



ELM Solutions

Driving strategic
legal operations for
success in times of
uncertainty



Introduction

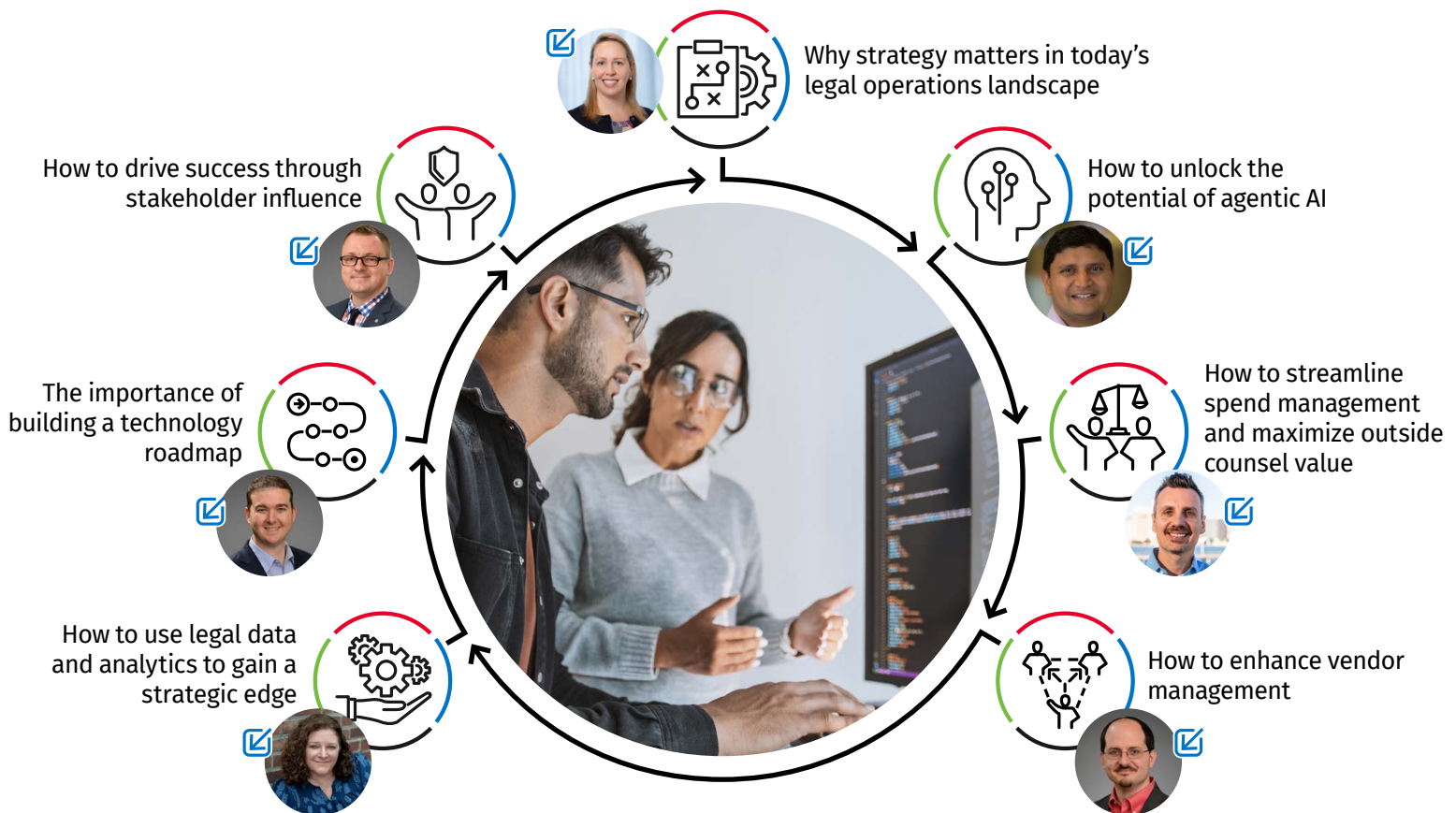
The days of legal operations being purely tactical are long gone. Like every corporate business unit, management expects legal operations to be a true business driver, not just a risk mitigator. Legal operations must become a force for organizational growth.

As legal operations teams assume this more prominent role within their companies, the market and economic landscapes continue to shift. Law firm rates are rising every year while businesses look to cut costs. Regulations are changing, even as organizations struggle to keep up with the previous wave of compliance requirements. Meanwhile, new AI

use cases are being introduced every day, before legal ops teams have even had a chance to consider how to implement yesterday's technology.

How can legal operations teams succeed during this exciting yet pivotal time? What can they do to evolve their departments from cost centers and administrative support functions to strategic partners and growth enablers?

Our panel of experts has the answers. In this whitepaper, you'll hear from Wolters Kluwer's subject matter experts on what it takes to turn legal operations into a strategic value center. You'll learn:



Read on to discover the answers you need to elevate your legal operations.

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Why strategy matters in today's legal operations landscape

Developing a strategic approach to legal operations has never been more critical. The pressure from the C-suite to grow revenue, optimize costs, reduce risk, and maximize value is felt acutely by corporate legal departments, especially during times of economic uncertainty and in the face of increasingly complex legal matters.

