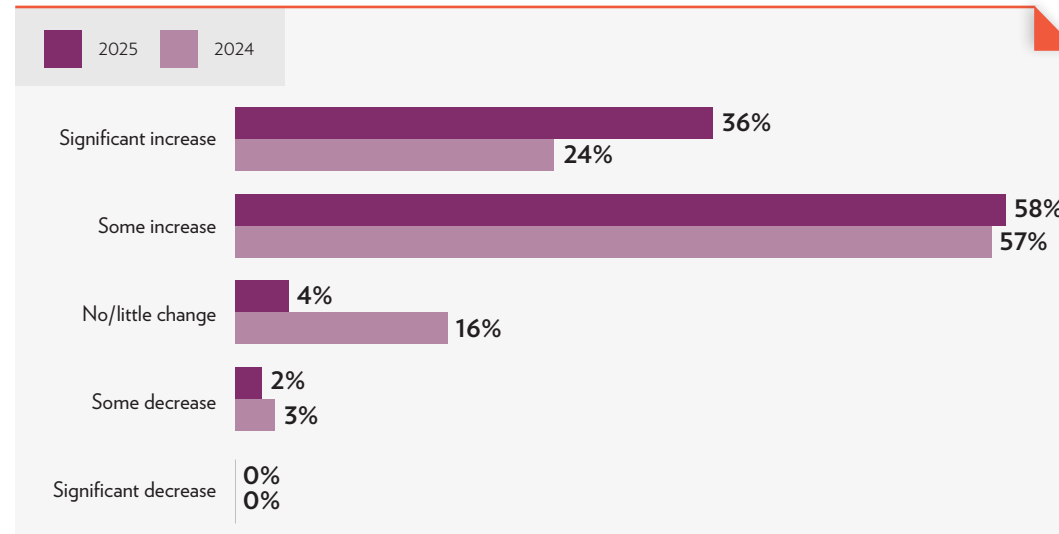
these resources — up from under one quarter (24%) reporting this in the Frontiers research that took us into 2024. A consistent 58% expect at least some increase, with a sharp drop in the proportion predicting little or no change in demand (4%).

Leaders who ultimately see their firms as more about delivering ‘outcomes’ for clients — as opposed to literal numbers of lawyers to staff matters; what one might think of as legal ‘people power’ — are even more likely to see a significant increase in demand for their work on the innovation front.

This should also be viewed in the context of the average spend leaders now report their firms putting into switching, upgrading or otherwise improving IT systems and capabilities across the board — 6% of their annual revenue — according to the **Briefing**/HSBC UK Law firm strategy and investment ▼

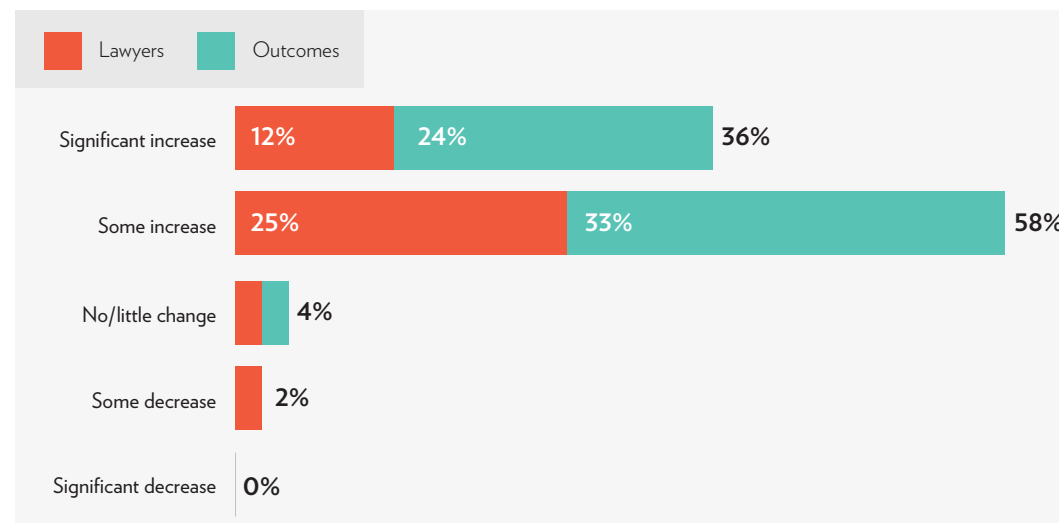
More than a third of law firm leaders see significantly more demand for their firms' innovation expertise and resources

Perception of appetite for investment in innovation/business transformation over the next 12 months



36%

of leaders anticipate significantly more demand for their innovation capabilities in the year ahead



research, published in October 2024. This annual benchmarking survey found that making decisions about investment in both cybersecurity risk management/response and client-facing solutions, such as document-based collaboration and data-sharing, were among law firm leaders' four highest-priority organisational challenges (joining salary competition and client pressure on price). More than three-quarters (77%) of leaders at firms across revenue bandings also identified "peer firms with more tech-driven business models" than their own as the force carrying the most potential for



PARTNER COMMENT

It's time to realise interconnected innovation

Elisabet Hardy, chief product officer, Elite

What does innovation mean for your firm, and how are you pursuing it? As 2025 gets underway these are more pressing questions than ever before. Most law firms are pushing hard to innovate, allocating more resources to technology and business transformation projects, according to this year's Frontiers survey findings. There's a strong sense too that investing in the right areas will pay dividends. However, that begs the question: what are the right areas on which to focus to unlock innovation?

Although every law firm has its own priorities, what tends to be fairly universal is the desire to stay ahead by leveraging the latest software developments, so that firms have access to the capabilities and tools they need to drive their business forward. That's why the momentum to move into the cloud is growing faster than ever. It's not just about improving security and

making IT easier to manage, although those are vital considerations. More and more firms understand that moving to the cloud is the first step in allowing them to harness innovative SaaS solutions as a means to open up a whole new world of possibilities, from accessing AI capabilities to drive efficiency and enhance client services, to gaining wider business benefits, such as scope for scalability as they grow.

It's important to call out that the cloud is the gateway to AI – and that matters because AI is no longer a theoretical concept. It is already making a demonstrable difference in areas like simplifying processes and automating manual tasks for firms, easing pain points as well as solving complex problems. Today this kind of advanced technology is only available via the cloud, so firms that aren't already in the cloud, or those that say they have no timeline for moving there,

risk putting themselves at a major disadvantage.

Taken together, firms embracing the cloud and AI can tap into yet another stream of innovation: data analytics. By centralising and streamlining data, firms can be confident it is correct, consistent and comprehensive, and by making it meaningful and accessible, leaders can rely on it for better-informed decision-making.

What's clear is that, although innovation can take many forms, it's increasingly interconnected. Seizing the impetus to innovate in one area can enable firms to reap rewards in other ways, creating a virtuous circle of improved processes, deeper insights, and operational best practices. So what are you waiting for? ▶

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significant disruption of a firm's current position in the market.

Correspondingly – and quite possibly as they consider how quickly to bring and bed in any number of tools promising to unlock efficiencies at work with genAI – there's also a big jump in the number reporting increasing budget available for changes considered to be innovation (80%). Again, leaders are less likely than in 2024 to be overseeing “no or little change” here, and only 2% say there's no spend specifically designated for innovation to speak of in 2025 (p10).

Morton Fraser MacRoberts is investing more in the wake of the 2023 merger that doubled the combining firms' scale. “Indeed, enabling more of this investment was one of the reasons for effecting the merger,” says CEO Chris Harte. “At the same time, however, we're also now attempting to

“We're now attempting to capture a more sophisticated picture of the total investment cost of a prospective change – for example, including the cost of people's time and running teams.”

CHRIS HARTE

CEO, MORTON FRASER MACROBERTS

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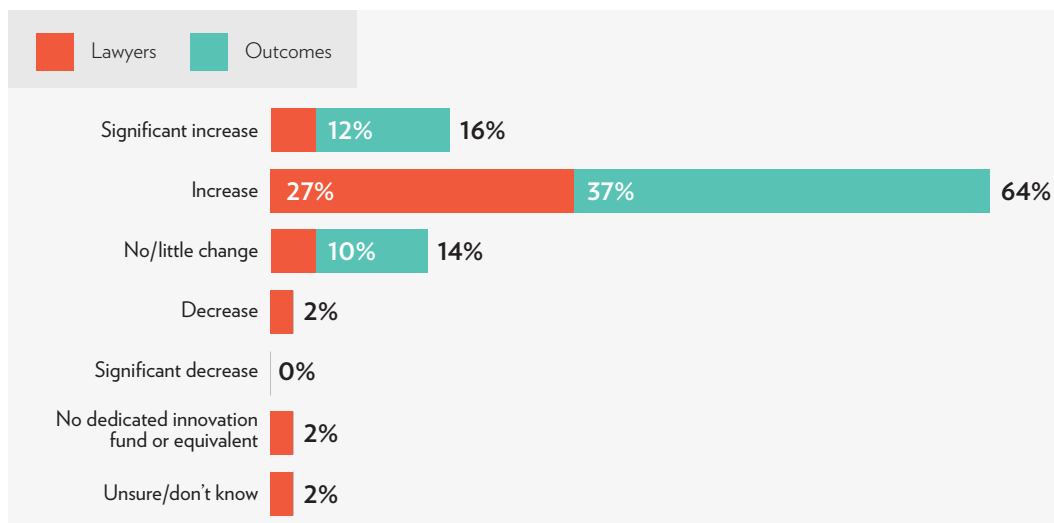
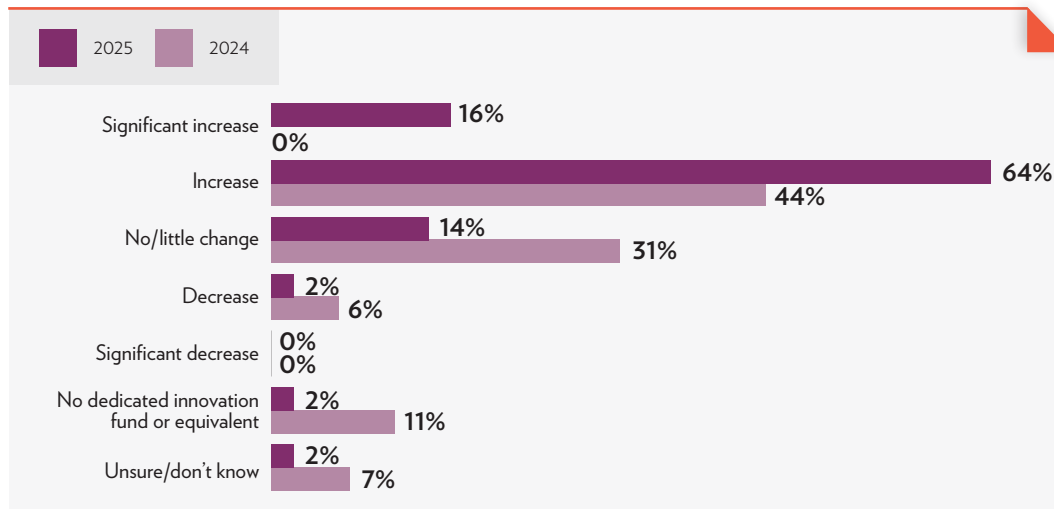
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Three-quarters of leaders say firms have increased funding for innovation teams' work and horizon-scanning

Change to innovation budgets, or equivalent dedicated IT/business transformation funds, in the last 12 months



capture a more sophisticated picture of the total investment cost of a prospective change — for example, including the cost of people's time and running teams. There's the matter of managing the bridge between the lawyer's experience at the coalface of client service and what is or isn't possible with technology. There are also lots of requests for projects and pilots from different areas of the business — and we can't do everything — so this analysis gives greater confidence that we're making better choices."

