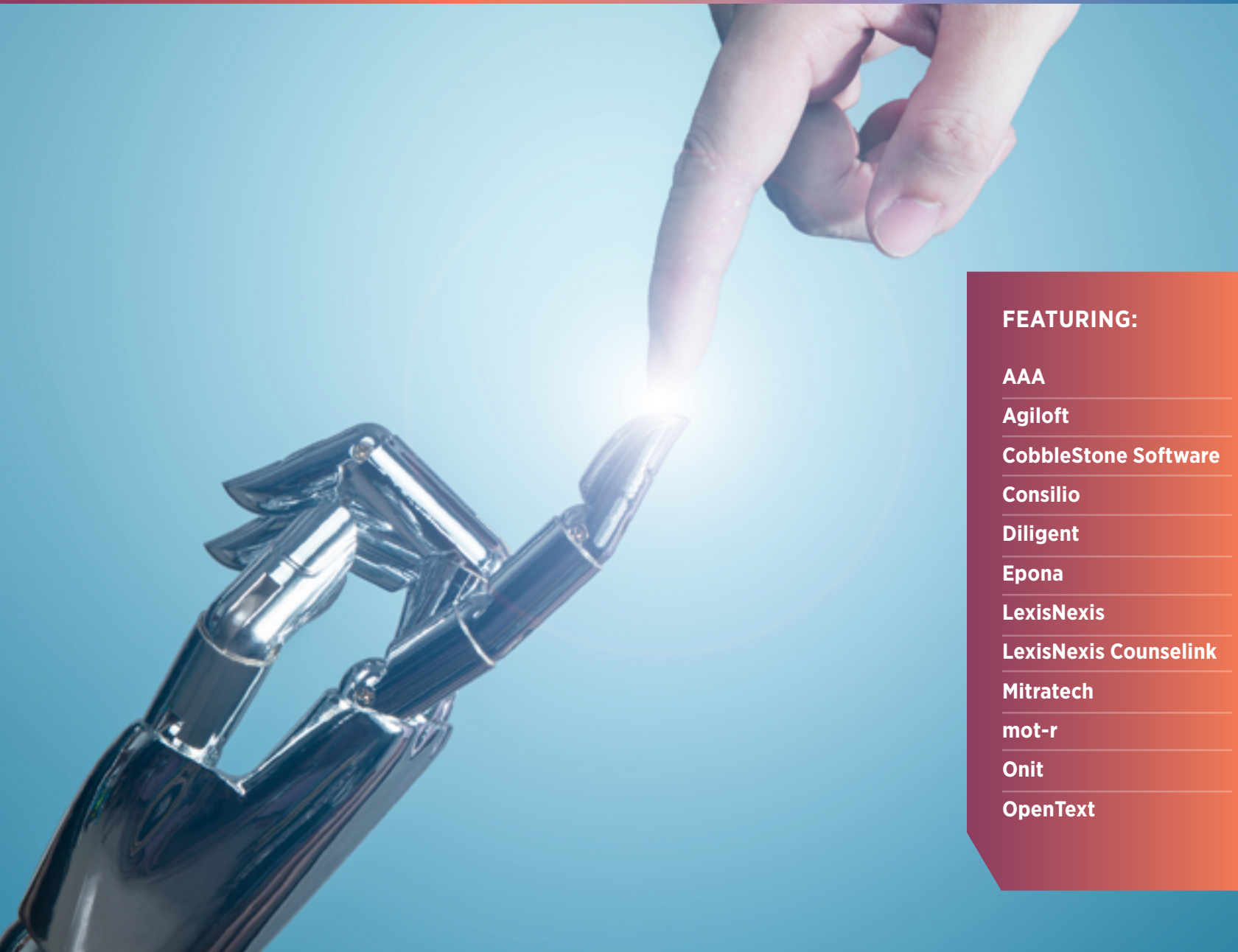


10th Annual
2025 Directory of
LEADING LEGAL TECHNOLOGY AND
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Editor's Note

A Legal Tech Inflection Point

10th Annual Directory of Leading Legal Technology and Project Management Solutions captures a pivotal moment in the evolution of legal departments: the convergence of maturing AI, increasingly sophisticated workflow tools, and growing pressure on in-house teams to operate like strategic business units. What emerges across these contributions is not just a hunger for efficiency, but a reframing of legal's identity—from reactive risk managers to proactive business enablers.

Kris Satkunas and **Stephanie Beck** of **LexisNexis CounselLink** offer a compelling case for AI-powered financial management tools, revealing how most “flagged” invoice violations yield virtually no cost savings. Their insight into the mechanics of billing enforcement surfaces a quiet but costly inefficiency—and the opportunity for greater precision.

Tom Gricks of **OpenText** walks us through the legal industry's journey from TAR to HAR (Human-Assisted Review), suggesting that LLMs may soon possess the ability to reason through documents with enough nuance to assist in complex legal analysis. “These tools are starting to look like they could reason out an award,” he notes, hinting at a seismic shift in how discovery and investigations may soon operate.

From **Agiloft**, General Counsel **Laura Richardson** shares a deeply personal perspective on the evolving CLO role. Her warning is clear: “Failure to adapt to AI is more likely to cost you your job at this juncture than the AI itself.” She frames legal transformation not as a technical project, but as a career imperative.

Sean Heck of **CobbleStone Software** lays out six digital transformation goals that prioritize not just efficiency, but human empowerment. By emphasizing training, adaptability, and incremental improvements, Heck argues that true transformation is as much cultural as it is technological.

Consilio's new *Aurora* platform exemplifies this evolution. As Chief Experience Officer **Michael Pontrelli** shares, *Aurora* addresses growing data volumes, shrinking budgets, and fragmented systems by giving legal teams a unified, intuitive layer of control across matters and platforms. With AI-powered insights, flexible architecture, and scalable performance, *Aurora* is built not just for efficiency, but for transformation.

A standout insight comes from **Diligent's** report on genAI and the general counsel's duty of care. Featuring commentary from **Cecilia Ziniti** and **Sophia Velastegui**, the report suggests that “not using AI” could eventually be considered a violation of a lawyer's obligation to be diligent—positioning

AI as a new standard of professional competency.

Epona's Marcel Lang highlights content control as a differentiator, boldly stating that users retain “100 percent control of your content” because it stays within their Microsoft 365 environment. In an era of rising data sovereignty and compliance concerns, this kind of infrastructure choice carries real weight.

Alaura Jacobs of Mitratach brings workflow automation to life with practical examples—from reducing conflict waiver timelines by 85 percent, to building out “Front Door” request portals that reduce legal bottlenecks. Her emphasis on cross-functional integration positions legal ops as a key business liaison, not just a service desk.

From the **American Arbitration Association**, **Diana Didia** describes a full-scale organizational sprint toward AI adoption. The most striking moment: her acknowledgment that AI-generated awards may not be far off. “We’re not suggesting AI will replace arbitrators,” she says, “but an AI copilot could assist with early case evaluation”—a quiet revolution in dispute resolution.

Matt Lung of **LexisNexis** makes a business case for contract velocity. His internal data shows that using generative AI in drafting workflows has resulted in 60–70 percent of contracts being signed without edits—up from 30–40 percent. That shift isn’t just about speed; it’s a redefinition of negotiation risk thresholds.

Mike Tobias, CEO of **mot-r**, delivers a provocative reminder: “Legal tech spending has nearly doubled, yet burnout has worsened.” His focus on solving the right problems—through better workflow, clarity of roles, and tech that genuinely reduces load—may be the clearest signal yet that transformation isn’t about tools alone, but about thoughtful design.

Matt DenOuden of **Onit** contributes a sharp analysis of how platform consolidation, embedded AI, and deep legal workflow expertise are reshaping legal operations. He positions Onit as a “Pangea” alternative to the

fragmented legal tech ecosystem—one where solutions for spend, contracts, matters, and knowledge are unified on a single platform. Designed “by lawyers for lawyers,” Onit integrates natively with Word and Outlook and delivers AI agents that handle high-volume, routine tasks like invoice review and triage. Rather than replacing legal talent, Denney argues, AI acts as a digital team member—speeding decisions, lowering costs, and preserving human judgment where it matters most.

Nick Whitehouse, **Onit**’s Chief AI Officer, adds another critical perspective: the future of AI in legal is not about replacing professionals, but collaborating with them. He frames AI as a transformative force best managed with clarity and care—defined roles, clear guardrails, and seamless integration into workflows. Whitehouse envisions a model where legal professionals focus on the practice of law, while AI handles the process—supporting everything from triage to billing review with increasing autonomy and reliability.

Taken together, these insights point to an industry in transition—not toward a fully automated future, but one where automation and expertise coexist in deliberate harmony. The legal department of tomorrow will not be defined solely by its tools, but by how thoughtfully those tools are deployed. As AI and legal operations mature in parallel, the challenge is no longer technological readiness—it is strategic clarity. Those who embrace this moment with intentional design, ethical foresight, and operational rigor will not only lead the legal function forward, but help redefine its role within the enterprise itself.



Kristin Calve
Editor & Publisher
 [kristincalve](#)

Leverage Advanced Financial Management Tools to Decrease Legal Spend

Stephanie Beck and Kristina Satkunas, LexisNexis CounselLink



Stephanie Beck

Stephanie Beck serves as Director of Strategic Services at LexisNexis CounselLink, where she advises corporate legal departments on legal spend management, vendor governance, and operational efficiency. She leads a team delivering data-driven consulting and analytics to support matter management, rate benchmarking, and outside counsel optimization. Beck has guided numerous Fortune 500 legal departments in developing and implementing strategies that improve legal department performance and cost control.

When e-billing software is equipped with today's powerful AI capabilities, it can detect savings opportunities that were impossible to find even a few years ago.

In legal operations, a twofold everyday challenge centers around billing and legal spend management. Legal departments experience high volumes of invoices from outside counsel that should receive thorough review. Those without advanced e-billing software engage in this process manually, which can lead to noncompliance with outside counsel guidelines and overpayment of legal fees.

LexisNexis® CounselLink®, a cloud-based [enterprise legal management platform](#), extracted billing data from its database of thousands of corporate legal department customers and respective law firms. It found that, on average, customers approved nearly 700 invoices in June 2024. That may seem like a manageable volume; however, each invoice can have thousands of line items to review.

Particularly for larger enterprises, such as insurance carriers, the volume of invoices passing through the legal or claims department can number upward of 35,000 invoices. For the sake of imagining the daunting task of invoice review generally, let's say that each invoice averages perhaps 50 line items. That equals about 1.75 million invoice line items to review in a single month.

With lean legal teams in most departments, reviewing 1.75 million line items is impossible – unless an advanced e-billing solution is deployed to help. In this high-tech era, most legal departments are equipped with some type of e-billing software to assist with invoice review. But some smaller departments may use software that can't scale for growth; others may use a homegrown combination of software and spreadsheets. Regardless, having the right software can provide valuable benefits. And these days, that means artificial intelligence (AI).

Case in point, according to a [CounselLink](#) data review, legal departments saved nearly 3 percent on outside counsel spend when

invoice review included AI-powered financial management tools configured to enforce billing guidelines.

Put Actionable Legal Department Financial Management Tools to Work

E-billing tools like CounselLink+™ SmartReview®, which is powered by a proprietary AI algorithm, help legal departments efficiently reduce legal spend. Having AI-powered robot eyes perform the first in-depth review of invoices helps immediately generate legal spend cost savings by identifying erroneous charges.

Legal departments that implement billing guidelines and employ e-billing solutions like these can easily reduce the amount paid for legal services billed in error or not in compliance.

For example, in the first half of 2024, CounselLink customers reduced invoice payments by 2.6 percent of the total amount billed during that timeframe.

SmartReview reads each line on an invoice, looking for violations. Depending on the violation, it can either reject the invoice, reduce specific charges or flag charges for further review. Additionally, this advanced legal [financial management tool](#) uses workflows to ensure that the appropriate people are involved in invoice reviews at every step.

Employ Robust Guidelines and Billing Rules to Generate Legal Spend Savings

There are many types of rules employed by SmartReview to help generate the highest overall legal spend savings. For example, the following list of rules can be configured within advanced financial management tools:

1. Billing of only approved billable hourly or non-hourly rates.
2. Timeliness of billing.
3. Nonduplication of charges already billed.



Kristina Satkunas

Kristina Satkunas serves as Director of Strategic Consulting at LexisNexis CounselLink, where she leads a team that provides data-driven insights to corporate legal departments. She specializes in legal analytics, benchmarking, and legal spend management, helping organizations improve operational performance and make informed decisions.

4. Clarity of work performed.
5. Not billing specific disallowed activities.
6. Compliance with matter budgets.
7. Appropriate number of hours or timekeepers.
8. Timekeepers approved to bill against a matter.
9. Billing of legal work, not of administrative activities.
10. Not billing excessive time.

As an advanced legal department financial management tool, SmartReview utilizes AI to review charge lines throughout an invoice and can take three actions:

- Trigger an outright rejection of an entire invoice.
- Automatically reduce or adjust a charge.
- Flag a charge for additional review.

On top of AI, human invoice reviewers play an important role and can use discretion during a manual review of charges to question and efficiently adjust or remove a charge.

Reduce Spend With Legal Department Financial Management Tools

In particular, legal department operations can expect several types of savings when implementing advanced legal financial tools, including “adjust” and “flag” rules.

Adjust Rules

Invoice line-item charges flagged for adjustment result in savings 47 percent of the time.

Rules that are configured to adjust charges have their flags overridden the least often – i.e., legal departments are more likely to allow the adjustment to stand, so that they can benefit from more savings. These three types of

violations are most consistently adjusted on invoices:

1. Unapproved hourly or non-hourly rates have been billed.
2. Duplication of charges already billed.
3. Specific disallowed activities.

It stands to reason that rules about timekeepers not being allowed to bill at rates that exceed what’s been approved are broadly enforced. Other rules that usually result in invoice adjustments also tend to enforce expectations that are in place in virtually every legal department’s outside counsel guidelines.

Flag Rules

Flagged charges result in savings only 0.4 percent of the time.

Notably, some flags are not intended to result in legal spend savings. Instead, flag rules drive the invoice reviewer to validate certain things related to a charge. For instance, a rule can be configured to flag an invoice when a vendor includes fees associated with certain types of experts. A flag for this type of charge is a reminder to the reviewer to confirm that prior approval was obtained before engaging the expert.

Client Discretionary Adjustments

During invoice review, 45 percent of adjustments are a result of invoice reviewers using discretion to reduce charges on an invoice.

Common reasons for discretionary adjustments include:

1. Excessive time.

Average Invoice Savings By Invoice Size



2. Vague charge descriptions.
3. Unapproved work product.
4. Duplicative efforts.
5. General clerical tasks.
6. Lack of supporting documentation.

At the End of the Day, Size Matters

Savings are considerably lower on large invoices (those with more charge lines) than on small invoices.

The more lines to review, the lower the savings:

It is understandable that due to the effort of reviewing each charge line on an invoice with a very large number of lines, the savings would be lower on such invoices. However, given that invoices with more than 1,000 charge lines also have very high billable amounts (on average more than \$800,000), legal departments with large invoices are likely leaving money on the table. If legal departments could more closely scrutinize these invoices, the savings opportunity would amount to millions of

dollars.

Consider These Best Practices

1. If a guideline/expectation is important, make sure the rule that enforces it is configured to *adjust/reduce* charges and not just *flag*.

Rules that are configured to simply flag almost never result in charge adjustments. Rules configured to flag only result in savings 0.4 percent of the time.

2. On a related note, if you have rules configured to flag that never get adjusted because the reviewers believe they are not indicators of guideline violations, turn those rules off.

They are creating noise for the invoice reviewer that may prevent them from looking at flagged charges that really might be worthy of greater scrutiny.

3. Ensure that you have the right team in place to review large invoices.

Invoices with more charge lines receive less scrutiny,

resulting in lower savings.