Today's legal operations experts aren't just responsible for enabling the efficient and effective delivery of legal services. Legal operations professionals are also expected to help create sustained value and provide their legal departments—and, by extension, their wider company—with a competitive advantage.

At Wolters Kluwer, over the past several years, we've seen a shift in legal operations from managing tactical responsibilities to more strategic transformation using technology and process changes. Anticipating challenges, aligning priorities and resources with business goals, and proactively addressing risks before they become issues are critical to moving our clients' legal operations from a cost to a value center.

The shift from tactical ops to strategic legal ops hasn't always been successful or as quick as many legal operations teams would like because of the time-consuming administrative tasks that are needed to achieve organizational goals. However, advanced legal technologies and fast-maturing AI have made the move possible. With increased process efficiencies and data, legal operations teams have everything they need to lay the groundwork to prove their sustained value.

The building blocks of strategically valuable legal operations

Strategic legal ops teams use maturity matrices and measure progress toward clear priorities using metrics and KPIs.

They are data-driven and use analytics to develop their strategies and make decisions on everything from vendor selection to resource allocation.

The most successful legal operations teams proactively and consistently communicate their plans, objectives, and achievements with stakeholders. They solicit feedback in return, allowing them to continually refine their approaches to be in line with broader organizational goals.



Diana Flanders
Vice President,
Strategic Planning and
Marketing

Today's legal ops professionals have the means to become more efficient, more forward-looking, and better able to map out strategies based on data-driven insights, not just instinct.

— Diana Flanders

Perhaps most importantly, they don't just embrace change; they welcome it. From technology additions to process redesign, strategic legal ops teams understand how to drive change and clearly articulate its benefits to key stakeholders. A sound approach to change enablement is essential to the success of transformational policies, tools, and practices that allow the legal department to enhance its strategic value.

And while legal ops professionals will likely always have some tactical and administrative responsibilities, the execution of many of those tasks can be significantly improved with the tools teams will have adopted as part of their strategic initiatives. Things like manual bill review, workflow and matter management, and other everyday activities are made more efficient with AI and automation, giving teams opportunities to enhance their organizations' bottom lines.

This is what today's legal operations look like

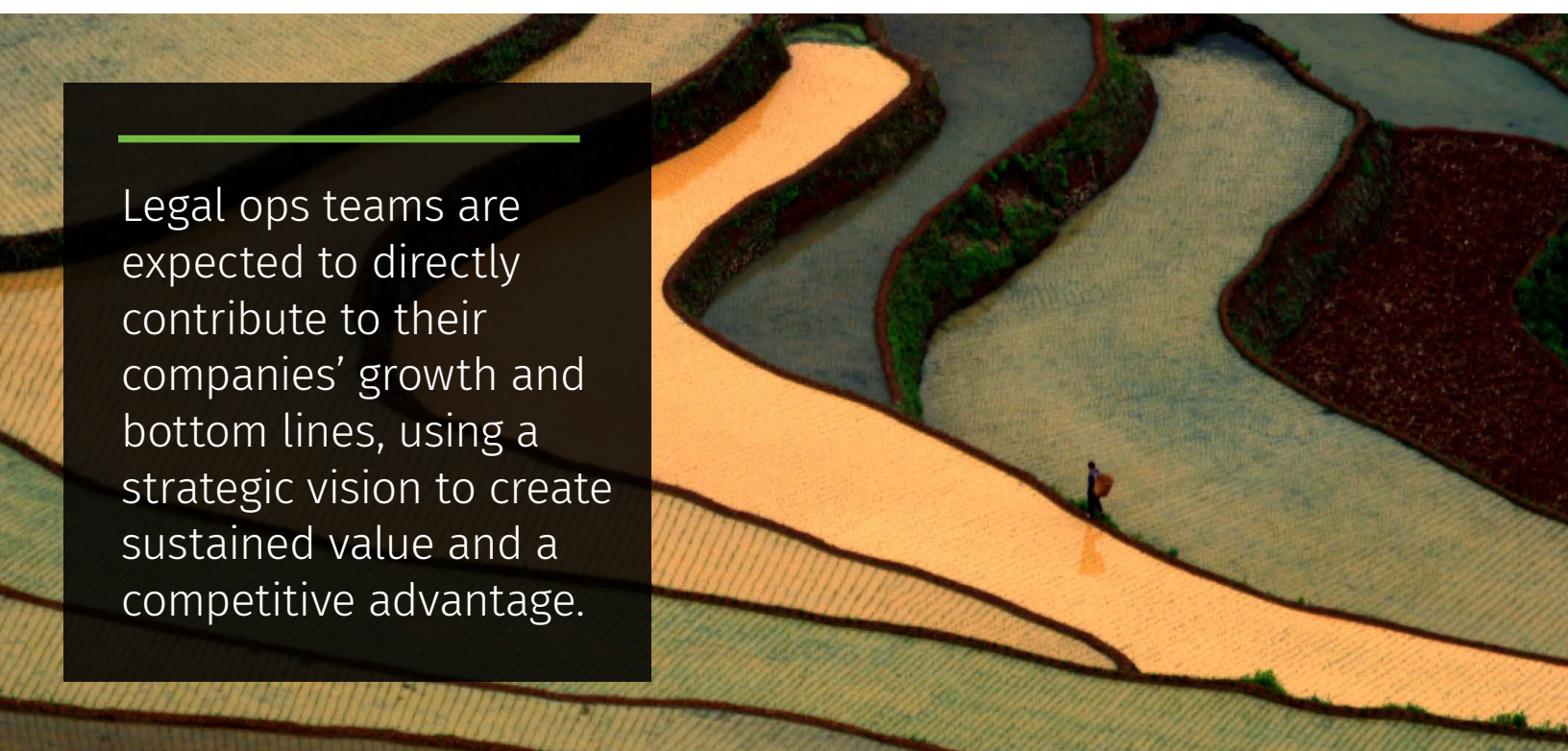
In the following chapters, you'll learn how modern strategic legal teams can adeptly handle unpredictable regulatory and economic environments while efficiently managing growing legal workloads.