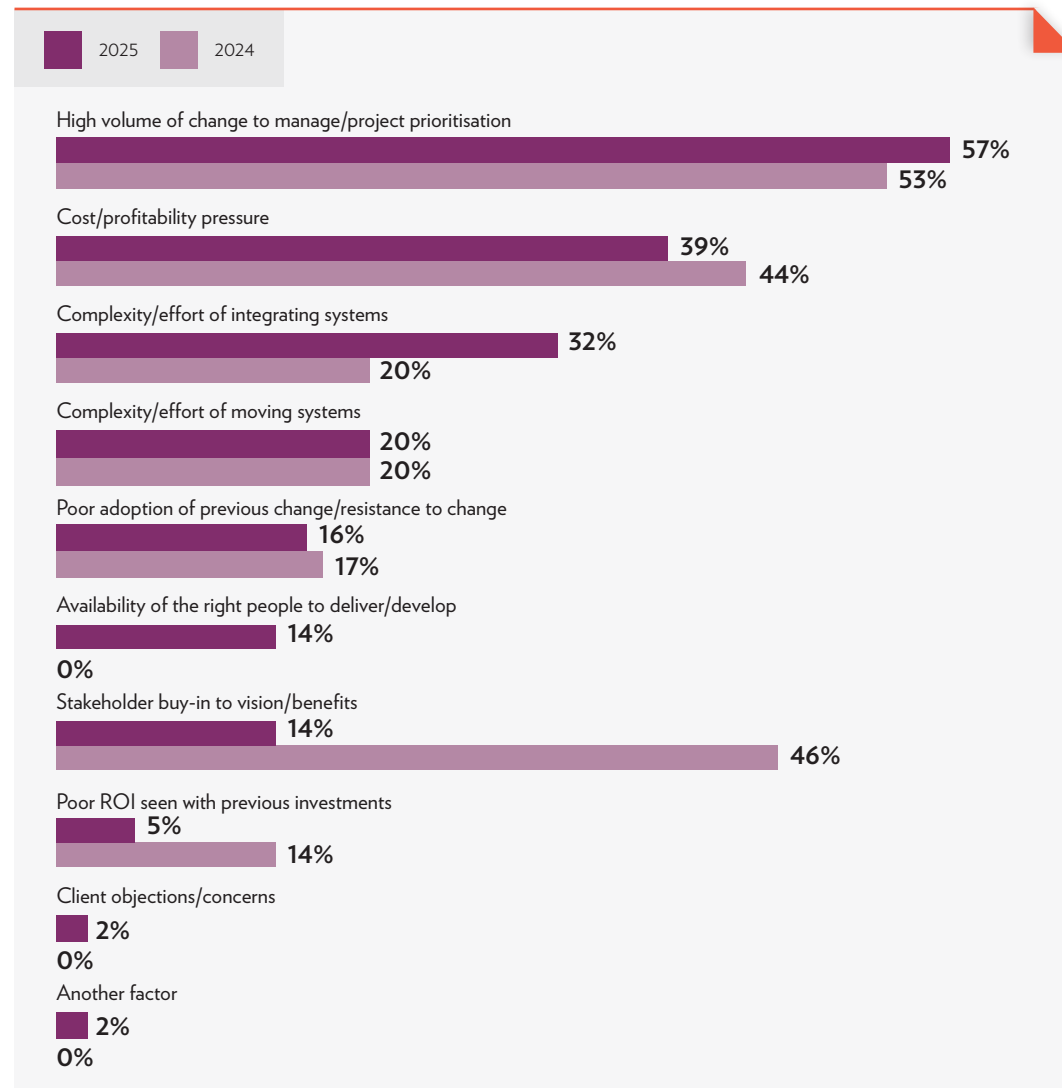
He adds: "Many firms will also be doing, and spending, more on technology without that necessarily being proprietary things or ground-breaking in terms of new delivery. A lot hinges on what's included in the packages offered by behemoth industry players."

Another thing that hasn't changed at all in the past year is that the barrier to more transformation law firm leaders are most likely to identify is the weight of competing priorities/pressures (57%) — that is, the sheer volume of change they could introduce (right). Intriguingly, there's a sharp drop in the number who identify securing the necessary stakeholder buy-in as a notable barrier — and just 5% select the dubious track record of ROI in transformation projects.

After change's selection and management, it's the cost (39%) and complexity of delivery — particularly surrounding integration (32%) — that ▼

The sheer volume of change remains top obstacle to it — and complexity of integration is a growing concern

Most common barriers or objections heard to more investment in technology and transformation



are most likely to challenge agendas.

Claire McNamara, director of knowledge and learning and a partner at Penningtons Manches Cooper, says: “Innovation at this firm is everyone in business leadership’s business, and we manage it quite an agile way, ensuring the right leaders are talking to one another effectively. Joined-up thinking is important, and it helps to have a model that has both a strategy and an operations board.”

But there’s a process to follow for introducing any new legal technology, she says. “It’s not overly onerous, but it needs to have teeth. There’s a project or product sponsor — usually a partner — a separate product owner, product scoring from the outset, and a clear emphasis and expectation this can demonstrate ROI in the foreseeable future. It’s a particularly good idea to have the right people involved in scoping any project early on — which ▼

“There’s a project or product sponsor — usually a partner — a separate product owner, product scoring from the outset, and a clear emphasis and expectation this can demonstrate ROI.”

CLAIRE MCNAMARA

DIRECTOR OF KNOWLEDGE AND LEARNING,
PENNINGTONS MANCHES COOPER



PARTNER COMMENT

Strategic agility must start with a plan

Neil Shah, head of financial services,
Board International

Our review of the **Briefing** Frontiers 2025 research clearly supports why we have taken the strategic decision to expand our global professional services footprint, continuing our committed focus in the legal services market.

A strong trend towards increased appetite for, and investment in, transformation and innovation is highlighted. This clear trend supports our view that the volume of IT-led projects across fee-generating and business-service processes continues to increase, raising the question of project fatigue and effectiveness across investments.

Our view is that data strategy needs to be embedded in all the firm's decision-making processes when investing in transformation and innovative projects, especially when they are technology led.

For Board, what is clear is that

planning needs to be at the heart of a firm's decision-making. There is the ability to understand resource availability versus business-as-usual, cashflow, funding, and which initiatives to prioritise from an ROI and feasibility perspective. These decisions must be planned considering existing IT architecture, business process and operating model. Ideally, all investments will contribute towards a collective ambition to simplify process and architecture — aligned to a planned and defined multi-year target operating and data model.

Without the above, firms will continue to see inefficiency in spending, rising operational costs and an inability to adopt and maximise the benefits of data-driven technology advances in machine learning and natural language models. This ultimately increases risk in data asset security and difficulty driving agility into commercial and

operational models. We strongly believe agility in strategic decision-making and data security will be the competitive differentiators of sustained growth, enabling successful firms to respond to the changing client needs that **Briefing** has highlighted across its publications in 2024.

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helps to avoid objections around integrations or other requirements seen as unmet later.

“Unless the impact is expected to be firm-wide, innovation is also allocated and costed to the relevant part of the business, which encourages people to think carefully about why they want what they want as it will ultimately affect their profitability.”

Nevertheless, she adds, it remains a real challenge to prove ROI: “There can be several conflicting factors. For example, perhaps there's client or internal pressure to get exploring quickly, and show you're serious, before something is necessarily developed enough to save lawyers a lot of time. Rather, you need to watch how that situation evolves over time. Then there's the question of who pays, not just for the tool — less time spent may equate to less time charged to clients, which could affect profitability. Effective pricing is needed that is value-based.”

David Aird, IT director at DAC Beachcroft, adds: “AI has a part to play in the next chapter of change, but this firm's most core focus is to manage to grow the business both internationally and profitably, rather than growing for the sake of growing — the creation of sustainable value. Operating in a very competitive part of the market means trying to optimise everything involved in the back-office — from IT to finance — for maximum possible efficiency.” ▴



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Cloud on course

Most objections evaporate

It's clear the majority of law firm leaders are running firms with a cloud strategy, and shifting the last major systems is largely only a matter of time

For many years **Briefing** has tracked leaders' views about whether law firm business systems and people are best served by running those systems in a private, public, or hybrid cloud environment. This has emerged as a clear direction in recent years — and in *Frontiers 2025*, for the first time, nobody (who knows) believes it isn't part of the firm's long-term plan to move all their 'core' systems to a cloud version eventually. Almost one third are either there already (16%) or believe they will be by 2026 (14%), and one third again expect to have done the work within two years. This is the most common timeframe expected. However, more than a quarter (28%) believe it's more likely to take the firm five years to get there — consistent with the results of this research in 2024 (right).

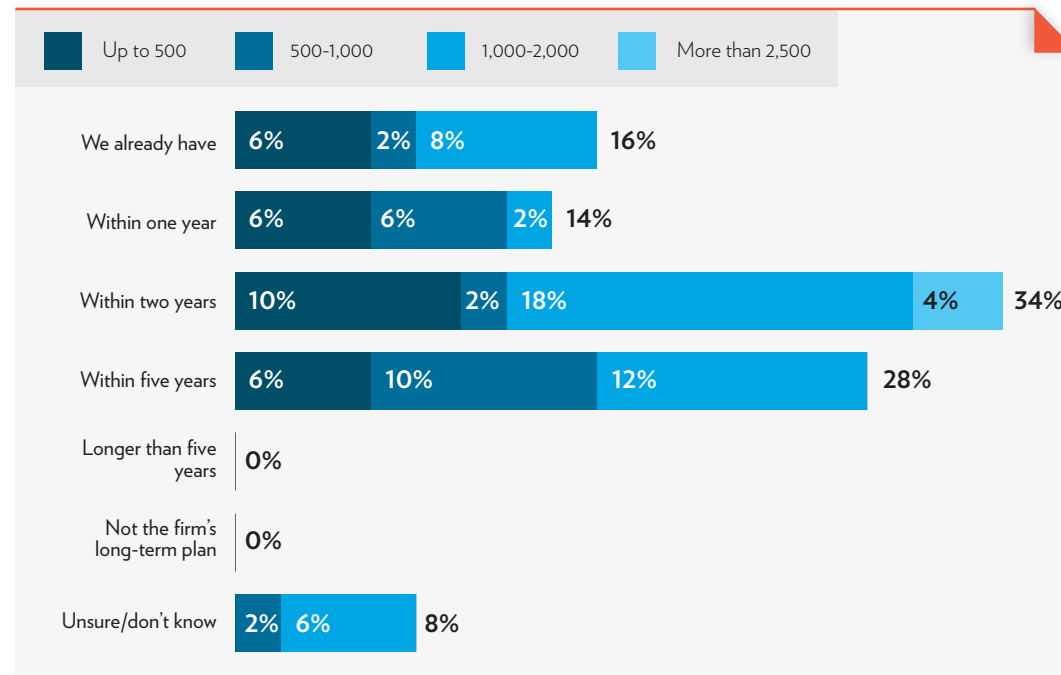
Of course, suppliers have their own reasons for

hoping firms will make the big move sooner rather than later — but two-fifths of leaders say they're most likely to be driven in this direction by the range of new features that are expected to be available in such a scenario. One third also now agreed that cloud is the lower-risk option in terms of information security — the likes of Microsoft Azure clearly having more budget and bandwidth to invest in its safeguarding than your typical legal business — while for 30% cost-effectiveness would be key. Only one fifth would still be influenced by any perceived complexity ensuring systems perform well in the context of other legacy pieces of technology — and fewer still (12%) are at all concerned how clients may view the decision (p18).

Nick Pryor, director of knowledge and innovation at Freeths, agrees that cloud is fundamentally an enabler of the opportunities within his remit. He ▼

Almost two-thirds expect all core business systems to be cloud by 2027 — including the practice management system

Timeframe for expected migration of all core business systems to the cloud, by total firm headcount



“It’s a more straightforward proposition to join products such as the DMS and PMS together if they are cloud — although firms need their data to be consistent.”

ALASTAIR MITCHELL
CHIEF OPERATING OFFICER, CRIPPS

says: “Microsoft is on a fairly aggressive rollout of new capabilities — and not just for the Copilot suite. That means there are more tools at your disposal to help people work efficiently. The unpredictability in the desktop interface creates some challenges around process design, training, and support — but cloud ultimately allows us to drive the data strategy with agility in developing a unified user experience.”