Tip: Take advantage of CounselLink's Managed Bill Review Services. Allow lawyers who are experts in invoice review to take this burden away from legal operations staff and the legal team. On average, the additional savings obtained offset the cost of the service by five times.

For example, a customer who has used CounselLink Managed Bill Review Services for the last two years has saved twice as much on the invoices reviewed through that service versus all other invoices.

4. Learn from invoice reviewers making discretionary adjustments.

In most legal departments, there are a few invoice reviewers who make many more discretionary adjustments than most. Set up a "lunch and learn" session and ask these individuals to describe their process and key things they look for in their review process, so that the other reviewers can learn from them.

5. Engage CounselLink for a rules optimization project after using CounselLink for at least a year.

It's important to clearly understand which rules are generating savings and to identify individuals who may not be enforcing some guidelines, in order to take corrective action as soon as possible. A rules optimization project is performed by a consultant who reviews a legal department's outside counsel guidelines and then conducts a quantitative analysis of the effectiveness of various rules and the consistency of their application.

The output of the project provides recommendations for rules to add, remove or modify; training (based on inconsistent or inappropriate applications of rules); and changes to guideline language.

On average, in the year following this project's completion, legal departments obtain 2.3 times the invoice savings of the prior year.

Engage Professional Services to Optimize Guidelines

Make sure your billing guidelines are current and include best practices language used by your peers. Professional services teams work closely with legal operations and provide guidance around setting and deploying outside counsel billing guidelines. The teams that work on billing guidelines ensure that the rules are robust and comparable to peer guidelines.

Billing guidelines are a precursor to rule sets. Some legal departments have no billing guidelines, in which case CounselLink Professional Services can help them develop these important documents for outside counsel compliance.

More often, legal departments have billing guidelines, and CounselLink Professional Services reviews, analyzes and establishes updated rules. Because the Professional Services team interacts with many companies, there are established best practices and recommendations that the team provides to legal departments. A primary recommendation centers on the configuration of rule sets around automatic adjustments, date variations and rejections of charges, as well as best practices during invoice negotiations.

Applying these best practices will lead to greater cost savings and more consistent enforcement of your outside counsel guidelines. The use of advanced legal financial management tools provides valuable benefits to invoice reviewers, the legal department and overall budget management. ■

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Transforming Legal Ops for the Modern Business Landscape

Laura Richardson, Agiloft



Laura Richardson

Laura Richardson is an experienced technology attorney who enjoys applying her broad background to help businesses scale humanely. Before joining Agiloft, Laura was General Counsel and Corporate Secretary at Osso VR, Inc., a mission-driven, VR surgical training company, and a former litigator, serving as a Judicial Clerk in the U.S. District Court for the Western District of Tennessee before entering private practice at Sidley Austin in Los Angeles.

From major advances in CLM software to the advent of generative AI, there are more tech tools available to legal departments than ever before – and that means exciting opportunities for legal professionals who are committed to taking full advantage of the ongoing technological revolution.

When you were younger, what was your answer to the old-age question, “What do you want to be when you grow up?” If you knew from the start that you wanted to go into the legal profession, chances are you dreamed of being a lawyer – or, more likely, a specific fictional courtroom lawyer like Atticus Finch or Elle Woods (*I object!*). Because even a young, creative mind couldn’t possibly think up all the roles, responsibilities and jobs available across the legal profession today, especially when such roles were never front and center on *Law & Order* or *How to Get Away With Murder*.

And if you answered “astronaut” or “firefighter” as a kid but went on to become one of the many different types of legal professionals leading the charge on legal’s transformation, congratulations! I hope you see yourself in the land of opportunity and aren’t feeling too sad that you don’t get to carry a large hose up and down a ladder all day long.

The fact is, there’s so much career diversity in today’s legal and contract management fields – along with opportunities for learning, growth and advancement – compared to even just a few short years ago. It’s a great time for business-minded individuals and rising generations to consider everything this career has to offer, even if you don’t have the opportunity to yell “I object!” in a crowded courtroom (although, if you can work in “I object” somewhere at work, good for you). And as the job itself continues to change and evolve, technology is playing a critical role in priming professionals for success not only in the legal department but also across the rest of the organization.

I’m a perfect example of someone who dreamed of a career in one industry, only to find myself in the legal field. Before I landed my

current role as general counsel at Agiloft, I was pursuing a career in archaeology. I was even enrolled in a doctorate program, chasing my dream of becoming a professor, before I pivoted. I even said I would never be a lawyer. But because I've always been drawn to fields that allow me to explore and solve problems, I veered off my original path and onto one where I am truly driving innovation – and getting to have a lot of fun doing it.

The thing is, there's an endless buffet of things you can do and achieve in this industry. Believe it or not, cross-functional problem-solving is *fun* (if you're like me!), because if you hold the keys to the immense amount of data and information in contracts and other legal documents, you hold critical business knowledge in your hands, which can help you make the connections across the organization to find nonobvious solutions to real problems. So, when looking broadly across the legal function and at the information I hold, I think about how my team's work can accelerate the work of the entire business. There's so much value in that, and so much satisfaction in being able to see how your impact ripples out across the organization.

If my unconventional career path has taught me anything, it's that this role really does have longevity, and that's a major plus. Historically, the legal field has been a late bloomer when it comes to digital transformation, which makes sense if you've ever had to do an all-nighter looking through banker boxes to find "the" contract or "the" document. The task of transformation can be very daunting when you know how much data there is to transform. But we're (fortunately) seeing this evolve, as artificial intelligence (AI) solutions and the like continue to improve and demonstrate their ability to accelerate the revolution. In today's legal sphere, if you're not leveraging the transformative power of technology, you'll fall behind.

It's as simple as that. Now is the time to harness these tools and use them to your advantage – for your team, your organization and your career.

In this article, we'll explore how the role of the general counsel (GC) or chief legal officer (CLO) is transforming, how technology comes into play, and ultimately, what impact it all has on career advancement.

The Evolving Legal Landscape: New Tech-Driven Specialties

When we think about the different prongs of the legal industry, it's clear that technology can have a major impact on a variety of areas. For example, contract management can be streamlined with AI-driven tools that automate contract drafting, reviews and compliance checks, significantly reducing administrative workload. Legal research also benefits from tech innovations that speed





up processes, offering more accurate findings and results in less time. The list goes on and on in terms of ways tech is transforming the industry. Even using generative AI solutions for things like creating drafts of job descriptions or helping you to achieve the right tone in an email is a nice and easy assist in what used to be a time-intensive process (just how many exclamation points do I need in this email to make me sound friendlier?).

CLOs can truly benefit from this ongoing innovation. CLOs have the responsibility of overseeing the entire legal department and aligning it with the organization's broader business goals. By implementing the right tech, CLOs can streamline operations, manage legal risks more effectively, and ensure that the legal team is as efficient and proactive as possible. Plus, with technology handling the time-consuming, repetitive tasks, CLOs can focus on strategy,

provide more valuable insights to leadership, and drive overall business success. For lean legal teams managing high-volume workloads, these tools can help individuals get their work done more efficiently, which can free up more time to think or recharge. This leads to improved morale and focus, while decreasing the risk of burnout.

The “Traditional” Role of Legal

The role of the GC or CLO has historically been centered around managing a company's legal risks and ensuring compliance with laws and regulations. The legal department is of course responsible for overseeing all legal matters within the organization (everything from litigation and contract management to compliance and risk management). And the CLO is responsible for advising the senior leadership team, often as an executive themselves, about the legal implications of business decisions, as well

as leading or overseeing any disputes that the company may face. Additionally, legal professionals often manage relationships with external law firms and legal advisors, ensuring that the company gets appropriate legal representation while managing its costs.

Beyond these core responsibilities, the CLO often takes on the role of legal “gatekeeper,” ensuring that a company’s operations adhere to legal standards while protecting its best interests. Until very recently, the general perception of the role was that it was focused on preventing legal problems from arising, rather than proactively driving business strategies. And as you can imagine, in that scenario, the legal function might be seen as separate and siloed from the general business operations, with the CLO playing a reactive role rather than being actively involved in shaping or influencing the company’s broader goals or strategies in a way that drives growth and mitigates risk.

If I may be so bold as to say, a siloed legal function and a legal leader who is seen as separate from the business is a wasted opportunity for the organization – and a far less exciting path.

Today, the CLO role is sitting at an important – and far more valuable – juncture, broadening to include strategic business decision-making in real time. And as companies face a more complex and fast-changing environment, the CLO is a key player in driving overall organizational success.

Legal Ops and Business: Driving Efficiency, Compliance, and Growth

Legal operations (legal ops) is becoming an increasingly pivotal part of an organization’s broader strategic framework. That said, it comes with its own set of unique challenges. Legal ops professionals are tasked with things like managing complex workflows and optimizing resource

allocations, all in the name of enhancing efficiency across legal teams and the adjacent functions they support.

But as these roles evolve, legal teams are expected to shift from traditional responsibilities to more comprehensive, data-driven ones. No longer merely advisors, legal teams must embrace a mindset that values analytics, process optimization and agility to meet the fast-paced demands of modern business. They have to adapt to new technologies, break down internal silos, and align their department with overarching company goals faster and better than before.

Amid this season of transformation for legal ops teams and CLOs themselves, contract lifecycle management (CLM) software – which streamlines and automates the entire contract process, from drafting to execution and renewal – has emerged as a critical tool for legal teams and legal ops professionals tasked with analytics, optimization and meeting the demands of the rest of the business. CLM solutions enable legal teams to manage vast volumes of contracts efficiently, while ensuring compliance, reducing risks, and improving speed to market.

What’s more, contracts are proving to be so much more than simple agreements – they contain a goldmine of data that can help organizations plan, operate and perform better. And when CLM tools are used correctly, CLOs are uniquely positioned to distill this information in a way that can directly impact the bottom line.

For the CLO, this presents an opportunity to drive true organizational change by fostering collaborations between legal, procurement and other critical business units. By embracing tools like CLM and encouraging a culture of data-driven decision-making, the CLO can not only optimize the legal department’s operations but also

contribute to the company's overall success. It can help legal teams better track and analyze their own processes and create scalable ways to demonstrate how they are supporting the organization and identifying areas for proactive improvement. This multifaceted role offers the chance to redefine the value of the legal function, positioning it as a strategic, value-generating part of the business.

No Longer the “Department of No”

I strongly believe that the “department of no” stereotype is not only outdated but also harmful. From the very beginning of my in-house career, I was taught to focus on being risk-optimized – finding ways to accelerate the business while addressing risk effectively. The idea that legal departments are there to slow things down is often a misconception. The reality is that at a lot of companies, legal is a true business accelerator, not a bottleneck. When people fall back on this negative label, it creates a reputation that doesn't reflect the true value of most legal teams, and it can ultimately hinder collaboration and progress and create friction between legal and the functions it supports.

To build a successful legal department, and show that it is a business enablement function, it's essential to hire professionals who bring a broader perspective – those who are problem solvers, open to new technologies, and capable of understanding the wider business context. Just as in any other department, the effectiveness of the legal function depends on the quality of the people within it. When I'm hiring, I prioritize good judgment over mere attention to detail. I want someone who knows when the details matter and when they don't. The second most important trait? A sense of humility and adaptability. Legal professionals must be able to detach from outdated practices and embrace change. In-house roles today are

vastly different than what they were a decade ago, and they'll continue to evolve in the future.

You can be in this field *and* be an accelerator of business. It's a mindset thing.

Tech-Driven Legal: Transforming In-House Counsel for the Future

Technology, especially generative AI, is playing a pivotal role in reshaping the way in-house legal teams operate. By automating mundane, repetitive tasks such as document review, compliance checks, and contract drafting, AI and automation tools are freeing up legal professionals' bandwidth and brainpower, allowing them to focus on more high-level, strategic activities. Meanwhile, tools like CLM systems, predictive analytics, and AI-powered legal research are allowing legal teams to make faster, more informed decisions, driving business growth.

Moreover, legal tech is creating a more collaborative environment between legal teams and other departments. This type of synergy across previously siloed departments is providing organizations with a powerful combination of increased efficiency and deeper insights into the business landscape, positioning legal teams as a driving force for growth.

Beyond the Lawyers: Essential Roles in In-House Legal Teams

Let's look at some of the essential in-house legal roles, their responsibilities, and how they help the larger organization.

- **Legal operations manager/analyst:** The legal operations manager is responsible for streamlining the overall legal workflow and processes and has become the connective tissue within the legal team, as well as between the legal team and the functions it supports.

Legal operations professionals often implement and manage legal tech like CLM tools and platforms to oversee the budget, analyzing data to optimize the overall performance of the legal team. These are also the storytellers of the legal team, adept at collecting and using data to help better demonstrate the value and effectiveness of the legal function.

- **Contract manager/administrator:** The contract managers on your legal team are responsible for drafting, reviewing and ultimately managing contracts throughout their lifecycles. They are often the ones leveraging CLM software to more effectively and efficiently maintain the contract database and track key deadlines, ensuring compliance with company policies and legal standards. They're also the people who interface with the rest of the organization on contract data and performance, as the subject-matter experts in the world of contracts.
- **Compliance officer/specialist:** Compliance specialists focus on both regulatory and ethical compliance policies, conducting audits and assessments of risk. These roles may be situated within the legal department or other parts of the organization, but they always work closely with contracts and contract details and can benefit from having greater access to the information contained within contracts, which is best accessed through CLM solutions.
- **Cross-functional partners:** Beyond those sitting directly in the legal department, there are several other roles across the organization that rely on contract details for success in their daily responsibilities. These include vendor relationship managers and other procurement professionals, sales operations professionals, finance professionals, accounts payable professionals and

more. They are all critical partners in operations and in many other matters. Do not underestimate the value of forging good relationships with these teams or learning to work collaboratively with them on complex business issues – and especially make sure to seek their input when implementing your CLM system.

- **Artificial intelligence:** I often hear legal professionals worrying about AI taking their jobs, but the truth is that failure to adapt to AI is more likely to cost you your job at this juncture than the AI itself. AI lacks the senses and human experience that we bring to the table. I've worked with tools like ChatGPT, and while they can generate incredible content, they don't always have the ability to validate or refine information in the ways that are required for legal department output (case in point, obvious or nonobvious hallucinations like made-up case law). The magic happens when you combine human senses and experience with the computational power of AI. It's a partnership, and when you invest time in learning to engage with AI, it becomes more collaborative and creative in a way that feels natural. Modern legal leaders understand this – they embrace technology with an open mind, acknowledging its risks but also leveraging it to be wildly successful. Think of AI at this stage as a very junior assistant with a ton of energy and unlimited ability to learn and take feedback, but someone whose work you still need to evaluate critically before hitting print or send.

Each of these roles plays a key part in the modern legal department, and these are the common threads they share: contracts, the details within them, and the impact that contract data can have on the broader organization beyond the confines of the legal department. Using the (typically untapped) potential of the data gleaned from contract information, those who work closely with these



documents can put more strategic thought into not only the impact this information has on their company but also how perfecting the analysis and strategic use of contract details can affect their individual career journey.

Again, there's longevity in these roles. You can share the burden of power by unlocking the library of information within contract data and leading the adoption of legal technology and generative AI tools. The truth of the matter is that you must adapt! It's part of the job now. You don't have to be an expert, but you do need to hire experts, delegate effectively and identify talent to make it work.

CLM as a Career Catalyst: Advancing in the Legal Industry

One of the key challenges in contract management is the sheer volume of data. I like to call it the "unlocked library of information." For a long time, contracts were just sitting in a repository, packed with all sorts of valuable info – like renewal dates, notice periods and deeper relationship details, especially in more complex agreements. But these

contracts lived in an obscure, inaccessible repository, making it hard to search for what you really needed. Therefore, individual lawyers ended up becoming the sole keepers of that knowledge. They'd even build their own little mini repositories on their desktops, which meant that they were the only ones who really understood the relationships and the details within those contracts. It's a bit like the chaos of a complicated spreadsheet where only one person knows how it works – if they leave, you're stuck.