Today's legal operations experts are in great positions to do just that. They have the technology, data, and support of their organizations. They also have the opportunity to embrace a strategic approach and elevate themselves and their businesses to new heights. 



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Legal ops teams are expected to directly contribute to their companies' growth and bottom lines, using a strategic vision to create sustained value and a competitive advantage.



Unlocking the potential of agentic AI in legal departments

Over the past few years, AI has evolved from a buzzword to a real driver of change. Legal ops teams initially adopted AI in areas such as large-scale eDiscovery and invoice compliance, often without realizing they were leveraging the technology. The release of ChatGPT and the broader excitement around generative AI brought AI into sharper focus, prompting legal teams to explore use cases, such as document drafting and summarization.

Now, the conversation is shifting again, this time toward agentic AI. Here's how legal operations teams can better understand and embrace this technology while becoming value-added strategic advisors for their organizations.

From tools to agents: A new era for legal ops

AI has already become a force multiplier for strategic-minded legal operations departments. AI enables smarter decisions about outside counsel, spend management, matter outcomes, and other factors that have a direct impact on companies' bottom lines. As a result, legal ops teams are doing more than ever, even with fewer resources.

Now, along comes agentic AI. Unlike traditional AI tools that require constant human input, agentic AI introduces autonomy. These systems can plan, reason, and execute actions across workflows, making them ideal for automating intricate legal processes, such as matter intake, invoice compliance, and law firm onboarding.

This shift from passive tools to proactive agents marks a significant leap forward in how legal departments can scale efficiency and deliver strategic value. However, it comes at a time when many teams are still struggling with ethical considerations and biases in legal AI applications, as well as identifying strategies for successful AI adoption.

Addressing those concerns must be the top priority if legal ops teams are to forge a path forward and benefit from agentic AI. Let's explore what that path might look like in a modern legal operations department.



Jitendra Gupta,
Head of AI & Data
Science

AI frees legal operations managers to become value-added strategic advisors.

— Jitendra Gupta

Identify the appropriate use cases

By grounding AI initiatives in real-world AI use cases that address immediate problems, rather than just hype, legal ops teams can make the business case for their technology investments. Matter intake and invoice compliance are two areas they should target.

Matter intake can be a time-consuming and complex process involving forms, emails, and intake portals. Agentic AI automates the process, using unstructured data from those sources to match matters with the most appropriate attorneys and firms.

It also automates invoice compliance, quickly flagging noncompliant charges and spend leakage—work that would take humans hours.

AI frees legal operations managers to become value-added strategic advisors. They can focus on performance benchmarking, strategic planning, budget forecasting, and managing law firm relationships. These are all especially vital during market and economic uncertainty when everyone in the corporation, including the legal department, is expected to increase the bottom line.

Build trust through responsible AI

Of course, successful AI deployments are built on trust, transparency, and accountability. Legal ops teams exploring AI solutions must choose carefully and should demand transparency and rigor from their vendors by asking:

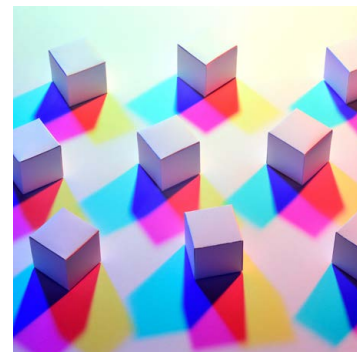
- What frameworks and safeguards guide your AI development?
- How do you mitigate bias?
- Are outputs explainable and auditable?
- Where is data stored, and is it reused for training?

At Wolters Kluwer, no vendor is onboarded without review from legal, AI, and InfoSec teams. We are also transparent about our approach and commitment to responsible AI, which guides the design, development, and deployment of advanced technologies that help our clients solve their most complex problems.

Scaling AI in legal ops with purpose

Legal operations departments should approach AI adoption the same way we do—in a considerate and purposeful way. For instance, agentic AI provides a clear path to meaningful automation and immediate value, with the ability to scale over time. But it's important not to “boil the ocean,” which can dilute focus and outcomes. Instead, legal ops leaders should:

- Prioritize investments based on business goals, technology and operational maturity, and use case complexity. Starting small, proving value, then scaling.