Alastair Mitchell, chief operating officer at Cripps, adds: “Cloud is absolutely a priority — everything that can go into the cloud must and will go into the cloud.” The firm’s document management system (DMS) and practice management system (PMS) are both on his project list for 2025. “It’s true that suppliers aren’t developing their on-premises products in the same way, so there’s a risk of missing out on certain functionality, and cloud is also a platform for effectively combining systems. It’s a more straightforward proposition to join products such as the DMS and PMS together if they are cloud — although firms need their data to be consistent and effectively accessed first to leverage a lot of the technology that’s available.”

At Mills & Reeve, meanwhile, the future of



PARTNER COMMENT

Cloud adoption a strategic imperative for firms in 2025

Tony Pazakis, vice president, LexisNexis InterAction+

Law firms are on the cusp of a technological transformation as they increasingly adopt cloud-based solutions to bolster productivity and client service. The results of the **Briefing** Frontiers 2025 research highlight a significant trend, as 64% of firms plan for all their core business systems to move to the cloud within the next two years. And 94% of leaders see an increased appetite for the firm to invest in business innovation. This shift underscores the growing importance of cloud technology in maintaining competitiveness in the legal sector.

Cloud adoption offers a host of advantages, which is driving accelerated adoption. The research shows 40% of respondents view new features and functionality as the key deciding factor to move to the cloud, while 33% indicate data security as their key motivator. While cloud adoption enables interesting genAI use cases, the

respondents were evenly split as to whether genAI capabilities influence a cloud adoption timeline.

Then, on a scale of 1–10, most gave their firms just a five for how

Law firms are on the cusp of a technological transformation

well the firm is connecting data flow between the different business systems to deliver on their goals for improvement. When moving core business systems to the cloud, it is increasingly important for firms to have a data strategy guiding how to deliver value through connecting the data from those disparate systems.

To transition to cloud-based technology, firms must invest in the tools and services that align with their organisational priorities.

Comprehensive training programmes are essential to equip

staff with skills needed to use cloud tools effectively. Partnering with reputable providers that understand the legal industry's unique needs can also enable growth while ensuring security and compliance requirements are met.

Shifting to cloud-based technology is not just a technological upgrade. It's a strategic decision for the firm. By embracing the cloud, firms can enhance security, improve how their data sources are integrated, and deliver innovative functionality to enable more productive and effective legal services. How will your firm's cloud adoption plan compare when it comes to adaptability and readiness? Is the firm well positioned for success and growth? ▴

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client relationship management (CRM) is one strategic consideration, and cloud is weighing in the balance. “The current system isn’t cloud-based, but with a shift in that direction we should see more agility to do some things we need to do in the business development sphere,” explains director of marketing Julie Mortimer. “The big driver is towards more visibility of the client as a whole — across Outlook and LinkedIn for example — beyond what the system already has on record.” However, the project’s high-priority status will need assessing to secure the budget needed for a big investment if the economic outlook softens, she says.

Gowling WLG IT director Shane Scott adds: “Realistically, cloud is now more or less a prerequisite — if you want to work with Microsoft Copilot, for example, any dataset needs to be in ▾

“Cloud is now more or less a prerequisite — if you want to work with Microsoft Copilot, for example, any dataset needs to be in Azure.”

SHANE SCOTT

IT DIRECTOR, GOWLING WLG



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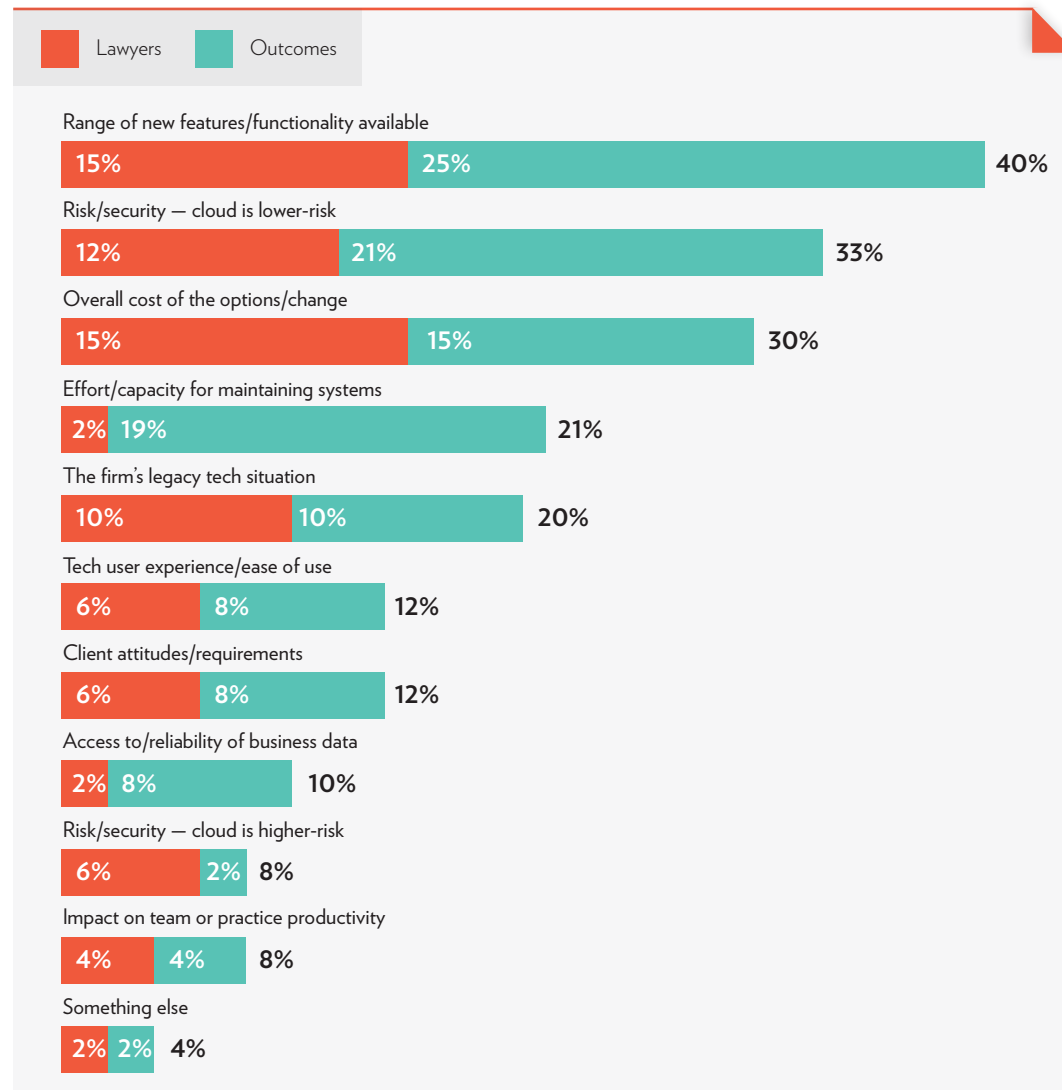


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Functionality, security and cost-effectiveness are the top three factors for leaders mapping out their approaches to cloud

The most important factors as leaders decide whether different systems are right for a cloud shift



Azure.” Indeed, his firm’s top priority from a technology standpoint over the next 18 months is to make progress deciding the future of its PMS, “primarily looking for an improved process environment and moving into the cloud to take advantage of AI”, he explains.

Aird says DAC Beachcroft currently has everything core, including DMS, PMS and CMS, in at least its own MS Azure cloud — the looming question here is whether now to complete the move to SaaS.

“Managing to leverage AI may well be a big challenge for a lot of law firms — but with our own instance we can already access our data really simply, all linked to OpenAI.

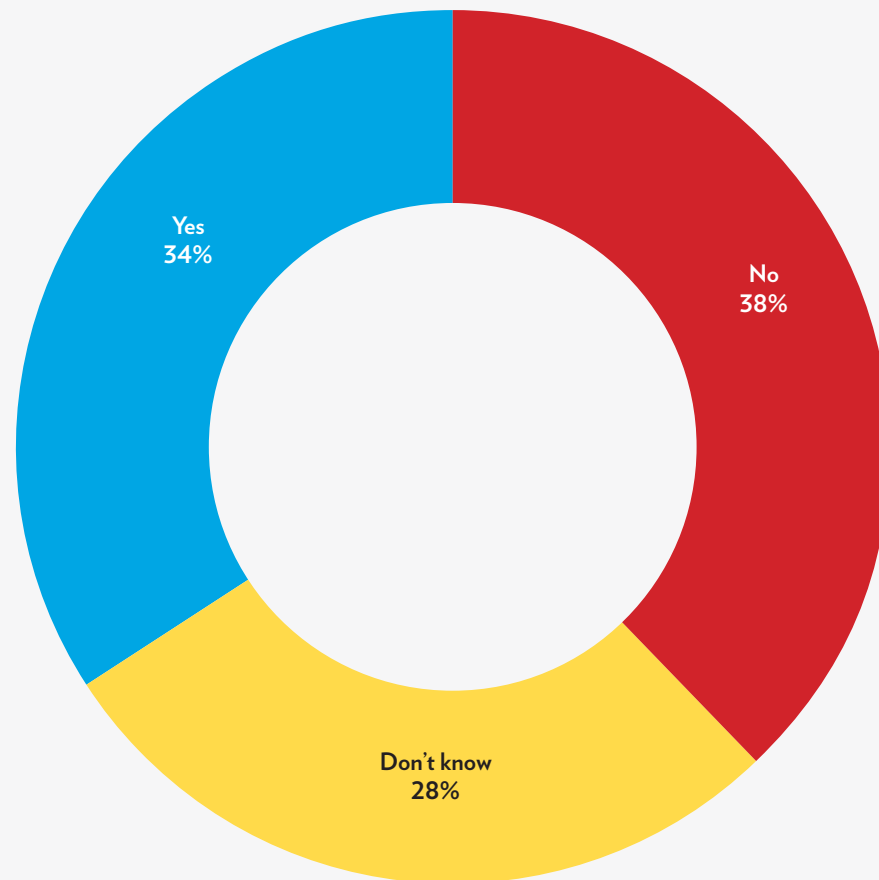
“Law firms had a few years of persuading clients it’s a good move so that we can concentrate on the ▼

“Law firms had a few years of persuading clients it’s a good move so that we can concentrate on the truly core parts of running a legal business that differentiate — like investment in transformation.”

DAVID AIRD
IT DIRECTOR, DAC BEACHCROFT

Leaders are divided on a link between cloud status and genAI opportunity

Does your firm's ability to involve AI/genAI in process as it may want depend on its strategy/timeline for cloud adoption?



truly core parts of running a legal business that differentiate — like investment in transformation.

“We don’t particularly want to be rebooting servers ourselves each night we patch them. The only point that would potentially prevent me, where I waver, is the financial case. Days when a public cloud deal was more cost-effective than running it for yourself are gone — instead you’re now paying for the privilege.” ▲

Which system is next on the list for firms with a clear cloud strategy?

- Case management — “access anywhere, and remove the hosting cost”
- Client dashboard
- Client onboarding
- Client relationship management — “for global accessibility”; “security and agility”
- Document management system — “lack of ongoing support for on-premises systems”
- Expense management
- Finance system — “changing at this stage means cloud is obviously the right approach”
- HR system
- Intranet
- Off-the-shelf practice management system “with cloud configuration in-built natively”
- Power Automate
- Practice management system — “prior solution is end of life”; “one of few systems not already on the cloud”
- Telephony

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The data today

Strategy work still on to-do list

Fewer leaders than in 2024 now believe their firm already has a reliable business-wide data strategy in place — but it's certainly a priority area of work in progress

If firms do need to act on their data repositories to deliver more joined-up working and other improvements, is there an overarching strategy for that? Do they know what specifically needs to change, and the steps required to go about it?