This is where CLM comes in. It helps remove that "human glue" – people who are the only ones with that knowledge. Here, legal teams are presented with more opportunities for growth, as CLM tools allow them to drive strategic change within the organization, demonstrating leadership and decision-making skills that can advance their careers.

There's also the automation of manual, time-consuming tasks that contributes to professional development. Because the software handles routine tasks, professionals

can redirect their focus toward more strategic activities, like analyzing data and identifying areas for improvement or innovation. (That said, the need for in-the-loop humans remains critical – more on that later!) With tools like Agiloft's no-code interface, users can create and manage custom workflows, rules and AI-driven contract processes without needing specialized programming knowledge. This empowers legal, procurement, sales and the like to take ownership of their processes, further expanding their skill sets.

For example, a contract manager may evolve from focusing solely on contract reviews to taking a more strategic role, analyzing trends and recommending operational changes based on contract performance data. Thanks to the power of technology, legal professionals are better equipped to take on higher-level roles with broader organizational impact – no matter where they currently sit within the hierarchy of the legal team. The result is a win-win: more efficient business processes and more advanced career trajectories for employees who leverage these tools effectively.

The Human Element Remains Indispensable

Obviously, this article is pro-technology and pro-automation, but let's make one thing clear: The human element remains indispensable. While tools like CLM software and AI are transforming how legal teams operate, it is the professionals behind these technologies who ensure their effectiveness. The integration of technology should enhance, not replace, human decision-making and expertise.

The senses and experiences of a human combined with the insane computational power of AI is the sweet spot that all legal teams should be striving for. Professionals can leverage AI to a point where it is more collaborative and creative, if they make an investment in thoroughly

engaging with it.

A high-performing legal team should be composed of skilled professionals equipped with the right tools and empowered to deliver exceptional results. It's all about having skilled individuals who understand the impact of today's modern tools and are motivated to use them to their full potential. By doing so, professionals can produce a level of judgment, creativity and critical thinking that technology alone cannot replicate. Not to mention, all of this furthers the organization's investment in employee development, fostering a positive work culture and promoting the kind of work-life balance that is essential to attracting and retaining top talent.

Leveraging Legal Tech for Career Growth and Impact

As a legal professional, by asking yourself how these tools can improve your team's work experience to create more time for the things that truly fuel us, you're not only investing in an upward career trajectory for your team but also prioritizing a healthier work-life balance. When I think about the kind of life I want, it's all about having more time for the things that truly matter – like being with family, doing work that excites me, taking vacations and spending more time on things that inspire me. And when I look at legal tech, it's not just about how it benefits my company – it's about how it helps my team make more time for those things that matter most. When we have time to recharge, we're more creative, energized and better at solving problems. That's why I'm such a believer in legal technology: It can really help give people back the time they need to feel their best.

When our tanks are full, we are better equipped for problem-solving and creative thinking – ergo, professionals can make time to think strategically about how they can directly impact the business and accelerate their own careers. ■



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6 Goals for Digital Transformation in 2025

Sean Heck, CobbleStone Software



Sean Heck

Sean Heck is Content Marketing Manager at CobbleStone Software where he is a subject matter expert in analytics and strategy. Sean has expanded upon his journalistic writing skills by applying them to B2B content marketing and SaaS product marketing initiatives. He is a graduate of Temple University with a BA in English Language and Literature.

From improved operational efficiency to cost optimization to human empowerment, digital transformation comes with many advantages – and those that don't adapt to the evolving technology landscape risk getting left behind.

As business technology evolves, organizations must take inventory of how they can most fully embrace those new technologies. This applies to legal professionals and contract managers throughout the contract lifecycle. Contract management professionals need to evolve their digital transformation goals as time passes, and legal technology grants them more efficiency, incredible innovation, and significant returns on investment. To that end, here are six digital transformation goals for contract managers in 2025, to help them improve customer experiences, client relations, business outcomes, and more as they pursue their digital transformation journey.

What Are the Goals of Digital Transformation?

While digital transformation initiatives integrate technology into a broad spectrum of business processes, digital transformation goals are an organization's long-term, specific objectives in this pursuit. Cross-functional digital transformation goals often include:

- Operational efficiency.
- Human empowerment.
- Data-driven insights.
- Competitive advantages.
- Cost optimization.
- Agility and adaptability.

Let's look at how this digital transformation strategy applies to contract managers.

1. Operational Efficiency

Improving efficiency is essential in [contract lifecycle management](#) because it allows contract managers to streamline the [eight stages](#)

[of the contract lifecycle](#), minimize errors, and reduce costs associated with contract management bottlenecks. It is one of the key objectives of digital transformation.

One way to streamline operational efficiency is to maintain a [secure contract repository](#). Efficiency is gained immediately via the ability to search for all contracts, data and related attachments within a single source of truth. Saved searches, search history and “Did you mean ... ?” functionality make it even easier to search for contracts, data and files down to the phrase, term and even word level.

Another facet of [contract management software](#) that promotes operational efficiency is the ability to extract key metadata from contracts in an automated fashion. Key dates, company information and clauses can be extracted from contracts and mapped onto a tidy contract record screen. These fields can be leveraged for workflows and easily searched. What’s more, dynamic templates can be merged with clauses and key metadata to automate the creation of a contract document.

Operational efficiency is one of the most critical digital transformation goals, and these are just some of the many ways you can achieve this objective in pursuit of a successful digital transformation.

2. Human Empowerment

To empower employees, contract administrators and decision-makers should give them the power to better negotiate terms, make decisions and take ownership of contracts.

For this digital transformation goal, we recommend providing the necessary training and support to effectively manage complex and voluminous contracts with legal

technology, fostering a sense of responsibility and ownership. Be sure to choose a provider that offers training events, optimization resources, conferences, a wiki, and more, so that employees can genuinely master taking the reins when leveraging digital technology for contract management.

Human empowerment is among the main digital transformation goals, because the human experience is part of the reason that we implement digital technologies to begin with.

3. Data-Driven Insights

Data-driven insights allow contract managers to make informed decisions based on evidence, leading to better risk mitigation, negotiation strategies and contract performance.

We recommend a few strategies here for data analytics:

1. Leverage [generative AI](#) (artificial intelligence) with machine learning to automatically create clear and concise clauses, analyze risk and present positive, negative or neutral aspects of contract sentiment for both sides.
2. Utilize executive graphical dashboards for visually engaging contract analytics at a glance – such as contract amounts, spending, key performance indicators and open tasks across the contract repository.
3. Use a custom report designer to present data-driven insights designed in the way contract managers prefer.

With data-driven insights, which is another one of the



critical digital transformation goals, your team can make decisions based on what's actually happening within your contract database.

4. Competitive Advantages

Competitive advantage is one of the key digital transformation goals because it allows contract managers to leverage contracts to gain a leg up on competitors by streamlining contract execution and performance, reducing risks, and optimizing costs.

We recommend leveraging AI-powered contract management software for a competitive advantage. It automates repetitive tasks that competitors using manual processes will be hung up on. Additionally, contract managers have data-driven insight for consistent process improvements that competitors using manual processes will miss out on. Furthermore, competitors relying on manual processes may overlook risk factors that contract

managers using contract lifecycle management (CLM) software can nip in the bud.

5. Cost Optimization

Cost optimization is one of the critical digital transformation goals because it allows businesses to pinpoint and reduce unnecessary expenses by carefully reviewing and negotiating contract terms, minimizing risk-associated spending, and improving resource allocation to reduce wasteful expenditure across all contracts.

Digital transformation with contract management software helps with cost optimization and revenue growth in several ways.

1. Improved compliance management reduces the costs associated with noncompliance and failure to observe regulations.

2. [Intelligent workflow automation](#) with task alerts, notifications and escalation capabilities virtually ensures that deadlines are not missed, obligations are met and money is saved.
3. Data-driven insights into single contracts and the entire repository allow users to leverage historical data and identify high-spending areas while negotiating better deals with counterparties.
4. Proactive renewal reminders allow users to renegotiate better terms promptly.
5. Risk assessment tools allow users to avoid costly risk exposure and risk events.
6. Budget and financial reporting tools empower users to gain a holistic oversight of spending.

We recommend optimizing costs with CLM software.

6. Agility and Adaptability

Agility and adaptability are among the most critical digital transformation goals. They allow organizations to evolve contract management without costly and time-consuming interruptions and learning curves. Investments in CLM technologies that help drive organizational success should include features that integrate with legacy solutions while also having the ability to add innovative technologies as they develop and improve. A contract manager should also have a comprehensive system that can be configured to their organizational needs even as they change and grow. As a contract management software solution, CobbleStone Software® embraces its position as a leader in CLM according to analyst reports like QKS's [SPARK Matrix™ report](#) and The Hackett Group's [Digital World Class Matrix™](#). If you are looking for an agile and adaptable legal technology solution, we recommend CobbleStone Contract Insight®.

CobbleStone® regularly shows its adaptability to industry demands, such as with its future-minded generative AI and the release of new features and enhancements throughout the year. Its users can take full advantage of features like auto-extract and intelligent workflows, electronic approvals and e-signatures, dynamic templates and clauses, online negotiations and compliance monitoring, and many others. Users can also take advantage of a lengthy list of compatible integrations, including legacy data migration as well as planning for the adoption of future technologies.

CobbleStone adapts and improves its solutions incrementally to provide ample resources that prevent users from getting overwhelmed or falling behind as legal tech advances.

Additionally, thanks to CobbleStone's various trainings, resources and conferences, you can rest easy, knowing you have a partner who is committed to the agile and seamless adoption of new features and enhancements for better contract lifecycle management. ■

Data-driven insights allow contract managers to make informed decisions based on evidence, leading to better risk mitigation, negotiation strategies and contract performance.

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Reengineering the Legal Data Layer for Control, Scale, and Insight

Michael Pontrelli, Consilio



Michael Pontrelli

Michael is the Client Experience Officer for Consilio, a global leader in eDiscovery, document review, Enterprise Legal Services, and Legal Transformation Services. Michael's role as CXO is to create alignment on Consilio's definition of service excellence, and to support his colleagues in bringing the CX vision to life.

Amid rising complexity and constrained resources, legal teams are adopting new frameworks that unify oversight, improve performance, and unlock institutional knowledge.

CCBJ: The legal industry is at an inflection point with rapidly evolving data landscapes and rising demands for efficiency, transparency and control. Consilio has introduced Aurora as a next-generation solution to redefine e-discovery. What critical industry challenges does Aurora directly address? And why is its introduction a pivotal moment for the legal industry?

Michael Pontrelli: Sure. From a macro perspective, what we have seen and continue to see, is that legal teams face exponentially growing data volumes while their resources remain constrained and timelines are tightened. Everyone is being challenged to do more with less. We also know this because we recently released our fifth annual global survey called, "Beyond the Gridlock: Overcoming the Challenges of Modern Legal Work." In it, we found that nearly half - 48 percent of respondents - ranked overwhelming work volume as the biggest challenge they face. Amid this heavy workload, legal professionals also cite growing budgetary constraints, rising infrastructure and enterprise software costs, rising e-discovery costs, global complexities and headcount freezes as additional headwinds. We've continued to see the sheer scale of workload forcing many legal professionals to focus on fixing the here and now, which our research quantitatively reinforces to enable them to allocate their efforts and resources toward innovative, new technologies that can one day lessen their workload.

Specifically, I consistently hear about the frustrations caused by data trapped in disparate platforms and repositories. Aurora changes that paradigm completely. We heard our clients and we listened to them. As an industry leader, we acted and developed Aurora, our digital enterprise platform by providing a single point of control and visibility across their entire portfolio. Legal teams can track the progress of all matters, manage resources efficiently and access powerful cross-project insights from one intuitive interface.



There are three critical pain points that Aurora directly addresses. There's the forced choice between standardizing on a single platform, losing control, or fragmenting across multiple solutions.. Valuable insights and work product are trapped in platform silos, requiring teams to start from scratch with each new matter. And unpredictable and escalating technology costs, particularly with public cloud solutions. Aurora takes a fundamentally different approach by positioning as a digital enterprise platform that sits upstream from review platforms. Rather than being another review tool, Aurora creates a central control layer that preserves platform choice while maintaining unified visibility. Aurora transforms scattered information into a reusable knowledge base, allowing access to past work product and insights across all matters.

Historically, e-discovery platforms have forced clients to choose between control and flexibility, often sacrificing one for the other. Aurora is positioned as a breakthrough that eliminates this trade-off. What fundamental shifts in platform architecture and strategy enable Aurora to provide

unprecedented autonomy while maintaining the governance and security essential to legal workflows?

The industry has traditionally operated on the assumption that you must choose between standardization for control or flexibility for freedom. Conventional platforms typically force this trade-off, adopt a single system for unified control or use multiple specialized tools at the cost of fragmentation. Consilio has taken the approach of leveraging any proprietary or Consilio-enhanced solution that solves our client challenges. We've built Aurora on this foundational design principle.

Aurora rejects this binary thinking by fundamentally separating data management from review tool selection. This separation is achieved through Aurora's DataCore, which provides a secure data foundation with complete governance, while the Aurora Portal delivers unified visibility. The Aurora Portal gives complete transparency and control through one interface to manage all platforms, all matters and all workflows. By maintaining a unified

data strategy independent of review tools, legal teams can select the optimal platform for each matter while preserving portfolio-wide intelligence.

Performance at scale is a non-negotiable factor for modern e-discovery. Consilio has made significant investments in private cloud infrastructure to support Aurora. How does this technological foundation differentiate Aurora's ability to process massive and complex data sets while ensuring enterprise-grade reliability and speed?

Consilio has built a global private cloud infrastructure, specifically engineered for legal data workloads, not a general-purpose environment. The purpose-built infrastructure delivers three critical advantages. First, enterprise-grade security with complete data sovereignty in the client's chosen jurisdiction. Next, consistent, predictable performance that doesn't degrade during peak usage periods. And finally, cost predictability without the surprise charges common in public cloud models.

Our data centers are strategically positioned globally to support matters while ensuring data residency compliance. Aurora's architecture leverages massive parallel processing capabilities designed for the extraordinary data volumes in modern litigation. By owning our infrastructure optimized specifically for legal workloads, enabling capabilities that would be prohibitively expensive in generic cloud environments.

The increasing complexity of data ranging from structured databases to ephemeral messaging platforms has made traditional e-discovery tools inadequate. How does Aurora redefine the way organizations handle data diversity and what technological advancements set it apart from previous generation solutions?

Aurora addresses data complexity through a three-layered approach. First, unified ingestion that standardizes diverse data inputs from more than 100 distinct sources. Next, intelligent processing that structures and enriches information and finally, flexible outputs that deliver data to the right tools for specific tasks.

Our data core technology has been refined over more than a decade, processing data across thousands of matters annually. Rather than focusing all data into a single format,

Aurora preserves critical, contextual information while standardizing access. We've built Aurora to leverage metadata intelligence, allowing meaningful connections between disparate data types. This approach enables Aurora to rapidly incorporate new data types as they emerge without requiring platform-wide redesigns.

New architectures reject the binary of control versus flexibility, offering legal teams nuanced strategies tailored to matter complexity.

AI and machine learning have transformed legal technology, but their implementation has often been met with skepticism regarding trust, transparency and reliability. How has Aurora's advancing AI and e-discovery in a way that enhances human expertise rather than diminishing it? And what safeguards are in place to ensure responsible AI drive decision making?

This is a great question. Consilio views AI as an amplifier of human expertise, not a replacement. And we call this "Expert-Led AI." Getting data ahead of review platforms

in Aurora DataCore is a fundamental step in unlocking AI leverage. Clients locked into other platforms are having to meter their data in order to aggressively control spiraling costs, which defeats the purpose of AI.