Other examples of agentic AI in action include:

- ✓ A legal ops manager deploys a contract review agent to flag risk clauses before external counsel sees them.
- ✓ A compliance officer uses a regulatory monitoring agent that continuously checks for changes in relevant laws.
- ✓ An agent handles vendor onboarding by automatically checking terms against preferred legal templates.

- Establish a strong data foundation. Many AI projects stall due to poor data quality. Now is the time to ensure data is centralized, accurate, and accessible.
- Understand vendor roadmaps. Many already offer AI capabilities that can improve efficiency without additional cost.

Finally, legal ops professionals shouldn't overlook the human element. The best AI outcomes occur with skilled human in the loop (HITL), so upskilling teams to effectively prompt and interpret AI outputs is critical.

The path forward

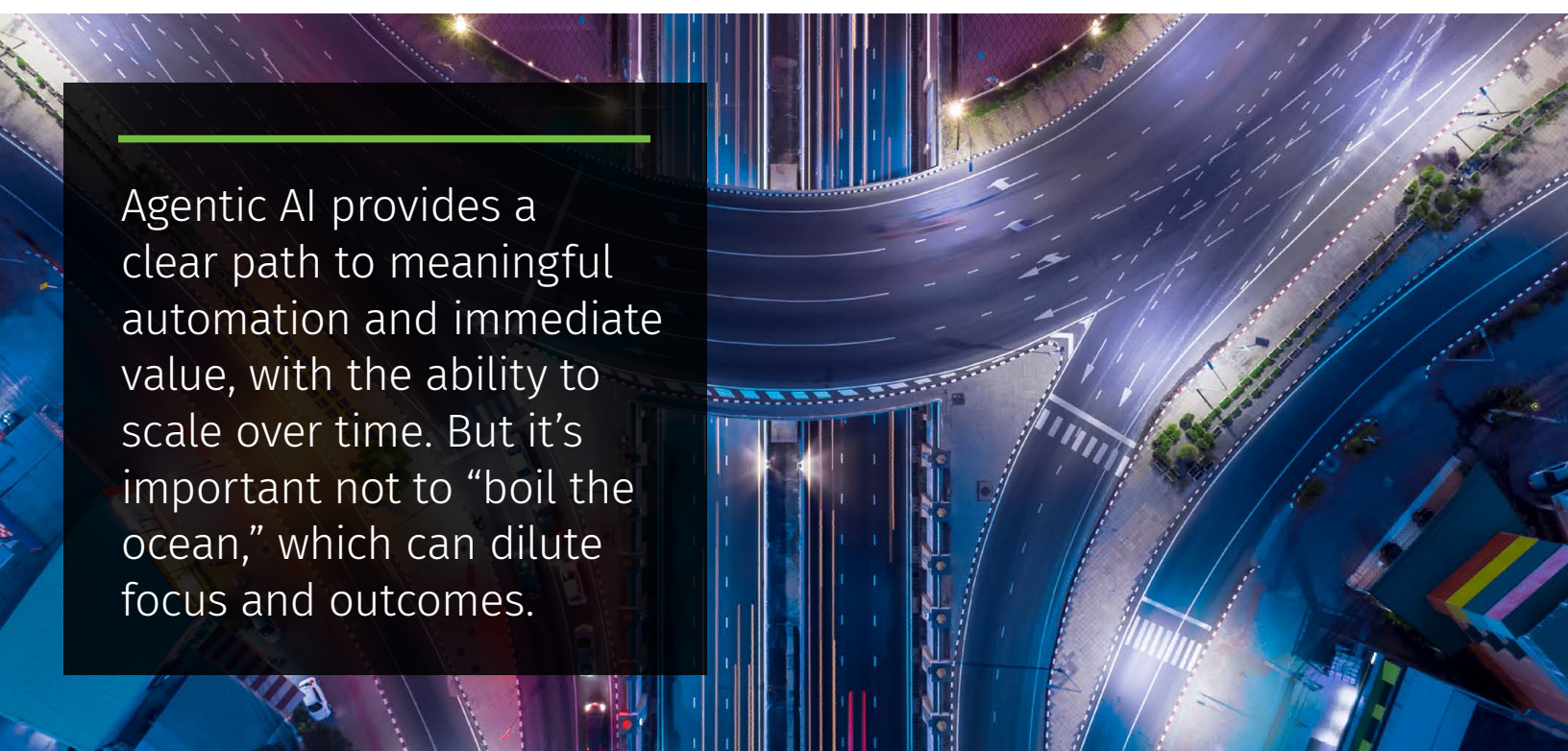
We are only beginning to scratch the surface of AI's potential in legal operations. Agentic AI promises to move the function beyond efficiency into orchestration, strategy, and influence at the enterprise level. This is an opportunity and responsibility that legal operations leaders must wholeheartedly embrace.



Three high-impact actions to effectively leverage AI:

- 1 **Target immediate value use cases.** Legal ops teams should focus on automating time-intensive tasks, like matter intake and invoice compliance, using agentic AI.
- 2 **Build trust through responsible AI practices.** Trust is foundational. Legal ops teams must vet AI vendors rigorously by asking the most fundamental questions.
- 3 **Scale purposefully with a strong data foundation.** Start small with clear business goals and scale based on proven value and focus on data quality and capabilities.