In 2025 just over a third of leaders report that they could present us with an official data strategy for the firm — considerably fewer than said so in 2024 (61%). What has become clearer is that the truth for most is it's a work in progress — clearly a highly complex undertaking with multiple overlapping strands — and the result can probably also be viewed in context of managing the increasing volume of change across the firm (p22).

Certainly, fewer leaders today indicate there is no data strategy for the firm at all (14%) — and almost half of those without one believe it's an

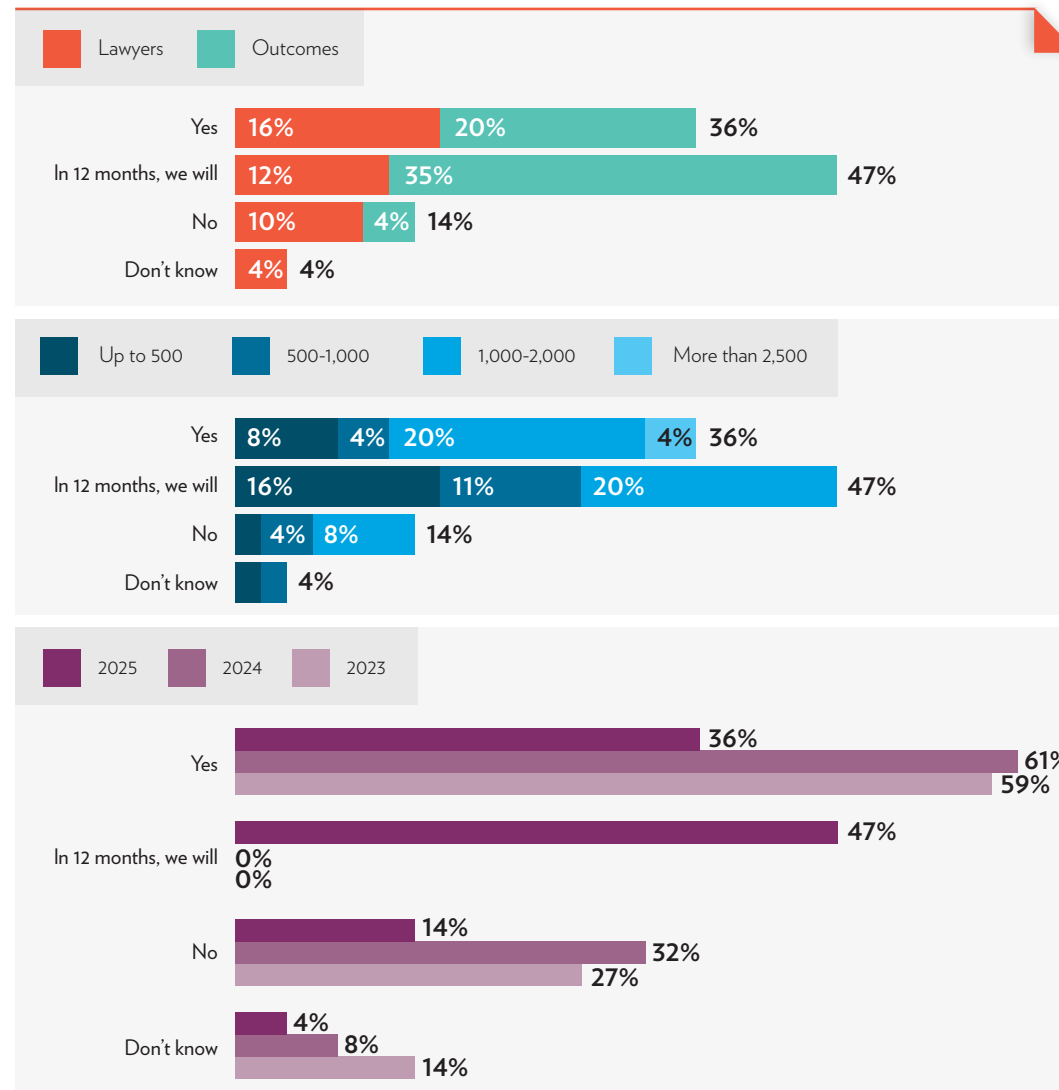
immediate priority for consideration or investment (p23). Just over a fifth feel comfortable giving themselves two years, and only one in 10 in this group believe it's unnecessary (although a further fifth are unsure).

A third also say their firm either already has — or is currently working on — a data lake to enable movement in this direction, a small increase on 30% saying so in 2024 (p25). However, a quarter indicate they don't know whether this is necessary to render the data stored in their various systems more usable or valuable.

Leaders acknowledge they need to do something about data management as an organisational challenge. The average score they award for the effective connectedness of their business data generally is five out of 10 — which encompasses a range between outliers one and nine. ▼

Four-fifths of leaders believe their firm will have established a data strategy by the end of 2025

Leaders who can identify a clear, documented, or agreed on, data strategy for the firm



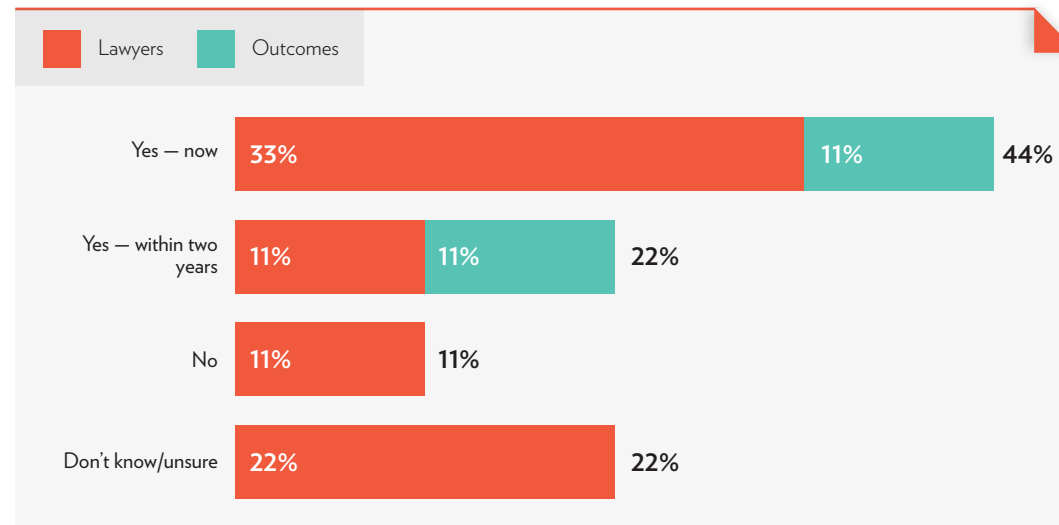
83%

of leaders say there is either already a firm-wide data strategy or there will be one within the year

McNamara at Penningtons Manches Cooper believes this is another example of a pillar of strategy where joined up working between the business units themselves is key. “The challenges are discussed a great deal. There are regular meetings between information governance and security, with data-mapping exercises to establish entry points and who needs to do what,” she explains. “Practice teams and knowledge lawyers also need to answer questions about where data is held to build this picture.” However, she adds that the number of areas involved in the work can also present something of a double-edged sword for decision-making. “The different departments of a ▼

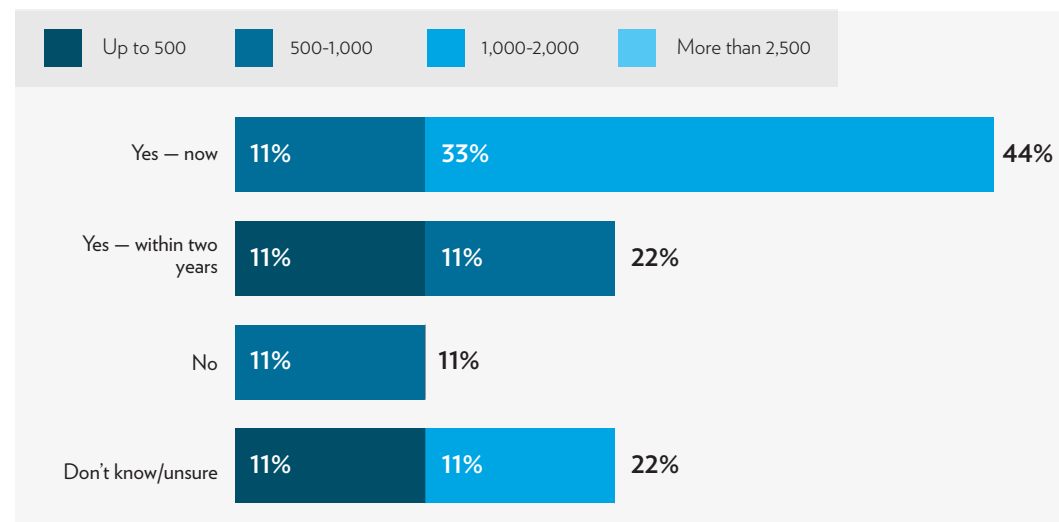
Almost half of leaders without a data strategy in place believe this is an immediate investment priority

If not already in place, does your firm need a joined-up, business-wide data strategy?



66%

of leaders at law firms without a clear data strategy say it needs to have one within two years



firm will come from different angles and have different requirements, which makes establishing a single view quite a feat. At the same time, it isn't one person's job."

Moreover, the systems themselves come with different approaches to areas such as tagging and governance — but decision-making around renewals, upgrades and potential cloud migration can focus minds, she says, as does the need to make good progress with tools such as Microsoft Power BI and crystallising use cases for genAI (more on which later).

Scott at Gowling WLG adds: "By the standard of other sectors, a truly transformational data



PARTNER COMMENT

The path to growth: Embrace cloud and data strategy

Gary Young, CEO, Peppermint Technology

Law firms today are embracing transformation at an unprecedented pace, with a clear focus on growth, business transformation and operational efficiency. This year's research shows leaders are not only expressing a heightened appetite for investment in this area, but are also backing this with increased budgets — an encouraging sign of commitment to long-term growth and adaptability.

A notable finding from the survey is the growing momentum among firms to transition their core systems to the cloud. While many are still in the process of this transformation, two-thirds expect to complete it within the next two years. This shows that cloud transition is no longer a nice-to-have but rather a necessity.

While the feelings of respondent firms on use of genAI are still mixed, almost 40% are currently piloting Microsoft Copilot, with many

indicating its use for internal questions and research. Like cloud technology, it's only a matter of time until genAI becomes a standard operating practice for firms, playing a key role in delivering exceptional and competitive service.

Another intriguing finding is that respondents rate their current data flow and connectedness between the firm's different business systems as five out of 10, indicating substantial room for improvement. Having a clear data strategy and an IT platform that securely supports data quality and connectivity is crucial to successfully creating a client-centric view and leveraging the power of genAI.

Peppermint's Microsoft-based modular CX365 platform is uniquely positioned to support the evolution to cloud and use of genAI, offering the scalability and flexibility law firms need to tackle this transformation head on at the pace that's right for them. Providing

a unified view of client information through familiar Microsoft interfaces, our solutions support operational efficiency and strategic decision-making.

Overall, this year's research shows an eagerness to use technology for growth and differentiation in the legal world, underscoring the increased need for legal software solutions capable of supporting complex data ecosystems. As the legal profession increasingly recognises the value of cloud initiatives, genAI and data strategies, we're excited to be part of the evolving technology landscape supporting these changes. ▲

Learn more at:
pepperminttechnology.com



strategy would mean a firm with the ability to serve somebody something they needed within 30 seconds. The challenge most face is the matrix of different applications capturing the data — increasing subscriptions for tools confined to individual practice areas, for example. The proliferation makes it incredibly challenging to keep track, before you even begin to put it into a unified source for classification and consistent taxonomy.”