Aurora's AI integration follows several key principles, the right AI tool for the right task (task-appropriate AI), human oversight at critical decision points and transparent AI operations that explain their reasoning. We've designed Aurora to create a virtuous cycle where AI suggestions improve through expert feedback. Specific AI applications in Aurora include AI Investigate for pattern discovery across large data sets, AI Summarize for efficient document analysis and Contextual AI for identifying relationships between seemingly disparate information. Our approach ensures AI remains a trusted advisor rather than an opaque decision-maker. For more advanced AI workflows, such as running AI-powered document reviews, our experts can step in to guide and help deliver positive outcomes.

Beyond its technological innovations, Aurora represents a fundamental shift in how e-discovery services are delivered. How does this platform mark the evolution of Consilio from a technology provider to a strategic partner helping legal teams achieve more consultative and outcome-driven engagements?

Aurora will be transformational as we work in Aurora together. Aurora transforms our service delivery from transaction-based to outcome-focused by creating a continuous advisory relationship. Our teams now serve as strategic partners who can leverage portfolio-wide insights rather than matter-by-matter technicians. Aurora enables our consultants to provide data-driven recommendations based on cross-matter intelligence, proactively identify opportunities for process optimization and deliver a consistent service experience regardless of matter type or technology choice. Aurora's AI capabilities augment

our team's ability to identify patterns and insights across massive data sets.

The platform's unified visibility empowers both clients and our service teams with the same real-time information. This shared view creates a collaborative environment where our experts can focus on strategic guidance rather than routine coordination or tasks.

Unlike many industry incumbents that have been built closed ecosystem, Consilio has deliberately designed Aurora to reject the walled garden approach. Why is vendor lock-in a major barrier to innovation and client success? And how does Aurora's open architecture ensure legal teams have the flexibility and choice they need for the future?

We have our clients' best interests at stake, and it really is about optionality. We believe client optionality is crucial because legal matters have unique requirements that no single platform can optimally address. Innovation occurs across the industry, not just within one provider. And technology selection should be driven by matter needs, not vendor constraints.

Aurora's architecture reflects this philosophy through vendor-agnostic data management that works with multiple review platforms, open APIs that enable integration with best of breed tools and flexible deployment options, including hybrid models. Our business model aligns with this approach by charging for value delivered rather than data volume, not penalizing clients for using multiple technologies and supporting client choice in AI models rather than forcing a single option. This flexibility is particularly important as AI rapidly evolves. Aurora lets clients leverage emerging innovations regardless of source, which is truly powerful.



With an increasingly globalized client base, e-discovery solutions must not only scale, but also adapt to constantly shifting regulatory and geopolitical landscape. How has Aurora been designed to accommodate the complexities of cross-border data governance while still delivering a seamless and intuitive user experience?

Consilio supports global e-discovery and document review operations for our global corporate and law firm clients. Aurora was designed from the ground up with this context in mind, for global operations with regional data centers ensuring compliance with data sovereignty requirements, configurable workflows that adapt to jurisdiction-specific procedures and multi-language support throughout the platform.

Our architecture employs a “global core, local implementation” approach that maintains consistency while accommodating regional variations. Specific features addressing global complexity include jurisdiction-aware data handling rules, privacy by design capabilities including automated PII detection and customizable security controls that can be tailored to regional requirements. Consilio’s global consulting team provides expertise in navigating regional complexities and our 24/7 follow the sun support model ensures client assistance regardless of time zone. Aurora’s unified interface presents these complex capabilities through a consistent experience, hiding the underlying complexity from users while preserving the power to address regional requirements. ■

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Generative AI: A Transformative Tool for the General Counsel

Diligent



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Diligent created the modern governance movement. As the leading governance, risk and compliance (GRC) SaaS company, we serve 1 million users from over 25,000 customers around the globe. Our innovative platform gives leaders a connected view of governance, risk, compliance and ESG across their organization. Headquartered in New York, Diligent also has offices in Washington D.C., London, Galway, Budapest, Vancouver, Bengaluru, Munich, Singapore and Sydney.

Insights from the 2025 What Directors Think report can help legal leadership take advantage of the recent leap forward in AI capability – and plot a course for the future.

More than 80 percent of U.S. public company directors report that their organization is taking some type of action around generative AI (genAI), according to the [2025 What Directors Think report](#). In the rapidly evolving landscape of technology, artificial intelligence (AI) has emerged as a pivotal force, reshaping entire industries, business practices and the way we work.

The What Directors Think report, conducted by the Diligent Institute, Corporate Board Member and FTI Consulting, is your annual first look into the top priorities and challenges on the minds of the most prominent directors of public companies in the United States. This article delves into the key AI-related findings from the report and explores how genAI is being integrated on a company-wide level. We will also examine the specific implications and use cases of genAI for general counsel (GC), drawing on insights from subject-matter experts.

How Are Directors Feeling About genAI? Insights From the Diligent Institute, Revealed

The report highlights several significant opportunities and challenges associated with genAI. Directors are increasingly recognizing the potential to optimize operations and reduce costs, with 42 percent of respondents citing these as key benefits of incorporating genAI. Similarly, 42 percent see it as a means of enhancing workforce productivity.

Notably, not a single surveyed director believed that there were no opportunities. These findings underscore the growing importance of AI in driving business efficiency and innovation.

Around which function do you see the biggest opportunities with AI/generative AI?



However, the report also identifies several risks that must be addressed. A notable 32 percent of directors expressed concerns about a lack of internal capabilities and knowledge among their leadership teams. Data privacy concerns are another significant issue, with 29 percent of respondents highlighting this risk. Additionally, 26 percent are wary of the potential for false information, which can have serious legal and reputational consequences.

What do you view as the top two biggest risks of businesses using Generative AI?



In terms of actions, 44 percent of boards have already incorporated AI into their business strategies, while 37 percent have designated responsibility for AI discussions to the chief technology officer, chief information officer, chief information security officer or another senior leader. These findings suggest that the GC should play a crucial role in ensuring that AI strategies align with legal and

regulatory compliance, managing risks and fostering a responsible and ethical approach to AI integration.

What action has your board taken or is considering taking with regard to AI/generative AI?

Respondents were asked to select all that apply.



How Are Companies Using AI?

The findings from What Directors Think align to what we've been hearing anecdotally: [GenAI is being integrated on a company-wide level](#) in diverse and innovative ways. According to our subject-matter experts, digital native companies are leveraging AI to drive product development and decision-making. For instance, AI is being used for dynamic pricing, smart suggestions and personalized search rankings, enhancing the user experience and driving revenue growth. These companies are at the forefront of AI innovation, using the technology to stay ahead of the competition.

Sophia Velastegui, a renowned advisor on AI business strategy with experiences at Microsoft, Google and Apple, touches on the unique position of digital native companies in a [recent episode of Diligent's Corporate Director Podcast](#). "Digital native companies are already deeply integrated with AI, and they are using it to drive innovation and stay competitive," she says. "They are more

likely to have the infrastructure and culture to support AI adoption.”

Non-digital native companies are also embracing AI, albeit with a focus on operational efficiency and cost reduction. These companies are often starting with smaller, more manageable AI projects to build confidence and expertise. “They are focusing on areas like supply chain optimization and demand prediction,” Velastegui notes.

AI Implications and Use Cases for the GC

[GenAI offers a range of capabilities that can significantly enhance the work of general counsel.](#) One of the most notable applications is in document drafting. AI can draft initial versions of legal documents, which can then be reviewed and refined by human lawyers. This not only increases efficiency but also allows lawyers to focus on more strategic and high-value tasks.

Cecilia Ziniti, founder of GC AI and a pioneer in the field of artificial intelligence for legal work, discusses the significant impact of genAI on the legal profession [in a recent episode of Diligent’s Corporate Director Podcast](#). “Generative AI can enhance legal work, such as drafting and analysis, in ways that previous legal technologies have not,” she says. “It can provide a ‘wow’ moment, similar to the introduction of the iPhone.”

Velastegui provides another example in [compliance monitoring and control mapping](#): “AI can monitor compliance with regulations and flag potential violations, ensuring that the company remains in good standing with regulatory bodies.” This application of AI can help general counsel stay ahead of regulatory changes and ensure that the company is in compliance with all relevant laws and regulations.

Ethical, Legal and Regulatory Considerations

The integration of genAI in the legal profession raises several ethical and legal considerations. GCs must ensure that AI systems are transparent and explainable, allowing for accountability and trust. They should also be aware of the potential for bias in AI systems and take steps to mitigate this risk.

This includes using diverse data sets for training AI models and implementing robust verification processes.

It is essential for GCs to approach the integration of genAI with caution. Understanding the capabilities and limitations of AI is crucial. “Legal professionals should approach AI with caution and critical thinking, much like they would with any new technology,” Ziniti advises. “They should start by trying the technology themselves to understand its capabilities and limitations.”

Ziniti also emphasizes the importance of the ethical use of AI: “GCs must be diligent and zealous in representing their clients, and the use of AI should support these responsibilities. They should be aware of the risks associated with AI, such as the potential for generating incorrect or misleading information and take proactive steps to mitigate these risks.” This includes maintaining a

“It is crucial to ensure that AI systems are trained on diverse data and that a cross-functional team is involved in AI governance to manage risks and ensure ethical use.” – Sophia Velastegui, AI expert

human oversight component to ensure the integrity of AI-generated outputs.

[Training and education about AI are also vital](#). GCs should stay informed about the latest developments in AI and seek training to better understand how to use these tools effectively. Encouraging a balanced view within the organization is equally important, ensuring that the opportunities presented by AI are not overshadowed by an overemphasis on risks.

Meanwhile, the regulatory environment surrounding genAI is changing constantly, and [regulations differ vastly by jurisdiction](#). In the United States, we have seen a decentralized approach with state-level regulations (see [California](#) and [Colorado](#)). The [EU AI Act](#), which reaches across all 27 European Union member nations, outlines levels of AI risk, lays out transparency obligations for AI providers, and sets up compliance and monitoring protocols. [Additional regulatory activity](#) has been developing in countries around the world in Asia, the Middle East and Latin America.

Best practices for incorporating genAI

To effectively incorporate genAI into a legal practice, GCs should follow several best practices:

1. **Start with a clear understanding of the specific legal tasks that can benefit from AI.** This involves identifying areas where AI can enhance efficiency and accuracy, such as document drafting, legal research and compliance monitoring. “Start with a clear understanding of the specific legal tasks that can benefit from AI,” Velastegui advises. “Identify areas where AI can enhance efficiency and accuracy and ensure that the technology is aligned with your legal and ethical

standards.” This strategic approach can help general counsel maximize the benefits of AI while minimizing potential risks.

2. **Ensure that your AI tools are [specifically designed for your organization](#).** Companies need AI that is trained on their own unique data, so that the information they get from their AI system is relevant, accurate and private.
3. **Prioritize transparency and explainability in AI systems.** This involves ensuring that AI-generated outputs are clear and understandable, and that the decision-making processes of AI systems are transparent.
4. **Implement robust verification processes to ensure the accuracy and reliability of AI-generated content.** This includes double-checking AI outputs and maintaining a human oversight component.
5. **[Choose secure and compliant AI solutions](#).** Look for a system with robust encryption protocols, processes for monitoring and testing, and functions based on trusted standards such as the NIST Cybersecurity Framework or ISO 27001.

Future Outlook

The future of genAI in the legal profession is promising. As AI technology continues to evolve, it is likely to become even more sophisticated and capable. GCs will need to stay informed about the latest developments and adapt to ensure that they are providing the best possible service to their clients.

GenAI presents both opportunities and challenges for the GC. Make sure that you have access to the insights and tools you need to effectively leverage this technology to enhance work, improve efficiency and better serve clients. ■

AI made simple: What it means for you



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Epona Pairs With Microsoft 365 and SharePoint to Enhance Document Management Capabilities

Marcel Lang, Epona



Marcel Lang

Marcel Lang is the Co-CEO and co-founder of Epona, a legal technology company delivering Microsoft-based document and email management solutions to corporate legal departments and law firms worldwide since 1993. With more than 20 years of experience, he has led global implementations across Legal, Finance, Energy, and Healthcare sectors, combining deep industry insight with a strong focus on workflow optimization, data-driven strategy, and technology adoption.

Marcel Lang, Co-CEO of Epona, discusses the advantages of using Epona for document management, including greater content control, better security and major cost savings.

CCBJ: What sets Epona apart from its competitors in the document management space?

Marcel Lang: First and foremost, your documents, your emails, all your content, will not exist in an Epona environment. It will always exist in your Microsoft 365 (M365) SharePoint tenant space, under your control. This means you will always have 100 percent control of your content, as it will remain in your environment. That means no vendor lock. This is an enormous difference from all our competitors, and it's the primary reason that 20 percent of the Fortune 100 are already Epona clients. It is also a primary differentiator when it comes to compliance and security, and it make us as different as night and day compared to other content management service providers.

Being in the Microsoft cloud with Epona means you will get compliance, security and records, all as part of the Microsoft compliance center. Contrast that with our competitors, where you will be using their security models, which are partially reliant in some form on Microsoft, but as an externality. The simple answer is that you're going to be better off putting all your content in a Microsoft environment. And that is why corporate entities prefer Epona. It's a one-stop, single-solution platform. Also, when we talk about Teams integration with the Epona solution versus all other competitors, again all your content will exist strictly in the Microsoft platform. Additionally, updates, upgrades and all integrations on the Epona platform are in the Microsoft paradigm, which means you will be using the Microsoft update paradigm versus the alternative paradigms of the other third parties. This is an enormous differentiator.

Lastly, the Epona solution is also significantly more cost-effective than the other solutions. In the Epona paradigm, there is an initial



upfront cost to get set up in the Microsoft tenant, and licensing costs going forward from there. In the other solution sets, you will be paying for storage and other things that add to your costs that are not part of the Epona solution – because, once again, you are storing your content in the Microsoft tenant, which you already pay for. These are some of the major differences between Epona’s solution and all the others.

What do critics say about Epona?

The legacy document management system (DMS) solutions claim that Epona and SharePoint Online lack scalability. While SharePoint did lack this aspect some years ago, I would like to update this claim with some real numbers that will counterstrike this argument: 2 million site collections. That means, for a law firm, a typical design choice would be that each matter is a site collection. Also, you get 25 terabytes per matter, up to 30 million items in a matter (files and folders), up to 500,000 licensed users, storage from the client’s M365 tenant with additional storage available from \$0.20 per gigabyte/monthly, if you want to archive into “cold” storage while still maintaining

all security, compliance, policies and metadata properties in a SharePoint Archive (\$0.05 per GB/monthly). I believe these numbers speak for themselves.

What is next for Epona?

The next phase for Epona is focused on artificial intelligence (AI). The rollout of Microsoft SharePoint Premium is giving Epona the edge over our competitors. Some AI features include autofilling of metadata properties by prompts. Sensitive information prebuilt models are another feature: Among the most important things in a DMS are the permissions. You can set up the permissions based on a matter or client, and of course also based on folders and items. But what about sensitive documents where users just save them into the DMS? For this you can use an AI model to detect certain information and analyze if it’s sensitive enough to classify the item as “sensitive.” As a firm, you can decide yourself what is “sensitive.” Some out-of-the-box examples are of course bank account numbers, credit card info, etc.

Another powerful feature of the DMS is autoprofiling. It’s

very useful to have the right information in the metadata profile without having to ask users for it. Out of the box, you can create your own models and decide what to extract.