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Streamlining spend management and maximizing outside counsel value

Against a backdrop of economic uncertainty, rising inflation, increased law firm billing rates, and other factors, streamlining legal spend is no longer an option but a mandate that comes directly from the top levels of the enterprise.

In response, legal ops managers are looking to AI as a preferred tool to rein in costs and optimize spend management. It's a transformational technology that significantly improves and expedites bill review and budgeting, as well as matter management and law firm selection.

However, AI alone can't deliver effective and efficient spend management. It requires clean, structured data and human oversight to catch nuances AI may overlook. Structured data empowers legal operations teams to go far beyond identifying billing violations; it gives them a strategic way to manage spend by enabling predictive insights, performance benchmarking, and proactive cost control.

AI can rapidly surface patterns, anomalies, and opportunities for improvement while human oversight ensures those insights are interpreted with context and applied strategically. This partnership between technology and expertise allows legal ops to lead smarter conversations with outside counsel, optimize panel performance, and make data-driven decisions that deliver measurable business impact. The human-machine combination is essential for optimizing spend and serves as the foundation of a legal operations function that drives sustainable, long-term value for the business.

AI is only as good as the data it ingests

According to Wolters Kluwer's [2024 Future Ready Lawyer Survey](#), 73% of legal professionals expressed concerns about having to cope with the increased volume and complexity of information. But proper data management is essential for controlling costs and determining the value of the work performed by outside counsel.



Krys Chmielewski,
Associate Director,
Program Success

AI technology alone can't deliver effective and efficient spend management.

— Krys Chmielewski

Sloppy data leads to unreliable results. A legal operations team could have the world's best AI and automation tools at their disposal, but those technologies are only as good as the data they're ingesting. If the invoices the tools are analyzing contain vague and unstructured information, legal ops professionals will receive inaccurate outputs that could lead to missed spend leakage and even higher costs.

On the other hand, structured data gives legal operations teams enormous control over various aspects of legal spend. They can easily analyze what they've spent on similar matters in the past and use that insight to forecast accurate budgets moving forward. They can use spend analytics to assess law firm performance, including how much they are spending by firm and how close firms are adhering to billing guidelines.

With trusted spend and compliance metrics, legal ops professionals can make informed decisions about rate negotiations, panel composition, and overall efficiency improvements—all of which drive strategic value for their organizations.

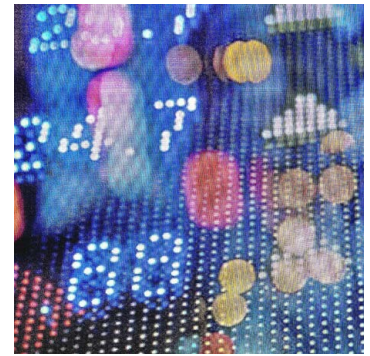
A fundamental shift toward structured billing data

To get there, corporate legal departments first need to establish a strong internal data foundation. That means moving beyond surface-level invoice details and focusing on metrics that drive strategic decision-making. Legal ops teams should ask:

- **What is the cost per resolved matter by type, jurisdiction, and complexity?** This enables historical benchmarks for budget forecasts based on real outcomes, not just estimates.
- **How do law firm performance metrics like budget adherence, cycle time, and outcome quality compare across similar matters?** This enables smarter panel management and more informed rate negotiations.
- **Where are we seeing spend leakage or inefficiencies across phases of the matter lifecycle?** This helps pinpoint opportunities for process improvement and better resource allocation.

Then, legal ops professionals can insist that law firms create well-crafted and specific invoices that are narrative-rich and align with defined expectations. This helps avoid the traps of opaque block billing and vague line items that limit visibility and make it hard for corporate legal to spot inefficiencies or billing errors.

Detailed and specific invoices also set AI up for success. Structured data allows AI to scan thousands of invoice line items in seconds, accurately identify billing guideline violations and surface anomalies or patterns that, when paired with human oversight, become a strategic asset for controlling costs, improving outcomes, and driving long-term value.



Achieving clarity and making every dollar count

At the end of the day, streamlining spend management is about achieving clarity: understanding how every legal dollar is spent, what value it delivers, and where efficiencies can be gained. This combination empowers legal ops to deliver measurable results—especially in an environment where every dollar counts. 

These are three actions legal ops teams can take to achieve strategic spend management:

- 1 **Establish structured billing expectations.** This will enable AI to surface actionable insights that can be used to optimize spend management.
- 2 **Use performance data.** Accurate data helps drive more informed and strategic conversations with outside counsel.
- 3 **Apply human oversight.** Human experts can validate and contextualize insights for smarter decision-making.

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Streamlining spend management is about achieving clarity: understanding how every legal dollar is spent, what value it delivers, and where efficiencies can be gained.

Enhancing vendor management with a data-driven approach

Modern legal operations are driven by data and relationships. A high-performing in-house legal team relies on granular data to align the right firm with the right matter, ensuring vendors meet established goals and expectations. This data helps build collaborative, results-driven partnerships.