A large plc in a firm's client base could easily house half the number of applications as a law firm, he says, and that means there's potential to be more productive with the data they hold. “An HR system with a directory for matching skills to work might have the capability to harness some AI for more cost-effective resource planning — but that is a ▼

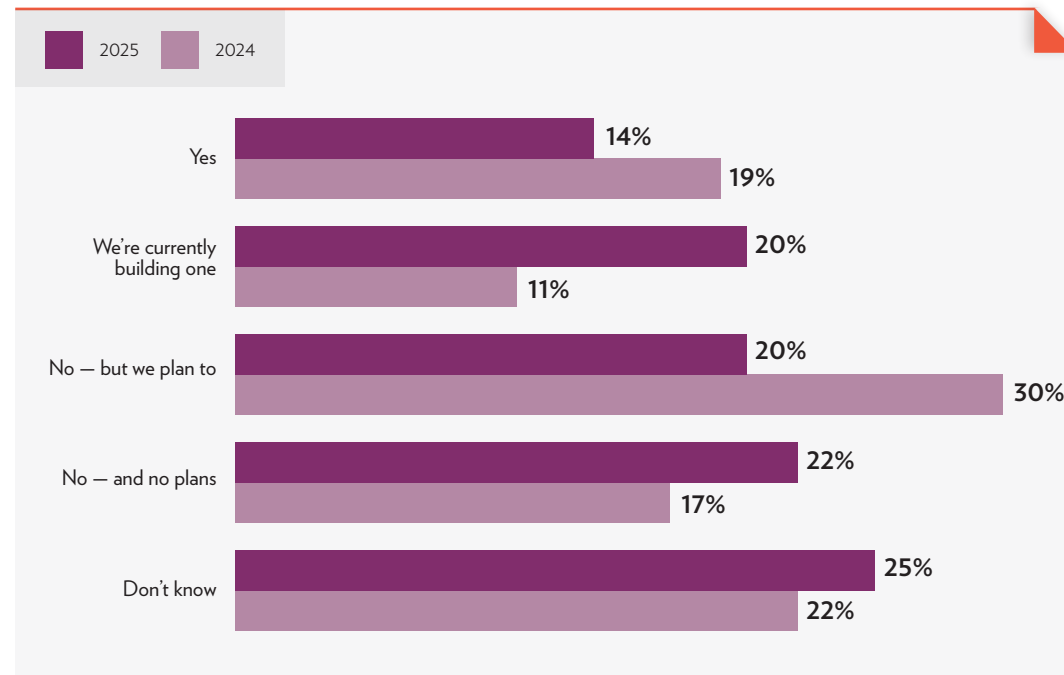
“A truly transformational data strategy would mean a firm with the ability to serve somebody something within 30 seconds. The challenge most face is the matrix of different applications capturing the data.”

SHANE SCOTT

IT DIRECTOR, GOWLING WLG

A third of leaders say their firm is already investing in a data lake to improve data management

Has the firm created a data lake within the last 12 months?



5/10

The average score strategy leaders award the firm for current connectedness and visibility of data across business systems

seriously data-hungry business. It relies on continually feeding in accurate information about availability to ensure it's there when you want to allocate a particular job."

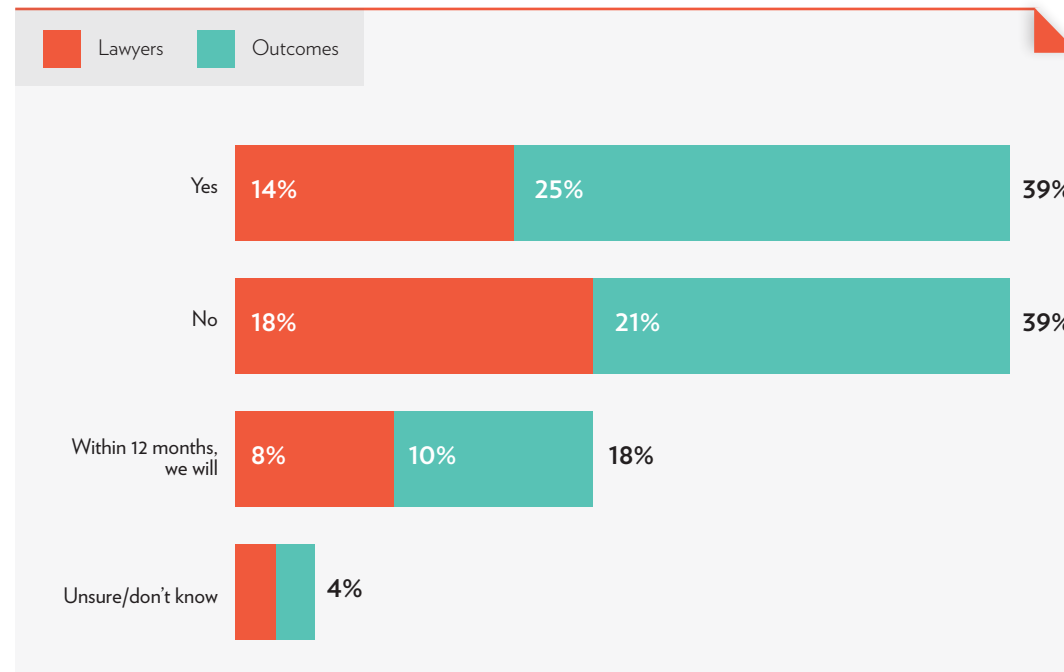
Andrew Keith, chief operating officer at Anthony Collins, also highlights the challenge of a typically sprawling legal technology stack to navigate. "Law firms' systems are frequently implemented, adjusted and effectively stitched together with 'middleware' to populate as necessary — whereas what you need is to build foundations like common data-entry systems that feed one another to satisfy a single source of truth."

It's a live discussion in the boardroom; one his firm is taking steps to address, ahead of the planning and investment cycle, before planning data flows between the systems involved. There's also a case for insisting on a more focused data-cleansing regime, he adds, as such activities tend to occur only as an adjunct to other business projects.

As well as investing in data analysts, law firm Birketts is one that has recently appointed a full-time data lead, says head of knowledge management Marcos Toffanello. "There's the risk and compliance aspect — such as maintenance, anonymisation and deletion strategies — but the data management group is also now busy cataloguing and categorising our information into what are known as data assets. This is with an end to leveraging this data to provide better outcomes ▼

Almost three-fifths of leaders say the firm has appointed a leader for data as a business area, or will by the end of 2025

Does the firm have a chief data officer or equivalent role?



for our clients with adoption of tools such as interactive dashboards and data reporting.

“Clients often want their own data, and insight into how we’ve worked with them, presented — when they can find the time to consider it — and we’re also busy building a new data lake for the systems to draw on.

“At the same time there’s a big systems review ongoing, and cloud is an enabler to unlock another level of access to data. With API links it’s easier to move between finance, document management and CRM systems.” Birketts has already made the cloud move for documents, its “biggest data repository”, and Toffanello anticipates new opportunities in interconnectivity to flow as a result.

Pryor at Freeths adds: “Everything in the collaboration space is some version of a data transaction between parties. There are lots of opportunities to explore how we surface data in a client-facing context, and that is conditional on a coherent data strategy. There’s also opportunity for improvement in the other direction — reducing friction as data is ingested from clients during matter inception and then managed as part of our internal processes. For example, we can provide visibility of progress, use tools to create customised client experiences for instructions, and enable collaborative co-authoring in some areas.”

Harte at Morton Fraser MacRoberts echoes several with the sense that one of the biggest data ▼



PARTNER COMMENT

AI can't deliver unless firms deal with data disconnects

Andrew Lindsay, general manager, LexisNexis Enterprise Solutions

The year 2025 is a pivotal one for proving the value of AI investments. After freely spending on AI in 2024, it's clear there is pressure to demonstrate tangible business benefits. This year in particular, business leaders and organisations will be held accountable for the returns their investment in AI delivers.

A strong data strategy must underpin AI for organisations to successfully deploy and achieve a healthy ROI from their AI initiatives. However, not only are organisations (nearly 66%) investing in AI without a proper data strategy in place, there is also confusion and a lack of understanding about what constitutes a data strategy.

From the report, it is apparent many organisations claim to have a data strategy, but don't know what a data lake is, or even where data is stored. This calls into question their grasp of the subject. A data lake is

essentially the 'end' of a data strategy — the common platform where an organisation puts all its data from different sources together to enable a centralised view of the information. We can see that over

AI initiatives are at risk of falling short of expectations in 2025

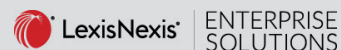
80% of respondents claim they either have a documented and agreed-on data strategy for their firm, or will have one within 12 months. In comparison, only 34% either have a data lake today or are building one, and 47% have no plans, or are unsure if they will have one. These numbers don't stack up.

Likewise, merely having the role of chief data officer (as claimed by 39% of the respondents) doesn't necessarily mean the organisation

has, or will have, an effective data strategy. One can draw parallels to GDPR officer roles, which have proved to be tick-box assignments in many firms to help comply with the requirements.

All these highly noticeable disconnects indicate wider issues around data management maturity. In the absence of robust data assimilation, curation and ongoing management, organisations will struggle to prove AI's value to the business. These solutions need access to clean and organised data. A robust data strategy is an imperative and foundational requirement, without which AI initiatives are at risk of falling short of expectations in 2025. ▀

Learn more at:
lexisnexis-es.co.uk



challenges all firms might face in the future is simply the ever-mounting volume of it. Ramping up to meet demand via cloud will only add to that. He says: "The typical transactional file today involves far more electronic data than it did 10 years ago — and its destruction is much more complex than when it was physical.

"There is growing risk for law firms in areas such as handling subject access requests, and you need to be able to reassure clients that any data strategy is such you're retaining and dealing with data in the appropriate way — while also supporting clients in terms of data held about their own customers." ▀

"There are lots of opportunities to explore how we surface data in a client-facing context, and that is conditional on a coherent data strategy."

NICK PRYOR

DIRECTOR OF KNOWLEDGE AND INNOVATION, FREETHS

Intelligence gathering

Are you genAI ready?

Over one in ten leaders say their firm is already regularly working with Microsoft Copilot across a fair range of business areas, most are at least piloting the experience, with a fifth still actively considering one

The delivery of a potential rival to ChatGPT, DeepSeek, took plenty in the transformation business by surprise at the top of 2025 — but firms are continuing the work of testing the efficiencies genAI could offer their business processes and models. At the end of 2024 there was a sense that, after a run of innovation experimentation and education initiatives to establish a confidently curious mindset, this could be the year promising use cases spread out of small-scale pockets within firms and build some serious momentum through wider adoption.

In the **Briefing**/HSBC UK Law firm strategy and investment research 2024/25, over half of leaders surveyed envisaged genAI both summarising information within legal workflows (55%) and with a role in delivering some outcomes for clients (57%) in 2025. That's despite half also identifying

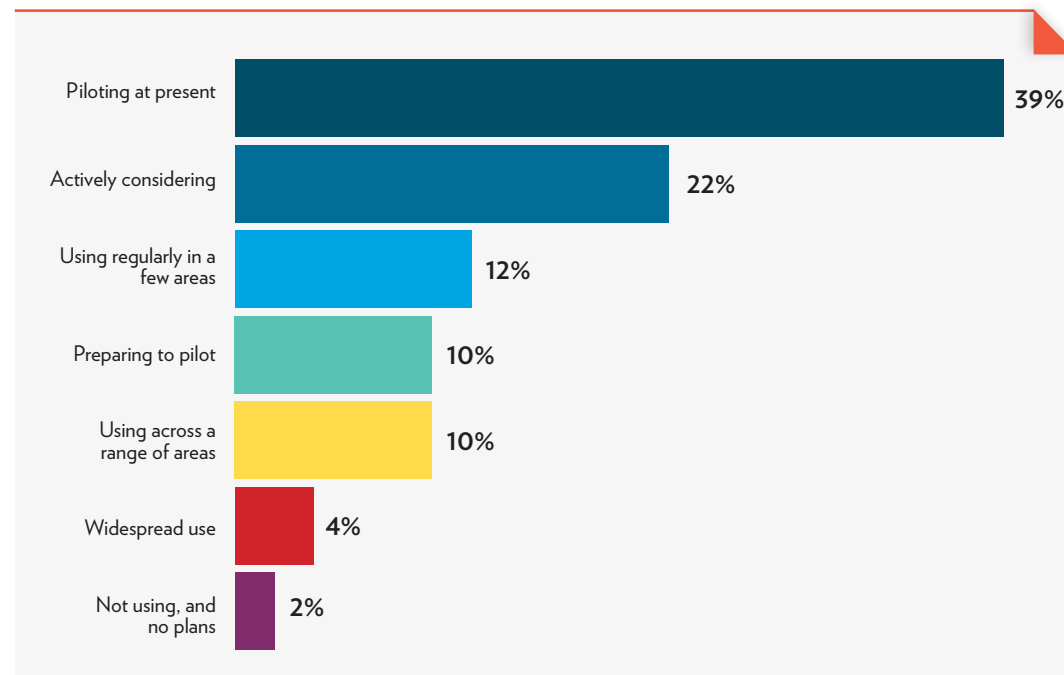
questions about 'accuracy/quality' as the highest barrier to doing more or making strategic business decisions about genAI — which came significantly ahead of security concerns (29%) or committing the necessary resource to the case (34%).