Our prebuilt models use optical character recognition combined with deep learning models to identify and extract predefined text and data fields common to specific document types. Just to mention a few examples:

- **Contracts.** The *contracts prebuilt model* analyzes and extracts key information from contract documents. This model analyzes contracts in various formats and extracts key contract information, such as client name and address, contract duration and renewal date.
- **Invoices.** The *invoices prebuilt model* analyzes and extracts key information from sales invoices. The application programming interface (API) analyzes invoices in various formats and [extracts key invoice information](#) such as customer name, billing address, due date and amount due.
- **Receipts.** The *receipts prebuilt model* analyzes and extracts key information from sales receipts. The API analyzes printed and handwritten receipts and [extracts key receipt information](#) such as merchant name, merchant phone number, transaction date, tax and transaction total.
- **Sensitive information.** The *sensitive information prebuilt model* analyzes, detects and extracts key information from documents. The API analyzes documents in various formats and [detects and extracts key sensitive information](#), such as personal and financial identification numbers, physical addresses, email addresses and phone numbers.

The *unstructured document processing model* (formerly known as *document understanding model*) uses AI to process documents. These documents must have text that can be identified based on phrases or patterns. The identified text designates both the type of file it is (its classification) and what you'd like to extract (its extractors).

Add [classifiers](#) and [extractors](#) to your unstructured document processing models to do the following actions:

Classifiers are used to identify and classify documents that are uploaded to the document library. For example, a classifier can be "trained" to identify all *contract renewal* documents that are uploaded to the library. The contract renewal content type is defined by you when you create your classifier.

Extractors pull information from these documents. For example, for each contract renewal document identified in your document library, columns will display the *service start date* and *client* for each document.

Then we also feature Copilot agents. With Copilot and your DMS inside the M365 cloud, you can imagine that the data used will be everything inside your tenant, including emails, calendars, chats and of course documents. This is not always what you want, as sometimes you want to ask questions about curated data such as a KnowHow repository or a matter. Microsoft released Copilot agents where you (or a user) can select the files or matter and create a Copilot agent. This will result in Copilot only using that data to answer your questions or do tasks.

This is only the beginning of how Epona and Microsoft will elevate your DMS solution. ■

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Top 5 Workflows to Optimize Legal Operations in 2025

Alaura Jacobs, Mitratesch



Alaura Jacobs

Alaura Jacobs is Senior Product Marketing Manager for Corporate Legal Solutions at Mitratesch, where she leads go-to-market strategy, messaging, and positioning for a portfolio of legal technology solutions. With deep expertise in digital transformation and SaaS marketing, she drives initiatives that connect product innovation to client value. Jacobs plays a key role in market research, competitive intelligence, and customer advocacy, shaping product strategy and enabling successful adoption across corporate legal departments.

Not all workflows are created equal, but prioritizing the right ones can cut costs while improving compliance and efficiency.

Technology options for legal teams are endless, and the application of technology can be daunting. As teams manage workloads, business goals and ad-hoc requests, technology must support the business without becoming a burden itself.

[Workflow Automation Solutions, Like Mitratesch TAP](#), streamline routine tasks, approvals and data integration – without the heavy lifting.

While “workflow” can take many forms – such as setting automated filters in your email, for example – not all workflows are created equal. Legal teams can benefit from implementing workflows designed to meet their need for security, permissions and integrations with existing tech they use daily (like matter management, e-billing and e-signature tools, Salesforce, Teams, Slack and more).

If your 2025 goals include setting up technology quickly, driving adoption and creating a few champions along the way, here are five workflows you should be implementing for immediate impact.

1) Commercial Legal Requests

A legal request portal or “[Front Door](#)” streamlines intake, tracking, triage and self-service of sales-related legal requests.

Why create this workflow? Quickly deploy preapproved contracts like nondisclosure agreements or legal FAQs, directing requests to workflows instead of your inbox. Improved visibility into status and assignees reduces deal cycle times and positions legal as a strategic partner, not a bottleneck.

What’s inside: To drive adoption, this workflow can be embedded in an email, intranet, Slackbot or directly in Salesforce. Inside,



logic dynamically routes requests based on department, amount, urgency and other criteria. Integration with e-signature tools routes preapproved contracts without manual intervention.

TAP tip: In your first version, include an “all other requests” option with an open text field. This helps track ad hoc requests, which can later be analyzed for common patterns and automated in future workflows.

“The transition from email and paper to a self-service digital portal was seamless. It took 28 days for us to go live with the legal request portal that now contains 10 workflows for our most common request types.” –Director, Legal Operations

2) Vendor Intake and Invoice Reviews

While sales teams send invoices, other departments receive them – for contractors, vendors, technology, and partnerships. A vendor onboarding and invoice review workflow automates evaluation, approval and compliance management.

Why create this workflow? Each agreement requires different levels of vetting – some need only department sign-off, while others require legal, information technology (IT), or security review before reaching finance. Regardless of their complexity, routing all agreements through a workflow ensures that they are stored in a central repository or integrated with vendor management systems. Plus, a structured process makes it easy to review, consolidate and optimize investments by identifying overlapping services.

TAP tip: The workflow doesn’t have to end with payment. Renewal or review reminders can be configured for dynamic time frames or specific dates, with notifications including key agreement details. This creates a proactive negotiation and renewal process.

“Adopting workflow automation got us closer to our internal corporate partners, so we understood their processes and their pain points. It created so much efficiency so quickly that legal ops looked like real innovators.” –Director, Legal Operations

3) Outside Counsel Conflict Waivers

Conflict waivers are the first step in establishing a successful relationship with a law firm. This process should be smooth and efficient, allowing both teams to begin work quickly.

Why create this workflow? Ensure timely reviews and approvals, maintain compliance and improve collaboration with law firms. The workflow captures necessary conflict details, routes them for approvals and logs all actions for easy auditing.

TAP tip: Choose a workflow technology that allows external parties to participate as users or submit forms anonymously. This streamlines adoption without adding costs or requiring time-consuming license setup.

“Conflict waivers went from 35 days to 3.5 days – a time reduction of 85 percent. Not only did this decrease time spent – it also created better relationships with firms, as they could start work in a week instead of a month later.”
–Director, Legal Operations

4) Trademark and Intellectual Property Requests

Trademark, intellectual property and patent requests are essential for protecting products, maintaining a competitive edge and ensuring that rights are upheld in the marketplace.

Why create this workflow? Streamline approvals, filings and renewals to ensure efficiency. Requestors complete an easy-to-use form, and the data is sent to your matter management system for processing and storage.

What’s inside: Conditional logic can reroute or reject

submissions if key steps – such as a trademark search or asset creation – haven’t been completed, reducing back-and-forth. Collaboration features allow teams to refine and discuss requests without leaving the workflow.

5) Employee Onboarding

A seamless onboarding experience sets the tone for success. Onboarding workflows manage tasks outside of traditional human resources functions, including hardware/software setup, policy acknowledgments, training and role-specific activities.

Why create this workflow? While human resources handle core onboarding, legal can benefit from the automation, compliance and potential cost-sharing that comes with interdepartmental workflows. Plus, seamless onboarding of new legal team members means they can hit the ground running.

TAP tip: Set up parallel routing so that IT, hiring managers, and others can complete tasks simultaneously, which keeps the process moving.

“We had a paper onboarding form that all new employees had to fill out, sign, scan and then submit. I had to approve, then print it out and scan it back in to send it to IT for a ticket. So, that’s the first process we put into TAP, and we had it in production within two days – it was that simple.”
–Manager, Legal Operations

By automating these five processes, legal teams can achieve cost savings, compliance and efficiency. They also drive user adoption through easy-to-use technology, strengthen cross-functional collaboration and foster innovation in legal operations. ■

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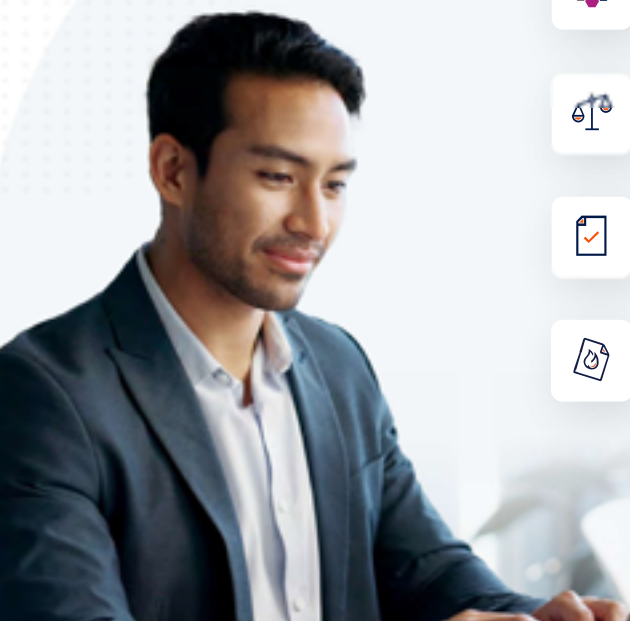
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Analytics



Workflow
Automation



Legal Hold
Technology



After Years of Unrealized Promise, AI Stands Poised to Revolutionize Arbitration

Diana Didia, American Arbitration Association®



Diana Didia

Diana Didia serves as Senior Vice President and Chief Information and Innovation Officer at the American Arbitration Association-International Centre for Dispute Resolution (AAA-ICDR). She brings deep expertise in technology, innovation, and organizational transformation, overseeing IT, HR, and corporate services. A driving force behind the AAAi Lab, she leads efforts to integrate AI and emerging technologies into dispute resolution processes.

CCBJ: Let's start out with a little bit about yourself.

Diana Didia: I am the chief innovation and information officer for the American Arbitration Association. In this role, I'm responsible for not just software development and product management but also ideation and idea pipeline management, which I think is fabulous because I get to see things through from beginning to end. I have been with the AAA for about 13 years, but I've been in the technology space for more than 30 years, including working as a programmer, business analyst and project manager.

Has your role at AAA changed since the emergence of new technologies such as artificial intelligence (AI)? Have you seen any unexpected opportunities emerging because of these advancements?

The technological advancements we have adopted since I've been at AAA have traditionally focused on back-office processes. We were looking for efficiencies, enhanced reliability and improved cybersecurity protections. And moving to the cloud, another significant initiative for us, has given us a lot more flexibility and scalability, allowing us to move quickly to provide innovations and help drive business objectives. While impactful, these advancements were not necessarily transformative. However, the latest generation of AI has been a game changer.

Case management is a pipeline. A case comes in at the front end, and we're moving it from A to B to C to D. We'd already taken advantage of different techniques to automate the process and assist the humans involved as much as possible. But we got to a point where we were trying to take unstructured information – for example, if a filing was a drag-and-drop of a long document – and make it structured. This requires a lot of human effort on our end to pull that information out of the document and type it into cells so that it can be structured and then acted on and moved forward in the pipeline.

So, about five years ago, we tried applying an early version of AI technology to this situation. It was called robotic process

automation (RPA), and it had promise but turned out to be a money pit. We had to do tons of training to try to get the AI to understand what it was looking at and then pull out the right information. We were investing tons of time, energy and resources and were not really getting a significant return on investment.

In contrast, what's fascinating about this new generation of artificial intelligence, known as generative AI or gen AI, is that it reads a document like a human, which is transformative. It can read the filing documents with hardly any training, and you tell the AI via a prompt to pull out the pieces of data you want and then take those pieces of information and put them in the right cells. Now you're getting into really transforming the business: there are all sorts of use cases where you have had humans acting on things, but now suddenly, maybe you don't need the human doing it – or certainly the human could have a copilot that would help make them more efficient. Maybe the AI gets it 90 percent of the way, saving X minutes or X hours, and then the human can take it from there. It just became so much easier to take advantage of automation.

Not that there aren't still challenges. This is all brand new, so it's cool, and you can see it working. But there's still a lot of work to do to make sure it's crossed the line in regards to accuracy, reliability and performance. Still, I think the impact is going to be real because it keeps getting better every day.

I've had all the support in the world to take advantage of the latest and greatest advancements around cybersecurity and cloud technology, but this feels different. This feels very business-transformative. And certainly, in the legal space, I think that's what everyone's been hoping for, given the fact that reading comprehension, the analysis of arguments, and those kinds

of things are obviously foundational to the practice of law. This technology is going to do a lot of things very well around a lot of legal use cases.

How have customer needs influenced innovations within the AAA's workflow?

As part of our innovation practice, we've trained all our staff on identifying needs or opportunities for innovation. They are really good at identifying pain points, whether for themselves, like a case management internal step, or an arbitrator's or party's process, and then thinking creatively about how to resolve that. We also have an idea submission portal where we collect ideas from all levels of staff, and those ideas are thoughtfully analyzed. The really interesting large-scale ideas that we think will be significantly impactful are quickly escalated all the way up to the senior vice president level, and we have conversations about their viability and aligning them with our strategy. We listen to the people who interact with our customers every day, and we've trained them to identify areas of frustration or difficulty that customers experience with a product or service and suggest improvements.

We also certainly have avenues to hear from customers directly, whether it's surveys or meetings with our business development staff. In any forum where we are interacting with customers, we welcome their feedback, and because we have a formal innovation process, there's a place to put it. The bar's not high: You learn something, you have a thought, put it in there. We're not trying to make you develop the entire use case and a whole business case at the front end. If you have a good idea, we want to hear it.

Then, as we go along, as part of the innovation process, we do a lot of pilots and beta testing and customer interviews. We conduct customer interviews to get feedback on a



product that might be in flight or to learn whether there is a market for something we might charge for. We do a lot of surveying and inviting customers in to help us test things. And then, after we launch, we do more surveying, or we might do focus groups to get impressions or feedback about how something is being received by the market. So, we have quite a strong and formal product development process and competency across a few teams, mainly the innovation practice, but we also have go-to-market and other marketing functions, all of which have mechanisms to obtain feedback from customers.

As far as using AI to solve specific pain points, right now, it's a lot about enhancing the promise of arbitration, which is about providing expert decision-making and a fast and cost-effective dispute resolution process. We always

have an eye on time and cost for our customers, so we're looking for areas to apply AI where we think things take a long time or where there's a lot of back and forth between us and the case participants. While developing AI tools, we are careful not to overreach and to pick use cases that are most likely to provide reliability, accuracy, transparency and explainability.

Another key area of focus is making complex information more accessible to less sophisticated users. Conversational AI bots or chatbots can understand what a user wants from their message—even if it's written in free text— and utilize natural language processing algorithms to analyze and summarize complex texts and answer user questions in plain English. Not only will chatbots be able to provide answers to frequently asked questions more efficiently,

but also there is an access-to-justice component that's important to the AAA and our President and CEO, Bridget McCormack.

The AAA has launched a series of AI tools, from ClauseBuilder® AI (Beta) to AAAi Panelist Search. Can you talk more specifically about how these tools work and the benefits they bring to clients?

ClauseBuilder AI was a great first AI pilot for us because we already had a popular legacy version but using it could be a little clunky and time-consuming. Say a lawyer would like assistance in writing a clause: There are a lot of options and nuances around what they may want to include in their arbitration clause, and the user would move through the clause-building process clicking radio buttons to indicate their desired options, and in no time could be 15 screens in. The legacy application was concatenating a long string of clause options, leveraging a library of perfected clause snippets. You want the clause to be well-written because the clause affects whether and how the case will proceed. We are the experts in that, so we had a library of perfected clauses, and when the user was clicking these radio buttons, the tool was pulling from that.

I think it was a staff member who said, "It would be so much easier if you could just say in a chat UX, 'I would like an arbitration clause that has a tribunal, and that's specific to this jurisdiction and all the other options I want,' and have it just create the clause for me on one screen in one step, and maybe I iterate a little bit in plain English language, and it produces my perfect desired clause."

Beyond the business value, a technical reason ClauseBuilder AI was a great first AI project for us was that we were able to compare it against and limit it to the very small data set of our perfected clause language. Using a

small, well-defined data set gave us a clear benchmark for evaluation and reduced the risk of its providing incorrect information while still providing valuable insights into building these types of tools. Many companies make the mistake of immediately tackling large-scale, complex use cases, but this limited approach helped us learn critical lessons before expanding further.