Taking a data-centric approach to outside counsel vendor management is especially important during periods of economic uncertainty or law firm rate increases—like now. Wolters Kluwer's LegalVIEW® Insights reports that partners practicing at top 25 Am Law firms have hourly rates over 135% higher than partners practicing at the Am Law 151-200 tier firms, and out of the 37% of associates that raised rates over 10% in 2024, one third have already raised rates another 10% in 2025.

Here's how legal operations teams can use data to engage with and identify vendors, enforce adherence to billing guidelines and pricing agreements, and examine and optimize their relationships.

Establishing early benchmarks

Before embarking on the vendor selection process, corporate legal teams must understand key matter details, such as expected costs, timelines, jurisdiction, and other variables that influence firm selection.

However, estimating the scope of a matter can be challenging without access to hard data. Teams often rely on gut instinct or past experiences, assuming they know how long a matter will take or what it will cost. This kind of subjective approach, while common, can result in misaligned firm choices, unexpected budget and time overruns, and ultimately subpar outcomes—issues that can be difficult to justify to executive leadership.

This is where data-driven matter management becomes extremely important. By systematically capturing and analyzing historical matter data, legal teams can make far more accurate projections for future work. They can benchmark rates across firms and matter types, conduct competitive rate analyses, and use these insights to forecast budgets, estimate timelines, and set realistic expectations with internal stakeholders.



Vince Venturella,
Associate Director of
Product Management

Taking a data-centric approach to outside counsel vendor management is especially important during periods of economic uncertainty or law firm rate increases—like now.

— Vince Venturella

Rate benchmarking is particularly critical because it gives legal teams the context they need to determine whether a proposed rate is fair and market aligned. Without it, teams risk overpaying for legal services or underestimating the cost of similar future matters.

Identifying the correct vendors

Once that information is in place, legal teams can begin issuing RFPs to prospective firms. RFPs allow teams to gather detailed vendor insights, such as proposed scope, staffing plans, and strategic approaches, and store them in a centralized repository for future reference and cross-team knowledge sharing. In essence, RFPs serve as a structured, efficient way to capture firm-specific data that legal teams might not otherwise have access to.

RFPs also let legal ops managers set up compliance baselines—such as budgets, fee arrangements, rates, and more—that can be fed back into and tracked through their matter management systems. This ensures alignment between vendor commitments and actual performance, making it easier to monitor adherence, flag deviations early, and maintain accountability throughout the lifecycle of a matter.

Evaluating performance and improving collaboration

Teams can leverage the data memorialized in the RFP process during periodic check-ins to ensure their vendors are hitting their KPIs throughout the course of the engagement. Typical KPIs include:

- **Communication effectiveness:** Are firms responsive? Do they communicate proactively?
- **Financial discipline:** Are budgets and invoices timely, accurate, and compliant? Are firms adhering to billing guidelines and agreed-upon pricing arrangements?
- **Outcomes:** Did the matter result in a positive or negative result, considering scope and complexity?

Data opens the door to transparent, constructive conversations with vendors, enabling legal teams to identify opportunities for improvement, negotiate more effectively, and build trust-based relationships. For example, metrics related to compliance and responsiveness can guide rate discussions while insights into outcomes and predictability are especially valuable when structuring alternative fee arrangements (AFAs).

To be effective, these metrics should be both objective, such as invoice compliance, budget accuracy, and matter outcomes, and subjective, like responsiveness and communication style. While analytics provide valuable benchmarks, the attorney's own perception also matters: Did the billing feel fair, accurate, and free of inefficiencies?



All this information should be shared between corporate legal teams and outside counsel, creating a common ground for collaboration. When both parties are aligned on expectations and armed with performance data, they can work more effectively toward mutually beneficial outcomes.

The future of vendor management in legal ops

Legal ops will continue to play a more strategic role in vendor management, driving cost savings, improving spend control, and maximizing the value of partnerships.

Those who embrace structured data, transparent communication, and a continuous improvement mindset will be best positioned to thrive, no matter the market conditions. 

Data will play a key part in this evolution. To make an immediate impact, legal ops leaders can take the following steps:

- 1 **Establish data-driven benchmarks early.** Before selecting vendors, legal teams should analyze historical matter data to accurately forecast costs, timelines, and scope.
- 2 **Use RFPs to centralize vendor insights and set compliance baselines.** RFPs are powerful tools for gathering vendor proposals and storing them for future reference. They also help set clear expectations around budgets, staffing, and fee arrangements.
- 3 **Monitor performance and foster relationships.** Combining objective metrics with attorney feedback enables transparent conversations, better rate negotiations, and stronger partnerships.

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Data opens the door to transparent conversations about opportunities for improvement and negotiation.

Gaining an edge with legal rate analytics

Rate analytics are no longer just a tool for cost control. Today, they are a foundation for strategic leadership in legal operations.

Understanding how much is being paid, to whom, and for what kind of work is just the starting point. Rate analytics serve as a lens through which legal departments can evaluate firm performance, optimize resource allocation, and plan more effectively for the future.

However, organizations realize the full value of rate analytics when they combine internal data with the broader context of external benchmarks. Internal insights, such as historical matter spend, average hourly rates, and billing compliance, offer valuable insights into past performance. But when paired with external reference points, such as industry-standard rates, specific matter-type pricing demands, or regional trends, they provide a more expansive perspective of the market, enabling legal teams to negotiate with outside counsel from a position of knowledge and strength.