In January 2025, Macfarlanes was one of the first of the year to announce a new move in the space — working with Harvey as the genAI basis of its document and contract data analysis solution Amplify, which is now available for clients to buy.

Scott at Gowling WLG says: "Having come through so much AI hype over the last decade, we're all still in a period of discovery but perhaps just entering the enlightenment. It's such an active area in the legal market now, with so many startups, and it takes a lot of time to monitor. The two most critical things are understanding exactly what's out there and how to maximise the value of your ▼

Two-fifths of leaders say the firm is piloting Microsoft Copilot today — with over a quarter already using it regularly in a few or several areas

Law firms' overall levels of adoption and use of Microsoft Copilot



12%

of leaders say people at the firm are using Microsoft Copilot regularly in just a few areas

Firms with no plans, or limited use: what's the biggest barrier to introducing or increasing your adoption of Microsoft Copilot?

- Control over documents/confidentiality
- Cost and resource time
- Demonstrable ROI/cost-benefit is not strong
- IT expertise
- Licensing cost
- Tech stack
- User commitment to change.

knowledge assets as part of any AI strategy.”

In the **Briefing**/HSBC UK research it was suggested investment in Microsoft Copilot is likely to have the biggest impact in the nearest term — given the tech giant’s clear dominance over how firms already go about their work. Responding to Frontiers at the end of 2024, almost two-fifths (39%) of firm leaders then said they were already piloting the toolset, with one in 10 preparing to do so — the same proportion as had already deployed it in a “range of areas”. Just over a fifth (22%) were then “actively considering” it. Only 4% were



PARTNER COMMENT

AI law firms and legal professionals can trust

Lisa Erickson, VP of product AI and cloud transformation and
Alok Abhishek, director of product management, Aderant

As a leader driving AI innovation across the legal industry, Aderant has implemented a multifaceted approach to building AI — giving legal professionals their very own superpower to bolster profitability, efficiency, and compliance.

• **AI across Aderant's product suite:** MADDI, Aderant's powerful AI virtual associate, is more than a chatbot — it's a game-changer. Whether optimising financial health, cashflow, profitability, operational efficiency, decision intelligence and compliance, or the seamless generation of time entries, this powerful AI solution enhances multiple processes across the business of law.

• **Powerful data and extensive training:** Aderant's approach to building AI encompasses four key components — a robust data strategy, the development and implementation of advanced AI

models, the measurement of critical performance and quality KPIs, and a commitment to continuous improvement. This holistic approach ensures every aspect of AI integration is meticulously planned and executed, driving efficiency, productivity, and continuous innovation.

• **Security and privacy:** At Aderant we are committed to upholding the highest standards of data privacy and protection in the development of AI capabilities. We do not use any confidential, intellectual property, personally identifiable, or sensitive information for machine learning model training. We leverage only aggregated, synthetic, or customer-partnered data, all processed within stringent guardrails to ensure data security and privacy.

Our data strategy emphasises rigorous quality management, including automated checks, masking, anonymisation, and

filtering, ensuring security and compliance.

• **Ethical responsibility:** AI is accelerating how firms automate complex tasks, uncover actionable insights, and make strategic decisions. But AI must be built with a human-centric approach that empowers legal professionals because they are the driving force of every law firm. The success of AI across the legal industry lies in an approach where technology amplifies human capabilities.

Aderant is committed to empowering law firms with AI technology that enables them to navigate this transformative era with confidence. The future of legal tech is not just promising, it's here. It's important that this technology is built with the evolving needs of law firms and legal professionals in mind. ▶

Learn more at: aderant.com

Aderant

already seeing widespread use, but almost nobody said it wasn't being considered in any way.

Aird at DAC Beachcroft says: "Copilot can give you great results on time savings in some areas, and it improves all the time, but it still presents more help for people with certain roles and responsibilities than for others."

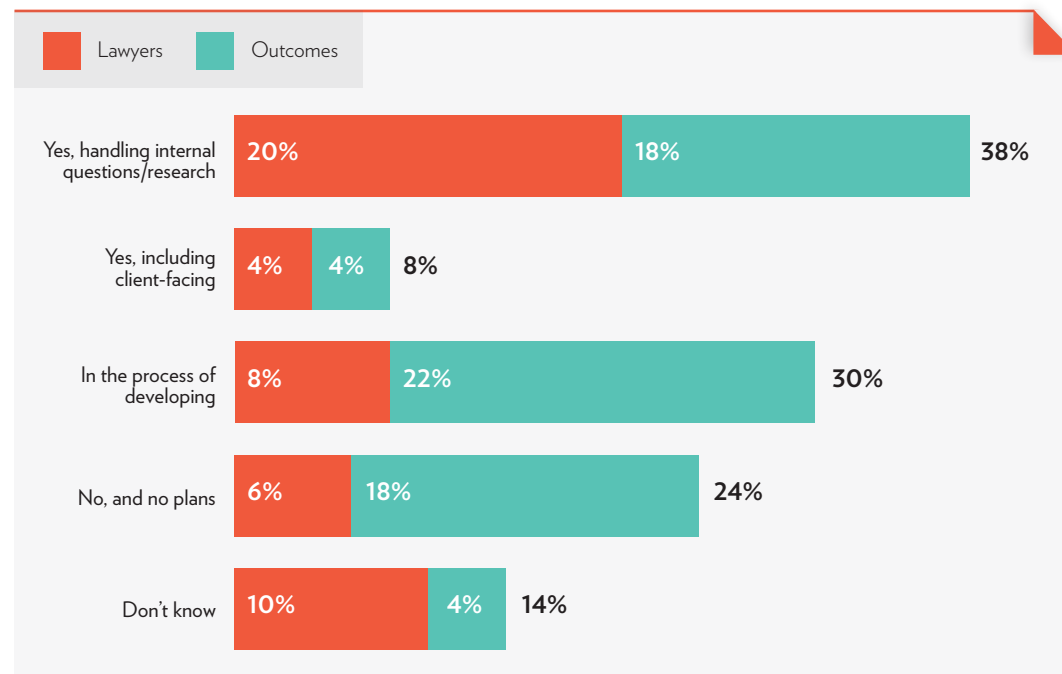
Scott continues: "We've run a structured pilot across the whole business — lawyers and business services — and identified seven use cases, rotating teams around them to see which emerged as the best options for all." These have included document summarisation and analysis, due diligence, discovery, and administrative support along the lines of automating meeting summaries and more ▼

"Copilot can give you great results on time savings in some areas, and it improves all the time, but it still presents more help for people with certain roles and responsibilities than for others."

DAVID AIRD
IT DIRECTOR, DAC BEACHCROFT

Almost two-fifths of leaders say the firm has a chatbot-style tool for answering internal questions

Law firms that have applied genAI/LLMs for chatbot-style interfaces



51%

of law firm strategy leaders still identify concerns about accuracy or quality as a barrier/challenge to more use of genAI

Briefing/HSBC UK Law firm strategy and investment survey 2024-2025. October 2024

efficient email management.

Pryor at Freeths says: “We’re certainly leaning into Copilot — a significant percentage of the firm now have it — and what strikes me most is the distribution of adoption. From all the dashboards, as well as collaboration and workshops, it’s impossible to see strong trends that any one group is using it more or less than others. People also come up with use cases I’d never have imagined based on how they manage their documents or complete other tasks in their day to day.”

The firm has also licenced some research AI capabilities, he says, but now sees a need for wider “context windows” to deploy large language models (LLMs) on large-scale legal exercises like due diligence or verification with real confidence.

Meanwhile, plenty of firms have also developed a chatbot-style offering, their leaders say, although these are more likely to be triaging a range of internal requests (38%) than providing clients information (8%). Almost one third (30%) of firms without are in the process of developing such a tool as part of their transformation efforts.

Scott says Gowling WLG specifically focused its chatbot — developed on ChatGPT4 — on data sources such as HR and finance policies, “support areas that receive a high volume of calls”. The number of documents involved is also relatively ▼



▲ PARTNER COMMENT

Cloud and AI: Driving the next level of transformation

Jill Schornack, vice president of product, NetDocuments

Law firms are increasingly recognising the urgency of embracing transformative technologies, with innovation budgets growing to meet new demands. The landscape is clear: what was once considered advanced — like cloud-based solutions — is now a baseline expectation. To truly differentiate, firms must focus on AI and workflow automation as the pillars of an intelligent document management system (DMS).

In this era of rapid technological progress, firms that hesitate to evolve risk falling behind. Cloud adoption is an essential step to stay competitive. It's no surprise that more than two-thirds expect their core business systems to be hosted in public or private cloud environments within two years.

From a document management perspective, the move to dedicated cloud platforms offers unmatched efficiency for managing, sharing

and collaborating. As the research indicates, law firms increasingly see the cloud as not just secure but also a low-risk solution for maintaining confidentiality.

With the added benefits of reduced maintenance and greater flexibility, cloud enables IT teams and legal professionals alike to refocus on what truly matters — their exceptional client service.

AI is now at the centre of the conversation about law firm productivity and efficiency. As the research highlights, there is significant interest in generative AI and large language models to create conversational agentic experiences. The ability to use natural language to locate information, answer questions, draft responses and create summaries, is transforming how firms interact with their documents.

However, firms must proceed with caution. Using isolated AI tools that require sensitive data to be

moved out of centralised, secure systems of record introduces significant security risks and vulnerabilities. It's smarter to bring AI directly to your content within the DMS, leveraging trusted systems you already rely on. Partnering with a DMS vendor that seamlessly integrates AI solutions ensures both security and efficiency.

The future of legal tech lies in integrated solutions that unite cloud, AI and automation. These tools enable smarter workflows, enhanced security, and the efficiency that clients and teams demand. By advancing to intelligent systems, law firms can drive innovation, deliver greater client value, and build a future-ready organisation. ▲

Learn more at:
netdocuments.com

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finite — the reason it hasn't gone down this route for the IT helpdesk (instead using ServiceNow to digest the history of requests there). “We're also exploring whether we can automate some of the bidding process, using a library of responses to produce a first draft of a pitch,” he says.