For AAAi Panelist Search, we used AI to improve arbitrator selection. The historical way AAA case managers have done that is that an arbitrator submits their resume, and it gets coded in some way – e.g., this arbitrator gets 10 tags, such as they're based in New York, they have expertise in healthcare, etc. The coding gets more granular, but the searching is basically limited to that. Then what often happens is that, even though you're trying to be very surgical to find "the one," your query returns 50 hits and thus begins the tedious process of reviewing every resume.

With AI, there's a promise that we can be much more surgical, with our goal being to expedite the selection of an arbitrator and to give the customers a list with the best arbitrator choices we have to offer for this specific case. AI can more easily read the whole resume. You do not have to put a human in the middle to interpret and then pick from a limited set of codes, which is what leads to the return of so many resumes. And AI will also discern like a human. It can go through a pile of resumes and say, "Here are the top five." It will make that step in our process so much more efficient.

In addition to these two products, we apply AI to other areas where case managers, arbitrators or parties face time-consuming or repetitive tasks. We've already done some things around automating a scheduling order where arbitrators can opt to have AAA take, with the parties' permission, a Zoom transcription of a preliminary hearing

where they're working through the scheduling order and then use AI to generate a draft scheduling order for the arbitrator's review. Some of our arbitrators have told us that they can save as much as an hour by getting a scheduling order that is almost complete and then editing it. So, while there's still a human-in-the-loop to ensure accuracy, the AI-generated draft has given them a huge head start.

Can you talk about the metrics and benchmarks the AAA uses to evaluate the success of its AI tools, and the efforts you put into continuous improvement and relevance in this rapidly evolving field?

That's an interesting question because at a lot of the tech seminars I go to, there's a general perception that things are moving so quickly that you may start on something one way and the very next week, there's a better way to do it. So, folks working in industries that are not expecting AI to be particularly disruptive may decide to slow-roll experimentation. But we're not in that situation. We're sprinting. We're all in. It's a critical strategic project for us.

How do we keep up with the latest in AI? Our primary product pipeline is filled with AI-enabled deliveries. Our current strategic plan has AI peppered all over it. We have a dedicated team, we're hiring machine-learning experts and data scientists, and we talk about AI in every senior meeting. We're in the early stages of creating a formal AI governance framework and policies and processes related to how we operationalize AI models so that there's a feedback loop and we can be confident that a product we've tested for accuracy, fairness and transparency continues to meet quality standards.

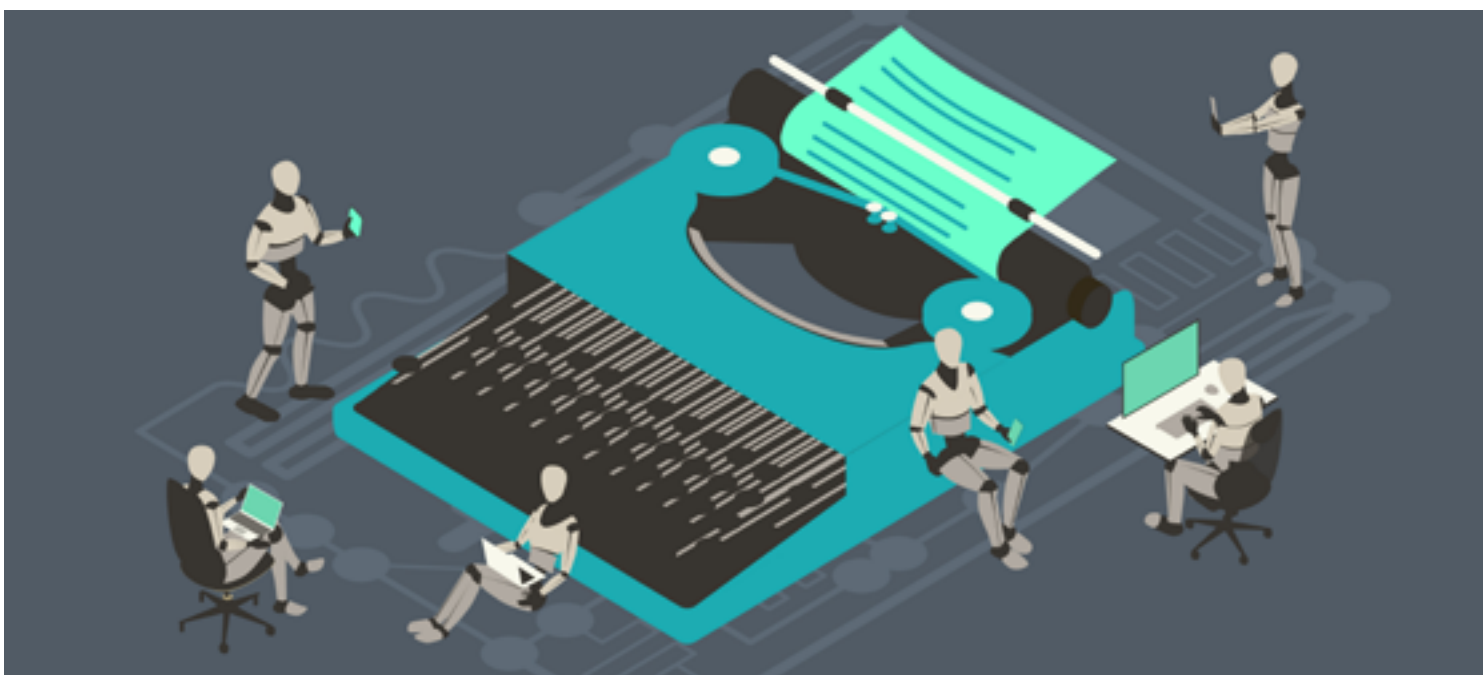
We're driven by a belief that if we don't jump on this, we may not be a company in the future because someone

else will be the first to market with an AI-native dispute resolution solution. We are constantly surveying what the latest advancements are and the vendors that are popping up because we don't want to build something from scratch if someone else has already built it. At the moment, it's all a very intensive organizational process, especially when deciding when something is ready to launch. But long-term it's not sustainable to have too many people involved in the beta phase of every AI advancement.

The ability to effectively operationalize AI governance also depends on the related ecosystem of emerging technologies. On the one hand, you've got the OpenAIs of the world that are creating the models, and on the other, there's a whole slew of startups creating various technologies to help monitor the accuracy of models, the uptime and cost of running them, etc., and we are surveying all that as well. It really feels like riding the wave. There isn't one right way to do all this, and anyone who says otherwise is not really in the know. Lastly, governance is going to evolve along with the advancements, and it will probably take a few years before we can identify best-in-class tools or not have a bunch of people babysitting something.

What advice would you give to other legal companies aiming to introduce AI-driven tools?

First, you need your IT team to build products, so surfacing potential AI use cases is critical. Purchasing enterprise ChatGPT licenses is important because you want your staff to be fluent in generative AI, and it's also important to have a way to collect their ideas. You want to surface the thoughts you crowdsource from within your organization as to the best places to employ this technology, and if they're playing with it themselves, even if it's just to write memos and such, they're more likely to have light bulbs go



off as to where it could benefit their customer.

That is out in the field, but as to your IT team working with these models and building products, my main advice is: Don't try to boil the ocean. Start with narrow use cases and small data sets, like creating rule sets for a chatbot that's going to read documents and answer questions (like FAQs) for your customers. That's basic but important because things are moving quickly, and it's a whole new discipline for technologists. So, on the one hand, you've got Silicon Valley inventing all this stuff, and on the other, your average programmers whose job is to learn how to take advantage of all the techniques needed to leverage generative AI and AI in your product.

If your IT team isn't doing this, they need to get cracking because everyone else is going to be doing it. And with new versions coming out fast, it's going to be harder and

harder to play catchup. Also, you'd rather home-grow your experts because it's going to get very expensive to hire people off the street.

For our part, we're looking at digitizing arbitration more fully. These tools are starting to look like they could reason out an award. We're not suggesting that AI will replace arbitrators, but certainly, an AI copilot could assist with early case evaluation, maybe even driving parties into mediation or settlement by giving them a better sense of the merits of their claim. That's where you're getting into the actual arbitral process, and we are all over that. We're trying to envision the future state of arbitration in parallel with rehabbing and embedding AI into our main case management system. So, it's like running the existing business while trying to build a new model. We're up for it, and we're investing in it, which will make for a busy and very exciting 2025. ■

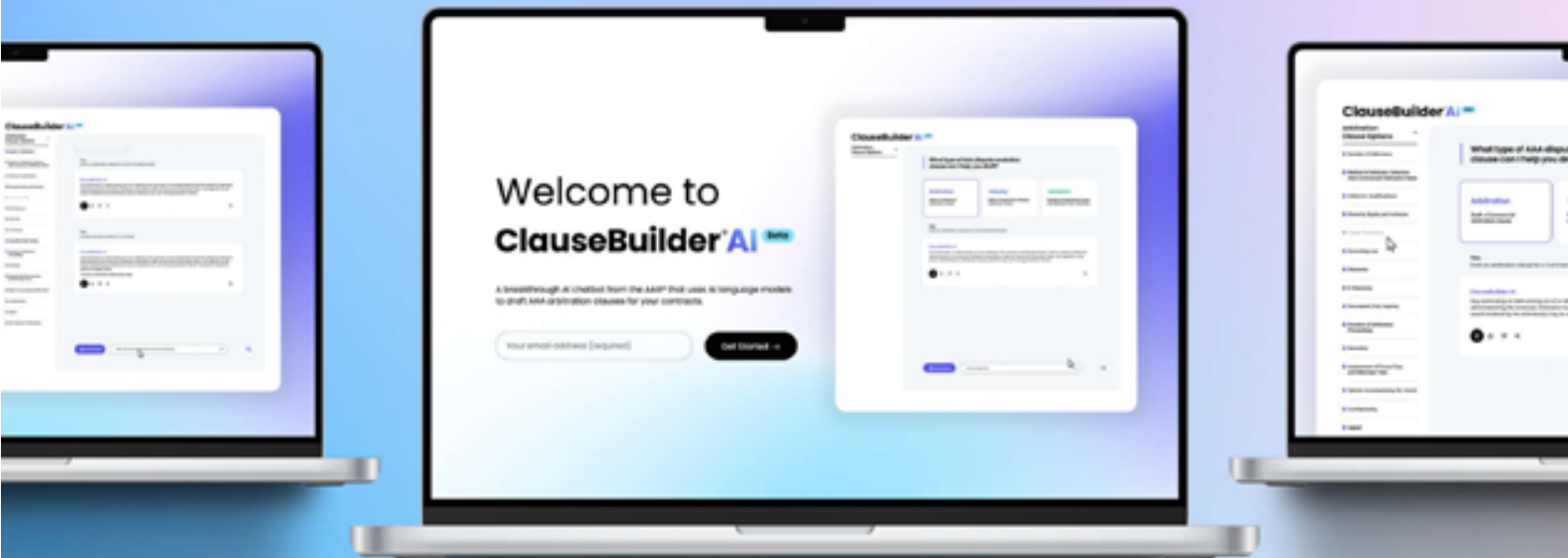


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Speed and Precision: AI in Legal Operations

Matt Lung, LexisNexis



Matt Lung

Matthew Lung serves as Director and Senior Corporate Counsel at LexisNexis, where he leads legal support for complex commercial transactions, technology deals, and strategic partnerships. His expertise spans corporate law, SaaS agreements, data privacy, intellectual property, and risk management. With a strong focus on enabling business growth while mitigating legal risk, he plays a critical role in advancing LexisNexis' global legal and innovation objectives.

Matt Lung, head of legal, global technology and legal operations for LexisNexis, discusses the many ways generative AI can enhance research, drafting and risk management across the legal department.

CCBJ: With legal teams facing increasing pressure to do more with less, how does artificial intelligence (AI) – specifically generative AI – help alleviate those challenges and enhance efficiency?

Matt Lung: With generative AI, the phrase I like to use is “force multiplier.” It can help you get started and generate momentum, and it has parallel workflows that allow the lawyers to work in tandem with the generative AI tools, which helps them be more efficient. Automated document drafting is an example. You can have the AI draft the initial versions of your templates, so that you have a head start and can spend less time on manual drafting. It can also look at the previous language you’ve used to ensure that you’re being consistent across all your templates.

Let’s say I have about 200 cases that I’m handling simultaneously. How can I possibly draft anything that summarizes what’s going on in all of them without spending two weeks working on it? Well, you get a head start with generative AI. It can take that massive set of data and turn it into a concise summary, highlighting the key points. Then you’re not spending all that time trying to pull the data together.

Or let’s say you have a meeting with your internal stakeholders. You’re not an expert on everything, but you need to have an informed basis for the conversation, and you can get that with legal research tools and AI tools. It doesn’t just tell you that a case is relevant. It drafts an initial memo for you, almost like a first-year lawyer would.

All these things can help an in-house lawyer who’s facing challenges from a variety of perspectives, with everybody wanting a piece of their time. Leveraging generative AI to give you that first draft,

to give you that summarization, to give you that legal research – it really increases efficiency.

Talk to us about which legal tasks benefit the most from generative AI, and how does this technology transform the speed and effectiveness of legal operations overall?

You want to start with what generative AI is really, really strong at, which is summarization and analysis and comparisons of large amounts of text, but also drafting, categorizing and brainstorming. These are all things that generative AI is great at because it can take a massive set of information and consolidate it into a smaller piece of information. The lawyer benefits from the AI's speed, effectively multiplying themselves.

Document review is an obvious one. LexisNexis, for example, has a tool called Create+ that will review the database of your existing contracts and tell you, "This is your standard template, this is your standard language, this is what's been agreed upon." It can process an incoming contract and say, "This is inconsistent with your internal position. Here's the clause that you always use." So, as a lawyer, particularly if you're a new lawyer, rather than coming in with a blank slate and trying to understand, "What is our corporate position?" you're immediately leveraging all that knowledge from every lawyer that's been there before you, every deal that you've ever done.

Legal research, which I mentioned earlier, is another important one. You can't possibly know everything about every legal issue that you're going to face. When you are asked a question by your client, you usually have very little time to give them an answer. But now you have the ability to get up to speed rapidly, and not just by having the research done, but even an initial memo, in a format you like, to get you started in terms of understanding the issue

or having an initial conversation with your client, or as you get you prepared to have an informed conversation with your outside counsel or an outside expert.

These are things that in the past would've taken a lot of time, or maybe you would have had an outside counsel draft the memo for you and you'd get it back a couple of days later. Now you have generative AI behind you, giving you that push, that head start. You can react much quicker than you would

have been able to in the past. If you have a litigation-heavy practice, you can summarize and chronologize the documents as they come in. You can compare deposition transcripts to what the evidence shows. You can get a handle on what your legal exposure to some issue really is, not based on your gut feeling, but based on an analysis of what the company has done for the past 20 years in cases like this. And you can be specific: What is it like when you're in this jurisdiction or in front of this judge, with this plaintiff's lawyer, with this defense lawyer?

Being able to pull that information together, from such a variety of sources, and then consolidate it into something understandable in a short time frame will help you be more efficient in determining your litigation strategy and expenditure.

When you revise your contracts with generative AI, you may find that now you're signing 60 or 70 percent of your contracts unchanged.

Excellent. So, how does AI enhance the drafting process, and what measurable improvements does it bring to legal department workflows?

Perhaps the biggest thing it does to enhance the drafting process is help you be less lawyerly, if that makes sense. Many lawyers repeat the same clauses as they write, but if you look at a contract 20 years later, it's kind of this cut-and-paste mishmash of the past 20 years of legalese. Sometimes it doesn't really make a whole lot of sense, because it was written at different times, and definitions have started to shift a bit and it doesn't flow very well.