Let's explore how legal rate analytics and data assets can help legal ops teams gain a strategic edge.

Understanding internal data is the foundation of strategic enablement

Internal analytics can hold the key to effective strategy. They give legal operations teams the insight needed to allocate resources wisely, align with enterprise priorities, and position them as true organizational value-drivers.

To serve as effective strategic partners, legal operations teams must first identify the data available and clarify the outcomes they aim to achieve. For instance, legal ops can break rate data down by firm, region, or matter type to match specific priorities. Analyzing historical spend patterns, billing compliance, and concentrated areas of spend provides the foundation for smarter decisions around firm selection, budgeting, and overall legal spend management.



Jennifer McIver,
Associate Director of
Legal Operations and
Industry Insights

Organizations realize the full value of rate analytics when they combine internal data with the broader context of external benchmarks.

— Jennifer McIver

The importance of external benchmarking for a complete perspective

Internal insight alone isn't enough, though. To make truly strategic decisions, legal teams also need external benchmarking data that shows standard market billing rates, where costs deviate, and how performance stacks up against peers.

External benchmarking should be multidimensional and feature a mix of analysis, including actual approved rates, year-over-year trends, and the right granularity of details to assess pricing competitiveness. Each of these data points serves a different purpose depending on the audience, whether it's internal stakeholders, finance teams, or law firm partners.

Benchmarking also plays a critical role in operational efficiency and financial discipline. Forward-thinking legal ops teams use rate data to spot revenue leakage, justify rate adjustment requests, and ensure consistency in pricing conversations with outside counsel. By applying benchmarks in these ways, legal departments strengthen their negotiating position and their internal decision-making.

Dynamic data is essential to effective benchmarking

Access to dynamic, up-to-date data that reflects current market conditions is key to effective benchmarking, especially in today's market, where law firm rates are continually increasing. Legal ops teams need to make informed decisions based on current figures, not information from a previous year's annual report. Fresh, granular information showing what companies are paying versus what firms are quoting helps legal teams make grounded and timely decisions in volatile market environments.

That level of dynamic, market-relevant benchmarking serves multiple purposes. It allows legal operations teams to engage with finance on budget planning and forecasting, collaborate with procurement on firm selection and vendor management, and provide the C-suite with meaningful insights into risk, value, and efficiency. It also equips legal teams to enter law firm negotiations with confidence by helping them negotiate fairly and reinforce expectations around performance and value.



Three actions for strategic rate analysis:

- 1 Audit your data.** Start by identifying and organizing your internal rate data. Break it down by firm, region, and matter type to uncover patterns in historical spend, billing compliance, and concentrated areas of spend. Use these insights to align your legal operations strategy with business goals.
- 2 Incorporate external benchmarks.** Pair your internal data with external benchmarking metrics, such as industry-standard rates, matter-type pricing, and regional trends. Use this data to evaluate pricing competitiveness, negotiate with outside counsel, and ensure your decisions are informed by a complete market perspective.
- 3 Commit to continuous analysis.** Make rate analytics an ongoing process. Leverage dynamic, up-to-date data to adapt to market fluctuations, refine your strategies, and maintain alignment with organizational goals. Regularly revisit your benchmarks to stay ahead in a rapidly changing legal landscape.

From cost control to value creation

By using both internal data and external benchmarks to inform decisions, legal operations moves beyond a support role to become a true business partner—contributing meaningfully to enterprise goals and long-term value creation.

Importantly, analyzing both internal and external data needs to be a continuous and evolving process. Only through ongoing analysis can legal operations teams ensure their decisions stay aligned with current realities and future goals, allowing them to lead with clarity and adapt with agility.

By committing to continuous analysis and embracing data as a strategic asset, legal ops teams position themselves as drivers of value, insight, and innovation.



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Access to dynamic, up-to-date data that reflects current market conditions is the key to effective benchmarking.

Using a technology roadmap to build a case for legal innovation in uncertain times

In times of market uncertainty and shifting priorities, legal operations often faces tough choices about where to focus limited resources. And while the natural corporate instinct may be to slow down—postponing change, delaying new initiatives, and reducing investments—a short-term freeze in technology spending can quickly erode efficiency, limit agility, and weaken competitive standing.

Yet, it is precisely during uncertain times that investing in technology becomes crucial for building long-term resilience. Automation and AI can reduce costs, improve scalability, and enable legal teams to support business growth without proportionally increasing headcount. With market volatility likely to become the new normal, adaptability and proactive technology adoption are essential for maintaining a strategic and competitive edge.

To secure meaningful investment, legal ops must use the technology roadmap as a foundation for the business case to demonstrate how planned technology initiatives directly support enterprise goals and address operational pain points. A well-defined roadmap enables legal operations teams to navigate market fluctuations proactively rather than reactively, adapt to regulatory shifts, align investments with business priorities, prepare teams for change, and map a path forward while maintaining agility.

Here are four ways legal operations can build a strong business case for technology investments that support both legal and organizational priorities.