Mills & Reeve has also pursued the last of these ideas, says Mortimer: “Running AI across the data, in addition to sweeping in others such as directories, potentially gives a better base of information to extract what you need for credentials. But that brings us back to the critical issue of data quality — how to structure and collect it appropriately to use it for something with any robustness and validity.” ▼

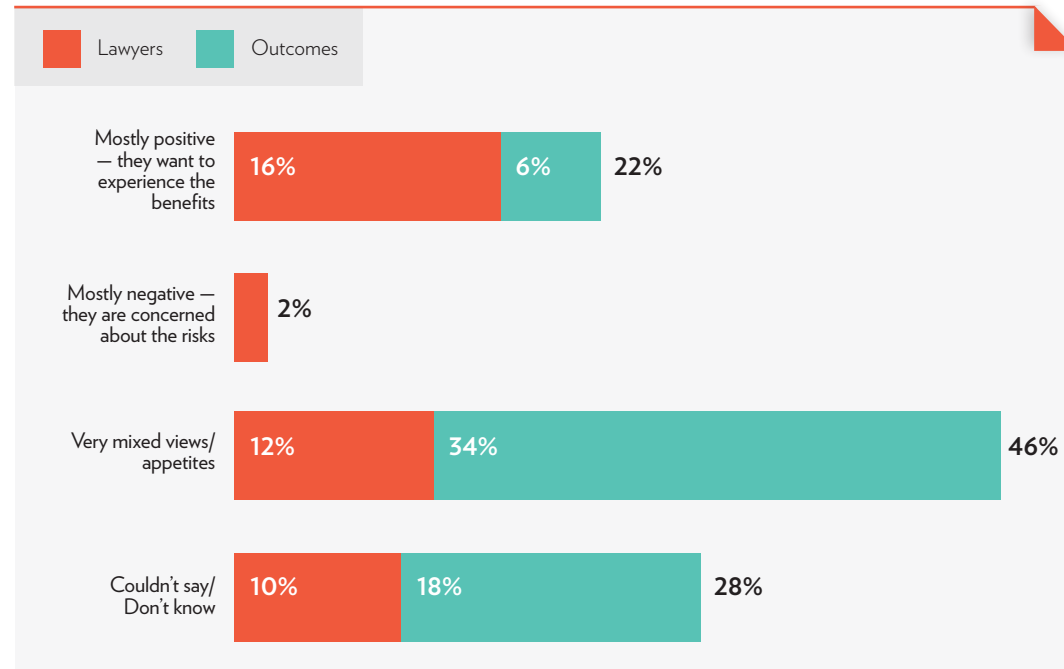
“Even if the user interface is chat, we're now trying to move past the chatbot paradigm by building additional workflow in and around it.”

NICK PRYOR

DIRECTOR OF KNOWLEDGE AND INNOVATION,
FREETHS

A fifth of leaders believe clients have a largely positive view of the firm using genAI in work for them. Almost half see a wide range of views

Perceptions of client attitudes to using genAI in processes that result in work product for them



57%

of leaders expect genAI to be used in the production or delivery of legal work for clients by the end of 2025

Briefing/HSBC UK Law firm strategy and investment survey 2024-2025. October 2024

Mills & Reeve also sees a potential role for a chatbot on one of its consumer-facing sites. “You could quite easily see how it might help with some straightforward questions, we can already see there’s a degree of predictability about them, but there’s significant work to do on the routes, behind the scenes, to reach a point where something is sophisticated enough to be public facing.”

And Anthony Collins is considering a client-facing example — seen as in line with its mission statement of being first and foremost a “social purpose” firm.

Andrew Keith explains: “The idea would be to support people during a potentially very confusing period of their lives, and help them to make the right decisions about which way to turn. It might bring some business to us, but it is more important to us to show what technology might do to uphold the firm’s social purpose values of prioritising helping people to access justice in a digital and transparent way.”

Pryor at Freeths adds: “Even if the user interface is chat, we’re now trying to move past the chatbot paradigm by building additional workflow in and around it. It then becomes less question and answer, and more what some are describing as an agentic experience.”

A special workplace

Have firms found the balance?

Over half of leaders predict most of their people will now work from an office location for three days each week, on average — and they're investing to make that a more attractive and purposeful proposition

Finally, as operations grow, leases expire, and cost base continues to shift — and hybrid work remains the dominant mode — how does the future of your law firm office look in 2025?

Harte at Morton Fraser MacRoberts says: “Post merger, it has certainly been a necessary stream of work to bring our people together and build up the relationships. A firm creates value for clients by leveraging its shared knowledge, and a physical office has an important role to play in that process.”

In the case of his own firm this means a new space in Foster + Partners-designed Haymarket Square in Edinburgh. It opened in early 2024 and brings teams from Glasgow and Edinburgh (480 people) together under one roof — at least some of the time — he says it's the site of its “first hybrid work-designed office, fully hotdesk-based on a scale

larger than we've had before”.

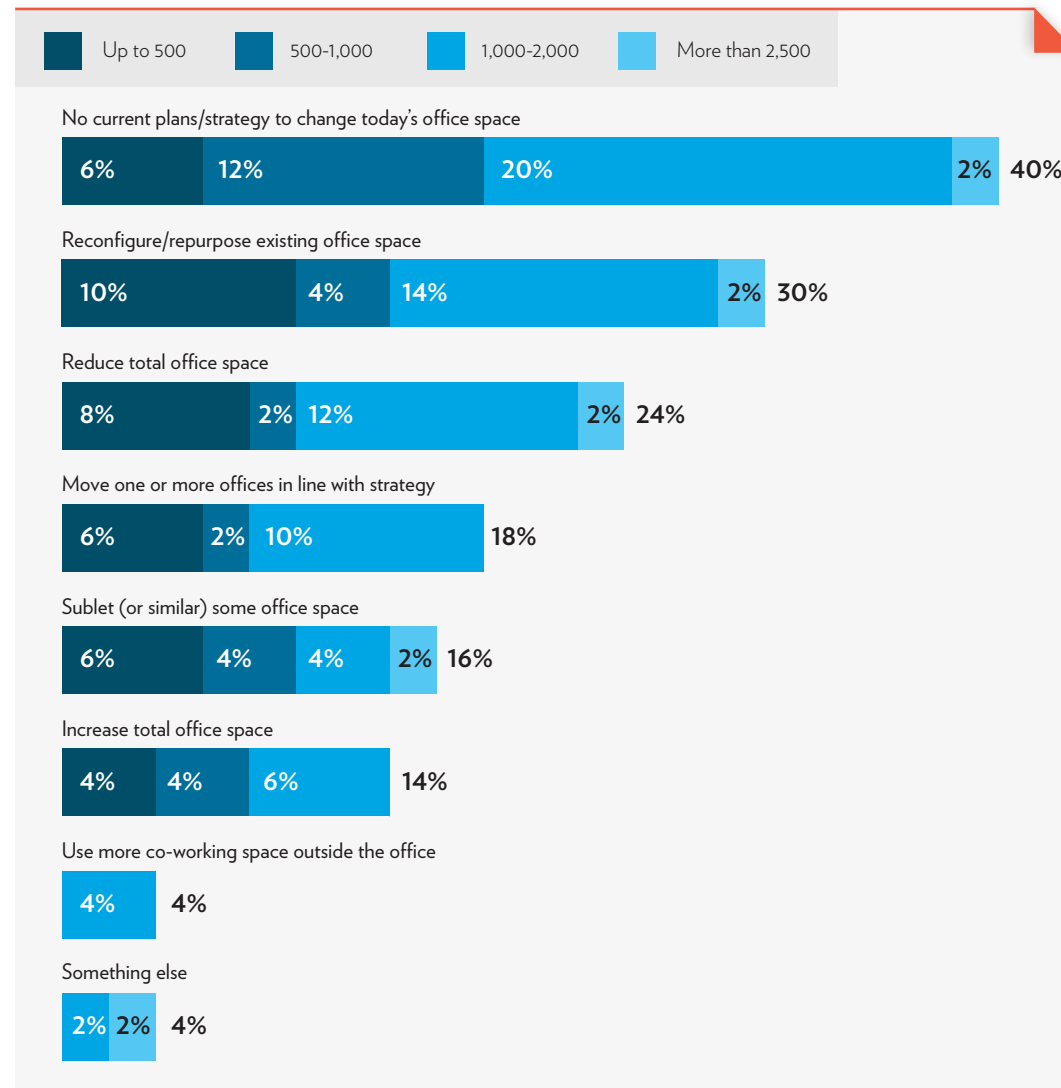
“There is not one individual designated office, but critically a lot of flexible space. There's also a very central social space where people can meet for coffee, and anecdotally many say they've met people there for the first time after weeks or months of talking or emailing. You don't want these conversations to be too forced or formal — and this way people are helped to grow their own networks.

“Attentive office design can also ensure people flow around a building — and bump into one another more than they would otherwise — and although refitting is of course a cost, there's a business value to making it happen.”

The possibilities of office space are also “front and centre” for the strategy board at Penningtons Manches Cooper, says McNamara. “With our net zero target for 2040, sustainability is one very big ▼

Over half of law firm leaders are looking to reduce and/or repurpose office spaces by 2028

Leadership plans to change the amount of firm office space in the UK within the next three years



driver of decisions. However, we also want our offices to be places that people will want to attend — not every day, but regularly — and we want their use of that space to be effective.”

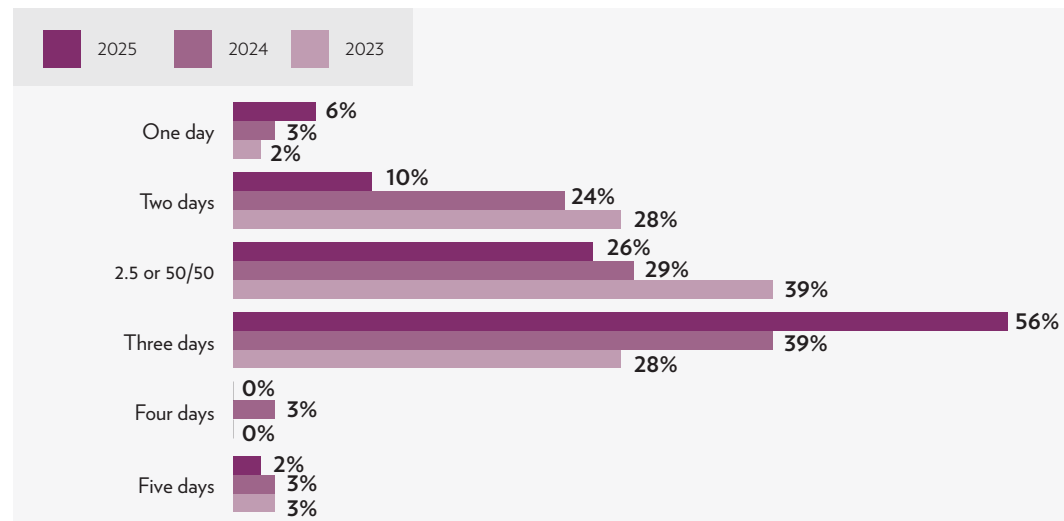
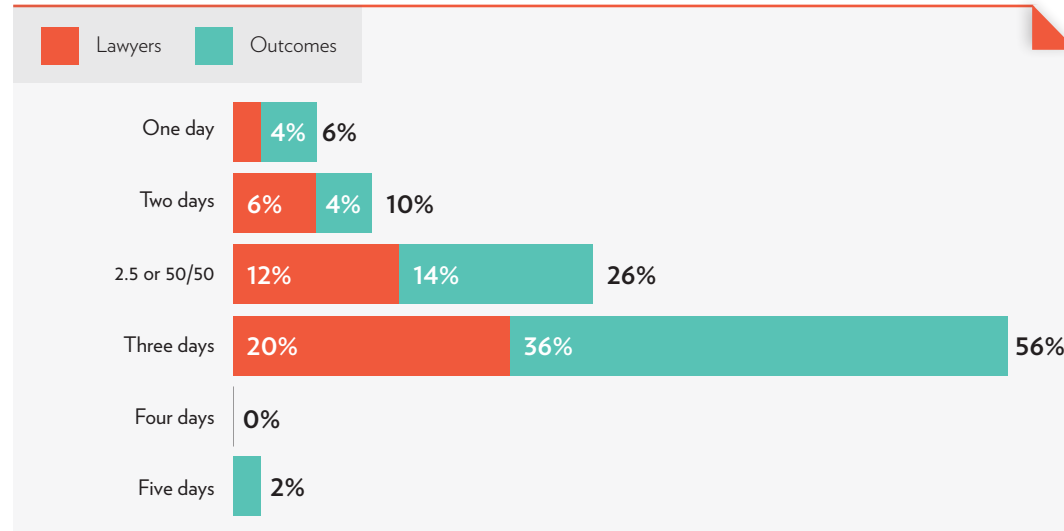
She highlights that hybrid-working in larger offices tends to lead to people becoming more dispersed at work. Creatures of habit, in the absence of any policy they’re likely to pick a desk and fall into a pattern — so you get a few groups coalescing, and the floors just aren’t as busy. “When you close some floors for a refurbishment, you really see the impact in people being pushed a bit closer together again,” she says. “You foster the tacit knowledge-sharing, the learning, collaboration and feeling of belonging, because there’s that much more of a buzz around the office. A half-empty office probably isn’t conducive to collaboration — and a silent office isn’t helpful for learning and development. People must also feel that they can talk to each other.”