Because generative AI does a good job of reviewing and revising and suggesting changes, both for compliance with changes in the law but also in terms of style, it's a wonderful place to start with the drafting process – whether it's “make this simpler, make this shorter, address

this issue that I've been hearing about from my customers for the past six months” or whatever. Let's just say a clause is not well written for some reason. You can have it make a suggestion that fixes the issue, and as you fix the issues in your contracts, as you make them clearer and get fewer redlines back, you're being more efficient in your contracting. The more contracts you can send out and have signed without having to negotiate, without having to get on the phone to work through some issue, the better off you are. That's one way it can enhance the drafting process – by looking not just at your positions but also at what feedback you're getting from your counterparties when you're negotiating.

Another thing AI can do to enhance the drafting process is leverage your current knowledge base across those various silos that we've all entered into in one way or another, particularly as we've become more geographically spread out in this new world of remote or hybrid working. How do I know what my lawyer in Los Angeles has done to resolve this clause? How do I know what my lawyer in the United Kingdom has done to resolve this clause? How do I know what someone who was here five years ago but has since left did to resolve this issue? The amount of volume is unimaginable. But with AI, you can investigate those contracts. You can reference them as a grounding source of truth, knowing that this is what we do, these are our templates. This is a solution that Janice in Los Angeles had just last week. I haven't had a chance to talk to her, but I can still benefit from that language because the AI tool can look at the contracts she's done. It can pull that clause out and suggest it to me as a solution to my problem. Those are the kinds of measurable improvements that you're going to see more and more of down the road.

Another measurable improvement is just in terms of contract turnaround time. As you look at your contracts



and see that a particular clause is a constant point of negotiation or presents some type of issue that your counterparties are consistently raising, you can ask generative AI to revise that clause. Once it knows that the questions or concerns that have been raised about the clause revolve around X – this issue or that – it can revise the clause to address the concerns in compliance with your policies. It can solve those issues.

Once you do that, the next time you send that contract out, that clause doesn't get redlined anymore. So, maybe in the past it took four days to be signed, and now it takes two or three days. As you leverage that across all your contract templates, across your company, it adds up. Every 60 minutes that a lawyer isn't looking at the contract on the other side or redlining it and sending it back – that adds up across the entire legal team and makes the turnaround time for your contracts much, much quicker.

It all adds up. Even five minutes a day per lawyer across a legal team of 20 people, over a period of a year, adds up. Then also, consider those deals that didn't get closed because you ran out of time because your contract wasn't negotiable: When you revise your contracts with generative AI, even if you're just explaining things better and not necessarily changing the risk positions at all, you may find that all of a sudden you're signing 60 or 70 percent of your contracts unchanged, as opposed to just 30 or 40 percent. That's a big difference because now you're processing more and more contracts. Your revenues go up. It is a win-win for everybody.

That's great. You mentioned that AI doesn't necessarily need to even address risk positions to be valuable, but it can help with that too. So, what are some effective ways generative AI can help identify and mitigate legal risks within a corporate setting?

Many companies have vast databases of executed contracts that they have simply been renewing for years without any visibility into what they truly say. In the past, that felt like a hole that was too big get out of if you ever did jump into it. So, companies just internalized that risk and moved forward. But with generative AI, instead of having to hire a team of lawyers to go through every contract line by line, you can use generative AI on it. You can have it review and summarize this massive set of your contracts, with a set of ground rules – like look for contracts that have this provision or are in this jurisdiction or have unlimited liability, whatever it is you're trying to isolate or account for.

You can now get that first cut done by generative AI, which can flag the outliers for a lawyer to review, and now your legal team is looking at hundreds of contracts, instead of tens of thousands of contracts. Now you're in a position to really ask, "What is the issue with this contract? What can we do to renegotiate it or amend it, or do we need to terminate it?" You're mitigating corporate risk that had always existed but you just hadn't stepped on it yet. But now you have a chance to avoid that risk or close that compliance gap, because now you know it's there and you were actually able to find it.

That's something that you would not have had the time to do in the past, because you would have had to sit there and go through everything, page by page. But generative AI does a much better job of that, and obviously much quicker. Then you add a human lawyer to the loop, but they're looking at a much smaller data set.

Let's keep in mind that, yes, identifying and mitigating these kinds of existing contractual risks is important in a corporate setting – but the risk of not closing deals to begin with is also real, and I think it's common sometimes

in the in-house world for people to forget that. This gets back to making sure that your contracts are ones that your counterparties will sign, and formatting your contracts in the best possible way, using language that helps explain why a clause is the way it is.

You can also ask generative AI to think about bigger picture risks. Give it your persona. Who are you? Where do you work? What does your business do? Say, for instance, that you are a senior corporate counsel for a legal technology company that sells products in the United States and Canada. Give that info to the AI and ask it what business risks it thinks you might be facing in the next 10 or 15 years.

Say you're operating in six different jurisdictions. The AI can help you identify potential risks that you should do more research on. Literally, you can ask the generative AI to brainstorm with you, and it will go back and forth with you and generate ideas about things you can chase down, things you can focus on, things you can direct your ops team or your compliance team to consider. It can help you look at the big picture and see, "Do we have gaps here?"

How can AI empower in-house counsel to become stronger strategic partners in the business, driving alignment, efficiency and value?

That's a simple one. It allows in-house counsel to spend fewer hours on time-consuming yet necessary work such as summarizing all of your open matters in the state of California or reviewing and amending all of your existing contracts in a jurisdiction that just changed its laws. Every head start you get, every little generative AI push helps free up your time to be that strategic business partner, that value-added partner, where you can really leverage those creative thinking and problem-solving skills that in-house counsel bring to the business team.

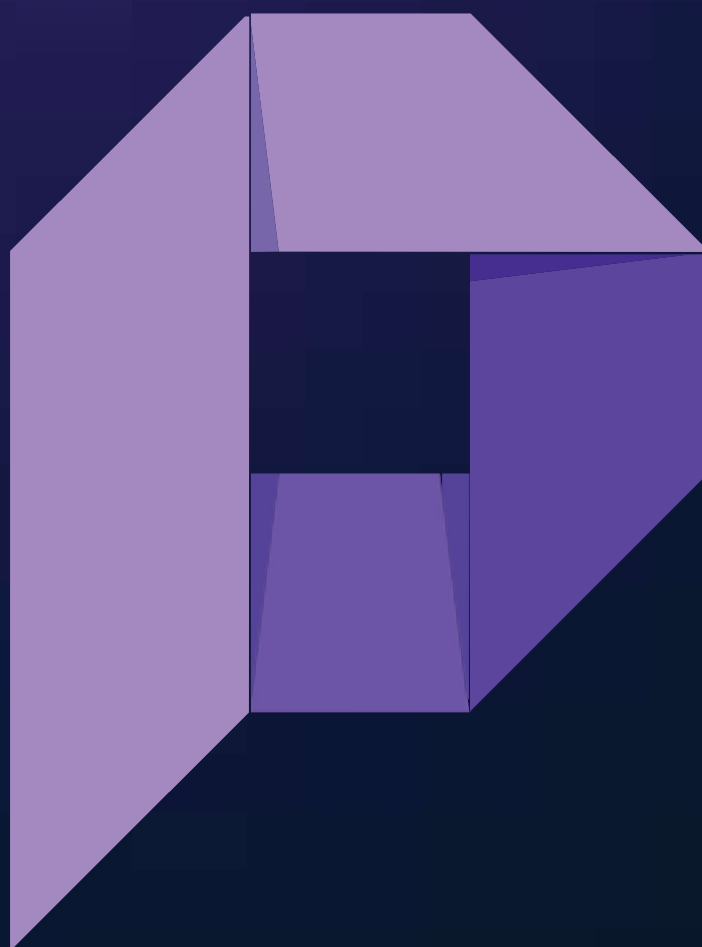
AI can help you position to be viewed as part of the business team, rather than just a legal silo. That's the key to becoming that stronger strategic partner — having the time to align with the business, to work with them and understand what they're doing. You can become that partner when you have the time to spend on it and you're not stuck in routine reviews of thousands of contracts.

Last question. What shifts will AI bring to the relationship between in-house counsel and outside law firms?

I know that some people think that generative AI is going to be the end of lawyering as we know it – or maybe the end of the need for outside counsel. I don't believe either of those things are true. First off, I believe outside counsel will actually benefit from the use of generative AI. In terms of the work outside law firms do for their clients, generative AI is going to move their lawyers up the value chain, which helps them become more strategically important to their corporate clients. Also, internally, AI is going to drive more complicated work toward outside counsel. It's going to free up legal spend for the complicated matters, because it's not being used up on the routine and mundane things that are lower risk, which means the businesses can now get a better handle on things.

Businesses will get a better understanding their existing risk profile because they'll finally be able to truly see the risks that are there – and get a head start on addressing them. Understanding the historical risks that they already carry will allow them to better evaluate legal issues and more accurately scope benefits and risks and determine the need to engage outside counsel. And they'll have the bandwidth to do it. So, I think the generative AI shift will actually benefit both the in-house counsel and their outside law firms by moving everybody up that strategic value chain. ■

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The Future of In-House Legal

Mike Tobias, mot-r



Mike Tobias

Mike Tobias is the Founder & CEO of mot-r, the Work Management System for General Counsel. Mike has led digital transformation and cloud-based product development teams serving the Fortune 500 for more than 30 years, and Legal departments for the past 12 years with an unrelenting focus on reducing the human cost of operational waste, overwork and burnout.

The Challenges Facing In-House Legal Teams

CCBJ: In your tech talk, you mentioned that 71 percent of in-house lawyers are considering leaving their roles. What are the key factors driving this dissatisfaction, and how have successful companies improved retention?

Mike Tobias: The challenges facing in-house legal teams are multifaceted. High workload, constant urgency, and a lack of understanding about the unique role lawyers play within an organization contribute significantly to burnout. In-house counsel must balance being both risk guardians and commercial enablers—a dual responsibility that is often misunderstood.

Moreover, their personality profile and work output differ from other departments, yet they are expected to function within rigid corporate structures. These misalignments create what we call a “doom loop,” where conscientious, high-performing lawyers respond to pressure by working harder. Over time, this unsustainable cycle leads them to burnout and, ultimately, departure.

Companies that successfully improve retention recognize these structural issues and address them through better workflow management, clearer role definitions, and legal technology that genuinely alleviates workload rather than adding to it.

Why Legal Tech Often Fails

With 77 percent of legal tech projects failing, what common mistakes do companies make, and can you share an example of a company that successfully avoided these pitfalls?

The most common mistake is viewing legal tech selection through a traditional IT procurement lens—focusing on feature checklists rather than business outcomes.



In-house legal is distinct in its needs, yet many companies allow IT to lead the selection process without fully understanding how legal teams operate. Over the past few years, we've seen legal tech spending nearly double, yet burnout has worsened. That tells us that more technology isn't the solution—it must be the right technology, implemented correctly.

Another major issue is failing to anticipate change. Businesses constantly evolve—new regulations, management shifts, market fluctuations—and legal tech must be adaptable. The most successful companies take a future-proofing approach, where before commencing a project, they conduct a “pre-mortem.” In this process, they imagine what could go wrong with the project and then work backward to plan ways to avoid potential pitfalls. This proactive mindset helps prevent costly missteps.

So, going into any technology selection process requires you have shared agreement on what business outcomes you are trying to bring about, and what changes to the business you need to be able to easily accommodate.

Adapting to the Future of In-House Legal

As we move into 2025, what major shifts do you see impacting in-house legal teams, and how are they preparing for these changes?

AI is the dominant conversation in legal tech today. While there's excitement and anxiety about its implications, the reality is that foundational challenges remain—retention, workload, and operational inefficiencies. Until these core issues are addressed, AI alone won't be a silver bullet.

However, high-performing legal teams are focusing on first

principles: streamlining workflows, reducing redundant manual tasks, and ensuring their teams are positioned to thrive. The companies that get ahead will be those that integrate AI thoughtfully—augmenting legal teams rather than overwhelming them with another layer of complexity.

The Disconnect Between Legal and Technology

What operational or technological challenges do companies commonly face when they come to you for guidance?

A recurring theme is the realization that document management systems (DMS) alone don't solve operational inefficiencies. While they help with storage, searchability, and security, they don't address operational effectiveness—who is responsible for what, what's pending, what's high priority, etc.

Many legal teams come to us after implementing a DMS,

expecting it to solve their workflow issues, only to find that it doesn't. We help them transition to structured processes, focusing on areas of high impact like contract and matter management. By starting with their biggest pain points, they can progressively enhance their operations rather than trying to overhaul everything at once

AI's Role in Legal Operations

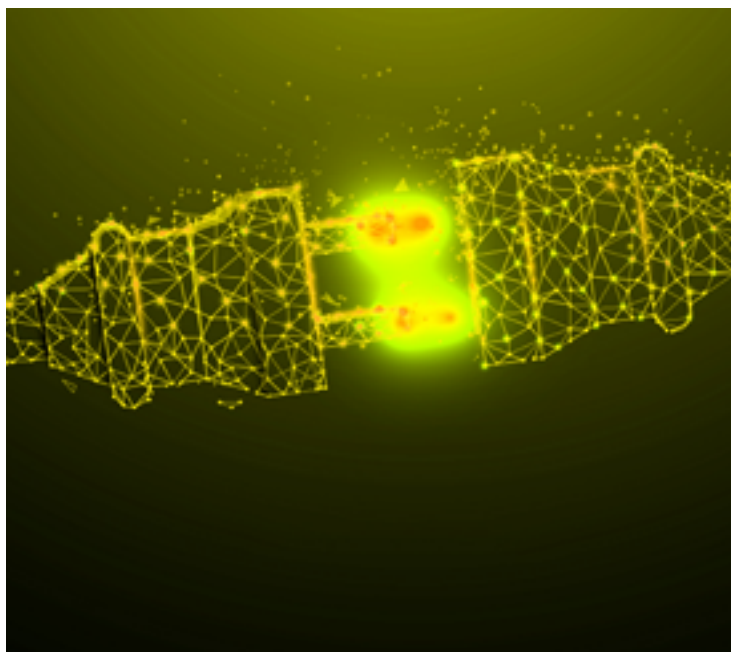
Where is AI currently delivering the most value for in-house legal teams, and what misconceptions still exist?

Right now, AI is proving most effective in document-intensive tasks—summarization, drafting,

and review. However, one of the biggest challenges is adoption speed. AI evolves at a rapid pace, but individuals, organizations, and particularly legal teams adopt it at a much slower rate.

And regulations—that change at a much slower pace than technology and the demands of business—are likely to further impede the adoption and integration of AI into legal work. ■

Going into any technology selection process requires you have shared agreement on what business outcomes you are trying to bring about, and what changes to the business you need to be able to easily accommodate.



Legal Tech That Works the Way Legal Works

Matt DenOuden and Nick Whitehouse, Onit



Matt DenOuden

Matt DenOuden, Chief Evangelist Officer, Onit
Matt DenOuden has more than 30 years of legal industry experience, including a dozen years practicing law as a partner in a boutique defense firm in Hartford, Connecticut. While there, he started and grew an early e-discovery technology practice. In 2002, he left private practice to join a young e-billing company, TyMetrix. As Vice President of Sales for TyMetrix, Inc., for 14 years, he helped take the company from four clients and \$2 million in revenue to 250 clients and \$60 million in revenue.

Onit embeds AI into core legal workflows—like invoice review and risk management—while integrating with tools such as Outlook and Word to support efficient, data-driven operations.

CCBJ: In what ways has Onit’s deep legal expertise influenced the development of its platform and how does this foundation enable the company to deliver smarter, more impactful solutions compared to other legal tech offerings?

Our platform—and the solutions built on it—were designed by lawyers, for lawyers. We have a deep understanding of the intricacies, patterns and workflows that define legal work. This includes not only the operations within the law department itself but also its connections to internal business clients and collaboration with outside counsel.