Toffanello at Birketts agrees: “Opportunities present themselves with each new reconfiguration.” But he says the hybrid-work productivity challenge for a firm centres as much on how people behave in these spaces as exactly which spaces are available.

“For example, I like to walk the floors and hear what’s happening — but you need to do that very deliberately to see the benefit. At Birketts, while there’s a broad expectation of a certain number of days spent working in one of its offices, the

Hybrid-working expected to stay the norm, with little sight of more than three days a week in office

Number of days each week that leaders believe most will work in an office the firm pays for in 2026



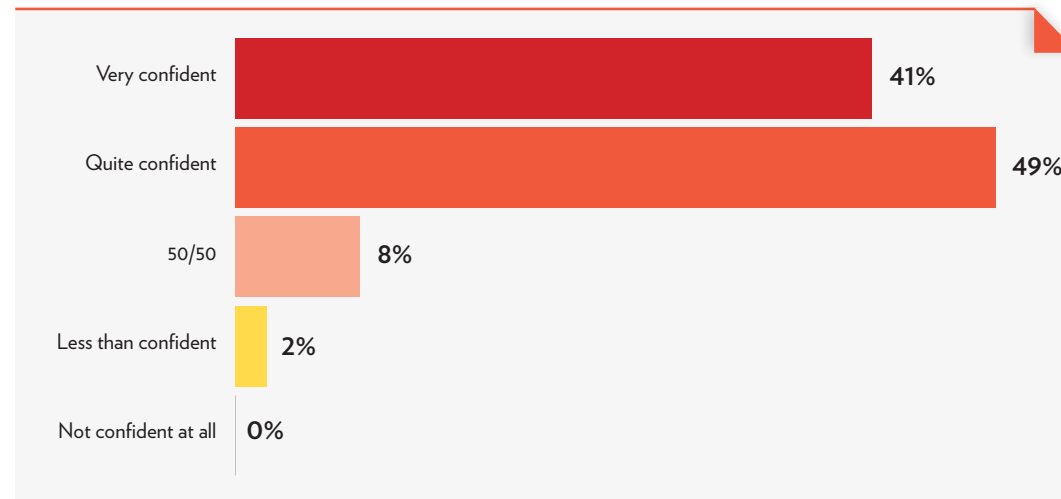
business has also devolved the detail down to a local team level. Some team leaders could be keener than others for the in-person element. Any potential tensions would then need managing – and again, he says, leaders may need to ‘live and breathe’ what a day working in the office looks and feels like to avoid misunderstandings and ensure it’s a productive experience for all.

“We’re now reaching a point where it doesn’t make sense to provide 100% of theoretical capacity 100% of the time. Conversely, we’re not looking to sweat our real estate at the expense of culture. We probably have more space per head than our peer firms, but some teams are selecting specific ‘all in’ days in the office each week, so that we maximise occupation. They need to manage how that time is spent, considering meeting room use, and general user-friendliness, so it’s a worthwhile thing for everyone to be there.”

Mitchell says Cripps is planning to reduce some of its office space over the course of the next year and use the saving to upgrade what’s left. A particular focus is the equipment on hand in user-friendly meeting rooms, and some quieter spaces by design – outside that busy office environment – for taking calls. “One possible challenge for firms today is that their people’s home environments can be better equipped than offices. They have undergone transformation – investing in the experience for themselves. Firms ▼

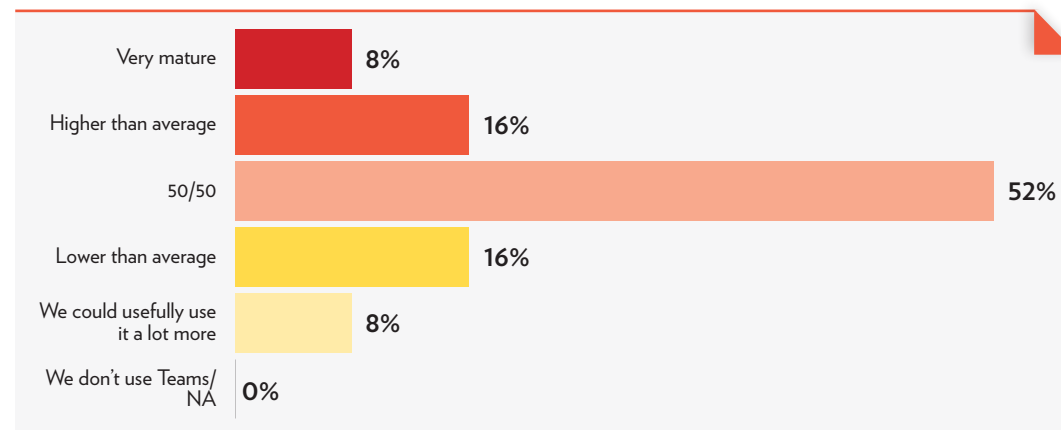
Large majority of leaders confident their firm is set up for productive, efficient and collaborative hybrid-working

Confidence that IT investments/decisions are enabling hybrid work at the quality the firm needs



Three-quarters of leaders believe their firms could make significantly more or better use of Microsoft Teams

Perception of maturity using the range of functionality in Microsoft Teams



must at least try to match that as part of making the office an attractive working option.”

Finally, it must be said that firms may not only be thinking about their own people when placing these bets. For Anthony Collins, the idea of social purpose is a “lens through which we see lots of operational decisions”, says Andrew Keith. “The destination office does make a difference when you get it right, but decisions also depend on what any office is ultimately for.” His firm recently opened a hub in Wolverhampton specifically for serving its childcare work. “We extend our social purpose identity by developing a broader footprint for supporting vulnerable people. If open in more places, we can of course do more good — it’s the same if we manage to attract more talent in a particular location or achieve more traction in a priority market sector.” ▼

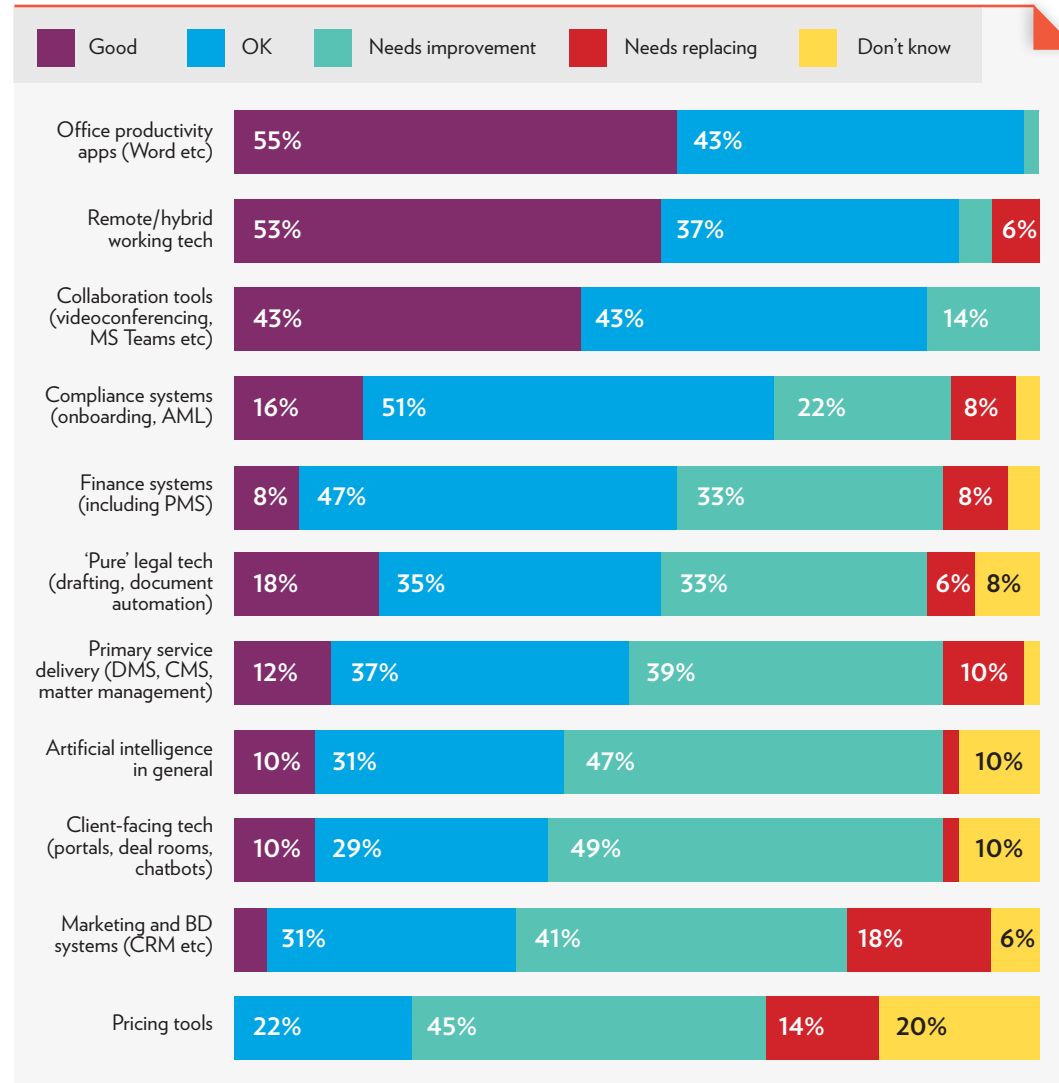
“We’re now reaching a point where it doesn’t make sense to provide 100% of theoretical capacity 100% of the time. Conversely, we’re not looking to sweat our real estate at the expense of culture.”

MARCOS TOFFANELLO

HEAD OF KNOWLEDGE MANAGEMENT, BIRKETTS

Marketing, pricing and client-facing top areas where leaders would improve or replace the firm's current technology provision

How satisfied are leaders with key groups of technology?



“Client service delivery is probably changing faster in some parts of the firm than others, and we’re in the process of finding ways to encourage people to think about how ideas could improve outcomes for client groups.” These can be very specific to a sector and involve different elements — client journeys may be one, data another, “but if we can become more efficient in the way we supply our services for example, we may also be able to invest more in furthering our social purpose.” ▴

Should IT stay or should it go?

Leaders are by and large satisfied with their technology to facilitate hybrid-working and effective collaboration (just 14% believe the latter needs improvement). But as one respondent puts it, “technology can only go so far to replicate” the in-person collaboration experience, and “training and adoption are key”. That said, another does complain of “clunky integration and disparate systems”.

A trend in recent years of **Briefing Frontiers** research, however, they’re most likely to report that marketing/BD systems require replacement (18%) — followed by the pricing tools to support tactical decision-making and profitability levels amid any change in strategy (14%). Both are areas where the absence of a data strategy/strong data practices clearly also sows seeds of potential to

inhibit overall performance.

Leaders are slightly less likely to believe their core finance system needs improvement than was the case in early 2024 — although it is still the verdict of a third. More problematic, it seems, are delivery systems, such as document and matter management (one in 10 still believing one of these needs replacement; 39% favouring a journey of improvement). Leaders are notably more satisfied with compliance (onboarding, AML checks) as an area overall, two-thirds now expressing a view that these are fit for purpose. Conversely, client-facing tech solutions (such as portals, apps or other ‘assistants’) are far more likely to be identified as candidates for fresh investment (half identifying them as ripe for improvement, if not replacement). ▴