Because Onit laid the groundwork early by mapping out the full range of legal department workflows, we’ve been able to focus in recent years on making that work easier, smarter, more data-driven and ultimately more impactful to the business.

Describe how Onit adapted its technology to align with the unique workflows and toolsets of modern legal departments and what distinguishes its approach to integration and performance measurement.

Legal departments operate as critical hubs within most businesses, managing a high volume of questions, matters, risks, contracts and compliance issues. Recognizing this complexity, Onit has designed its products to integrate seamlessly with the tools lawyers already rely on—most notably Microsoft Word and Outlook. Through dedicated add-ins, legal professionals can perform their work within these familiar environments while leveraging the power of Onit’s platform.

Additionally, Onit is built with a native understanding of the metrics that matter most to legal teams. It offers out-of-the-box access to commonly used reports, KPIs and benchmarks, enabling legal



Nick Whitehouse

Nick Whitehouse serves as the Chief AI Officer at Onit, where he leads the development and strategic direction of the company's AI initiatives. With a deep background in legal technology and innovation, Nick is focused on operationalizing artificial intelligence in practical, impactful ways for corporate legal departments. Nick is a key advocate for thoughtful, transparent AI adoption, emphasizing the importance of balancing automation with human judgment.

departments to track performance, demonstrate value and drive strategic outcomes with greater ease.

As the role of the General Counsel continues to expand beyond traditional legal oversight, how is legal technology—such as Onit's solutions—enabling GCs to lead strategically, contribute business insights and drive organizational value?

Over the past two decades, General Counsels have evolved from legal advisors to strategic business leaders with full seats at the executive table—and expectations to lead from them. This shift requires GCs to bring the same level of business intelligence and data-driven insight to the C-suite as their peers in finance, operations, or marketing.

Technology platforms like Onit play a critical role in enabling this transformation. By equipping legal departments with tools to capture, analyze and report on key metrics, Onit helps GCs demonstrate not only how legal mitigates risk and controls cost but also how it creates value and contributes to competitive advantage.

Where the Office of the General Counsel was once seen as the “Office of No,” it is increasingly becoming the “Office of Yes and...”—a partner in innovation, growth and strategic decision-making.

How does Onit's unified platform strategy support legal departments in scaling their capabilities and why is a cohesive approach increasingly important in today's fragmented legal tech landscape?

As the legal tech market has matured, it has become increasingly fragmented—filled with highly specialized tools that often operate in isolation. To legal departments, this can feel like navigating a scattered archipelago of disconnected systems, making integration, data sharing and consistent user experiences difficult to achieve.

Onit takes a different approach. Our philosophy aligns more closely with a “Pangea” model: bringing as many legal use cases



and solutions as possible onto a single platform, built on one codebase and delivered through a consistent user interface. This unified approach is not only more intuitive for end users, but it also enables stronger data aggregation, streamlined reporting and more effective AI capabilities—since information resides in one connected ecosystem.

By growing with our customers on a common platform, we help legal departments scale efficiently while avoiding the complexity and inefficiencies of siloed tools.

As artificial intelligence becomes more embedded in legal operations, how is Onit leveraging AI agents to deliver real-world value and in what ways are these tools reshaping the day-to-day work of legal professionals?

The primary benefit of Onit's AI-powered solutions is time savings for legal professionals. Our AI agents—focused on key areas such as Spend, Contracts and soon Matters, Knowledge and Requests—are embedded directly into

existing workflows, generating meaningful outputs as part of day-to-day legal operations.

For example, our Spend Agent automatically reviews invoices against outside counsel guidelines or engagement letters, proactively flagging and disputing non-compliant charges. By automating these routine, time-intensive tasks, Onit enables legal professionals to focus on strategic oversight and higher-value decision-making.

While AI in legal has long generated interest, many solutions have struggled to move beyond compelling demos into real-world utility. Onit's AI agents are different. They consistently perform routine legal tasks at a level comparable to experienced professionals—a capability we've rigorously validated with legal industry experts.

A key advantage of these AI agents is that they reduce the friction commonly associated with traditional software: they require minimal onboarding, offer intuitive interfaces and integrate seamlessly into existing processes. The result

is fast, measurable impact—time savings, reduced costs, improved efficiency and lower risk.

Given the rapid evolution of AI, how can legal departments strike the right balance between leveraging automation for efficiency and preserving the human judgment essential to legal decision-making?

Automation can often feel abstract—or even unsettling. It's easy to get caught up in AI hype and adopt solutions too aggressively, or conversely, resist entirely out of fear that jobs are at risk. In reality, neither extreme reflects what's happening today. AI capabilities have advanced dramatically over the past two years and it's no longer just a feature—it's transformative.

That said, not every use case delivers value and chasing them all can introduce unnecessary cost and risk. Legal departments are already managing more work than capacity allows, so the key is thoughtful oversight.

Organizations should treat AI as they would any team member: give it a clear role, establish standard operating

procedures, define its authority and ensure full transparency. At Onit, our Agent Studio helps legal teams do exactly that—making it easy to configure, monitor and control AI agents while keeping human judgment at the core of legal work.

The shift from the 'Office of No' to the 'Office of Yes, and...' reflects legal's expanding strategic role.

Looking ahead, what excites you most about the evolving role of AI in the legal industry and where do you see the greatest opportunities for meaningful transformation over the next five years?

What excites me most is the emergence of true collaboration between legal professionals and AI agents. We're moving toward a model where AI handles the process of law—those time-consuming, rules-based tasks—while lawyers focus on the higher-value practice of law.

Over the next five years, the biggest opportunities lie in seamlessly embedding AI into everyday legal workflows. This includes managing invoices, automating bill review, triaging internal requests and auditing for risk—routine but essential functions that often drain legal resources without requiring deep strategic input.

By offloading these tasks to intelligent, integrated AI agents, legal departments can operate with greater agility, free up capacity and focus more squarely on strategic decision-making. ■



TAR to HAR: How LLMs Are Ushering in Legal 3.0

Tom Gricks, OpenText



Tom Gricks

Tom Gricks serves as a Strategic Discovery Advisor at OpenText, where he focuses on the practical application of advanced technologies—such as technology-assisted review (TAR) and large language models (LLMs)—in legal discovery. A former trial lawyer with deep experience in e-discovery, he has worked with law firms, corporate legal departments, and service providers to develop defensible and efficient approaches to document review.

OpenText's Tom Gricks reflects on the evolution of technology-assisted review and how large language models are redefining speed, accuracy, and strategy in legal discovery.

Technology-Assisted Review (TAR), also known as predictive coding, revolutionized the legal industry by applying machine learning algorithms to document review processes. TAR 1.0 learn from human reviewer decisions on a control set and then extrapolates those classifications across the entire document population. Second generation TAR, or TAR 2.0, continuously updates its model as documents are reviewed and prioritizes documents for review based on likely relevance. TAR technology has delivered tremendous value to legal teams by dramatically reducing review time and costs—often by 80 percent or more compared to traditional linear review—while simultaneously improving accuracy and consistency. By prioritizing likely relevant documents and minimizing human review of irrelevant materials, TAR has enabled legal teams to meet tight deadlines, control litigation expenses, and focus attorney time on high-value analytical work rather than repetitive document review and categorization. As courts have increasingly recognized TAR's validity and effectiveness, it has become a cornerstone of modern discovery practice, establishing both the technical and legal foundations for the continued evolution of AI in legal document review.

Large Language Models (LLMs) represent the next frontier in legal technology, poised to further transform document review with their sophisticated natural language capabilities. Unlike traditional TAR systems that identify patterns based on features, LLMs are trained on vast bodies of text making them capable of recognizing context, semantic relationships, and conceptual meaning. This deeper understanding allows LLMs to make more accurate classification decisions, especially with complex legal concepts and subtle distinctions that challenge conventional systems. By integrating LLMs into review workflows—whether independently or in conjunction with existing TAR solutions and analytics workflows—legal teams can achieve unprecedented levels of efficiency. As



adoption increases and best practices emerge, these powerful tools will continue to drive down litigation costs while improving outcomes, allowing legal teams to redirect resources from document review and coding to review and analysis of key evidence that will enhance strategic case analysis and client advocacy.

We recently sat down with Tom Gricks, Senior Principal Consultant at OpenText, and head of the OpenText Investigations Service team, to speak to him about his early experience as a pioneer in implementing and validating TAR for document review and his experience in working with clients and their data to test and refine the use of large language models for investigations and document review under OpenText eDiscovery Aviator “Earn Your Wings” program.

CCBJ: To start, please tell us about your background during the early days of TAR review and your experience promoting technology adoption in legal document review.

Right after Judge Peck issued his seminal opinion in *Da Silva Moore*¹, I recognized an opportunity to transform document review through technology. When faced with a two million document collection, I proposed using TAR to dramatically streamline the process. This led to the *Global Aerospace 2* decision that authorized TAR use over objection, a landmark moment for legal technology adoption.

The results were transformative, we saved approximately \$1.8 million on that review alone. This success inspired Karl Schieneman and I to write about Rule 26(g) disclosure responsibilities to establish best practices for this

powerful new capability. While initial adoption faced some hesitation, the legal community increasingly recognizes that technology-assisted review delivers superior results more accurate, more efficient, and more cost-effective than traditional methods. The journey from skepticism to acceptance has prepared the groundwork for each new advancement in legal technology. Today's sophisticated technology solutions build upon these foundations, with each innovation making document review more powerful and accessible to legal teams of all sizes.

At what point did TAR begin to gain broader acceptance in document review? How did influential cases and foundational principles contribute to its adoption?

While Global Aerospace was certainly significant, Judge Peck's decision in *Rio Tinto 3* truly transformed the landscape by establishing that "it is now black-letter law that if a responding party wants to use predictive coding, the courts will allow it." This watershed moment shifted the conversation from whether technology could be used to how it should be implemented, opening the door for continued innovation. This precedent has been invaluable in establishing a framework for evaluating and accepting new technologies. Each advancement builds on this foundation, allowing us to move forward with greater confidence and focus on maximizing benefits rather than debating permissibility.

TAR has been around for years, but more recently, OpenText has been highlighting HAR. What is HAR, and how does it mark an evolution in document review technology?

HAR, or human assisted review, represents an exciting evolution in how legal professionals and technology collaborate. HAR provides a more intuitive and natural partnership between human and machine where, rather

than starting the process by coding documents, legal professionals can communicate their requirements through natural language prompts. While TAR relies on human coding decisions to train the model to recognize responsive document features and build contextual and conceptual recognition into the model, LLMs can recognize subtle patterns and contextual and conceptual relationships between documents from the start because their neural networks are pre-trained on vast data sources.

The work for the human in HAR is to develop prompts that will tell the LLM which contextual and conceptual relationships matter. The system continuously learns from these interactions, becoming increasingly effective at understanding the nuances of each specific review project. This collaborative intelligence approach combines the best of human expertise with the processing power of advanced AI.

Given your longstanding advocacy for technology in legal review, how do you see large language models enhancing review processes? What additional applications do you find particularly compelling?

While I initially approached LLMs with the healthy skepticism any new technology deserves, I've been impressed by their capabilities. Beyond production review, investigations have emerged as an area where LLMs truly shine. They excel at rapidly synthesizing information across large document sets, identifying connections that might otherwise be missed, and providing investigators with valuable starting points for deeper inquiry. This ability to work alongside investigators handling background research while humans focus on critical analysis creates a multiplier effect for legal teams.

What has your experience been so far in using large language models for corporate investigations? What benefits are clients seeing from this technology?

LLMs can enhance human investigation capabilities by serving as powerful research partners that work alongside our team. While we maintain appropriate verification protocols for all AI-generated analysis, the efficiency gains can be substantial. In practice, LLMs create a valuable multiplier effect. As an investigator focuses deeply on one critical issue, inevitable tangential questions arise. Instead of putting these questions aside, we can task an LLM system to explore them concurrently. When the investigator completes their primary analysis, they already have well-structured starting points for the next avenues of inquiry. Even when citations require verification, the LLM's analysis typically points in productive directions, accelerating the investigation process. Corporate clients particularly value how this approach allows us to explore more potential avenues of inquiry within the same timeframe, leading to more comprehensive investigations without increasing costs. This collaborative approach combines the best of human expertise critical thinking, legal judgment, and strategic decision-making with AI's ability to process and synthesize vast amounts of information quickly.

In your work with large language models, how have you approached document classification? What testing strategies have you employed, and what encouraging outcomes have emerged from those efforts?

At OpenText, we have taken a methodical approach to implementing LLMs for document classification, and the results have exceeded our expectations. In one test, we used a ten-page review memo prepared for a document review team as an initial prompt, without any optimization,

and ran it through an LLM to assess classification capabilities against a previously coded control set. The recall results exceeded acceptable judicial standards, and precision matched TAR 1.0 levels, all without any prompt engineering. Most impressively, by controlling LLM parameters, we achieved fully reproducible results at the document level, even when varying the sample composition. What is particularly valuable is how the LLM's also offer reasoning insights that can be used to help refine prompts and further improve performance. This transparency creates a virtuous cycle of continuous improvement in a manner that wasn't possible with earlier technologies. Early results demonstrate the potential of LLMs to transform document review while maintaining the reliability and defensibility that legal work demands.

How are large language models poised to transform traditional document review workflows? What potential do you see in integrating them with legacy technologies such as TAR?

LLM technology is already demonstrating impressive classification capabilities, and as prompt engineering becomes more sophisticated and streamlined, we will see even greater efficiencies. What's particularly exciting is how LLMs and TAR can work together synergistically. For example, you could use an LLM with a well-engineered prompt to identify responsive documents, then leverage TAR's continuous learning capabilities to prioritize documents for review. As the system learns, you can progressively reduce the number of documents requiring full LLM analysis, optimizing both speed and cost. This combined approach represents the best of both worlds TAR's efficiency in ranking and prioritizing documents with the LLM's ability to incorporate both content and context. Together, they create workflows that achieve exceptional recall without processing the entire collection, delivering better results faster and at lower cost. While

new technologies always face adoption hurdles, the legal community's growing comfort with statistical validation puts us in a stronger position for faster acceptance of these powerful new capabilities.

Considering the early phase of genAI implementation, what strategic advice would you offer to corporate counsel facing pressure to adopt LLMs? How can they strike a balance between innovation and risk management?

The most important principle is to view LLMs as powerful tools that enhance your existing processes rather than replacements for sound legal judgment. Focus on incorporating AI capabilities strategically to increase efficiency and effectiveness, not on wholesale transformation. A practical approach is to combine techniques for maximum benefit. For example, use traditional analytics to filter obviously non-responsive documents upfront, then apply LLMs to the reduced document set. Since LLM results are reproducible at the

document level, this automatically increases precision without extensive prompt engineering. This combined workflow delivers results greater than either approach alone.

To manage risk, I recommend starting with lower-risk, high-value use cases like internal investigations where the stakes are manageable but the potential efficiency gains are substantial. This builds organizational confidence and expertise before moving to productions in high-stakes litigation. Remember that validation remains essential regardless of technology.

In light of previous hurdles in legal tech adoption, how do HAR and genAI differ from earlier waves of innovation? Are today's organizations better equipped to embrace these advancements?

We are in a significantly stronger position today for several reasons. The legal community has developed a much deeper understanding and appreciation of statistical validation, a critical foundation for any technology-assisted review process. The validation principles established with TAR provide a robust framework that can be applied to LLM-based approaches as well. At a fundamental level, both TAR and HAR share the same goal: teaching technology to distinguish responsive from non-responsive documents. The specific mechanisms differ, but the objective and success criteria remain consistent. This continuity makes the transition more natural for legal teams already familiar with technology-assisted review. The combination of established validation practices, growing comfort with legal technology, and the enhanced capabilities of LLMs positions us for more rapid and confident adoption than we saw with earlier innovations. While challenges remain, we have better tools and knowledge to address them effectively. ■



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