1 Evaluate the current state of technology within legal departments

To build an effective technology roadmap, legal ops teams must begin with a clear, detailed assessment of their current technology landscape and maturity, ensuring it not only meets today's needs but also adapts and scales for what's next. The first step in this assessment is to identify all solutions in use—not just platforms but underlying processes, data flows, and user interactions across systems. Mapping how data moves across systems and how users engage with technology reveals inefficiencies, outdated workflows, and unnecessary workarounds.

With this comprehensive baseline, legal ops teams can uncover gaps and opportunities and make a strategic case for prioritizing investments that will deliver the greatest impact and advance the organization's technology maturity.



Jared Hostmeyer,
Senior Director,
Product Management

To build an effective technology roadmap, legal ops teams must begin with a clear, detailed assessment of their current technology landscape and maturity, ensuring it not only meets today's needs but also adapts and scales for what's next.

— Jared Hostmeyer

2 Demonstrate ROI and long-term benefits of technology investments

Legal teams need clear, credible metrics to justify technology expenditures. Since today's technology and business environments are changing so rapidly, the best business cases balance short- and medium-term ROI, typically looking at a three-year horizon. This timeframe aligns well with business leaders' expectations while accommodating the realities of upfront investment and implementation timelines.

ROI isn't solely about direct cost savings, such as reduced spend on outside counsel or administrative overhead. It's also about legal operations proving how they fuel growth, streamline workflows, strengthen compliance, and empower the business to move forward. For example, AI and other technologies can enable faster deal cycles, scaling efficiently without additional headcount, improved compliance, and better risk mitigation. These can be powerful metrics, even if they don't directly result in cost savings.

Choosing the right tools is also key to maximizing ROI. Legal ops should prioritize technology that can scale with the organization's growth. It's important to partner with a vendor that is adaptable and innovative, collaborates closely with its customers, and is dedicated to delivering meaningful outcomes.

3 Align technology goals with corporate strategy

Perhaps the most critical aspect of a technology roadmap business case is ensuring alignment with the broader corporate strategy. Legal operations can't function in isolation; their goals must reflect and support the enterprise's growth plans, cost management priorities, and risk appetite. Without a clear roadmap, legal departments could slow progress and struggle to scale, adapt, or add real value in a changing business environment.

Close collaboration with IT, finance, risk, and other business units is key. Legal teams should "speak the language" of these stakeholders, demonstrating an understanding of their objectives and challenges.

Just as importantly, legal operations must be able to clearly articulate what's at risk without investing in new technology, whether it's slower response times, limited visibility into legal spend, or inability to scale support for evolving business needs. Without a roadmap, legal risks being perceived as a cost center rather than a strategic enabler, making it harder to secure budget, influence decisions, or contribute meaningfully to enterprise goals. Partnering with other business units fosters trust, smooths budget approvals, and facilitates cross-functional change management.

4 Manage change

No matter how fast things are moving in the market, introducing new solutions requires time for change management and readiness. Legal operations teams need to proactively tackle user adoption challenges and resistance to new tools or processes. Consider the following:

- Understand the needs and pain points of end users and leadership
- Engage users early through pilots to foster buy-in and uncover potential issues



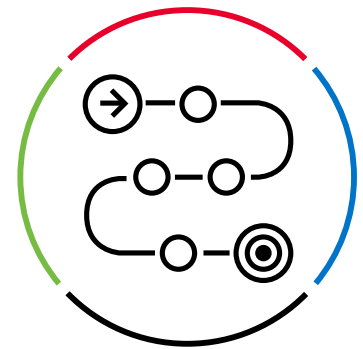
- Empower enthusiastic users to help drive adoption and assist their peers
- Clear communication about the benefits of new technology, tailored training programs, and ongoing support also help ease the transition

Supporting technology implementations with change management helps ensure that investments translate into real, sustainable improvements.

Seizing the opportunity to drive the business forward

Legal operations teams have been granted an unprecedented opportunity to step up as technology leaders within their organizations. No longer just behind-the-scenes problem solvers, they're now trusted partners with the power to use technology to advance their legal department, and, by extension, help move the whole company forward.

A well-thought-out, strategic technology roadmap that reflects these priorities will not only help legal ops secure investment. It will also position them to lead transformation, deliver measurable value, and help the business thrive in an increasingly complex and competitive environment.



To seize this opportunity, legal ops must take deliberate steps:

- 1 Assess their current technology landscape** to uncover inefficiencies and identify high-impact investment opportunities.
- 2 Build a compelling ROI case** that connects technology to business outcomes and aligns with a three-year strategic horizon.
- 3 Align technology goals with corporate strategy** while managing change to ensure adoption and long-term success.

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Without a clear roadmap, legal departments could slow progress and struggle to scale, adapt, or add real value in a changing business environment.

Driving success through stakeholder influence

In a volatile economic and market landscape, legal operations professionals are being called to do more with less but not alone. Internal stakeholders play a key role in helping legal ops managers succeed. Indeed, this moment presents a unique opportunity for legal ops to do what it does best: align stakeholders, processes, and technology to help the business achieve its goals efficiently and strategically.

Here's how legal operations teams can identify appropriate stakeholders, foster cross-functional collaboration, and effectively communicate their strategic value across the organization. By doing so, they can become an essential part of the company's success story.

Identify and engage key stakeholders early

In today's matrixed organizations, the list of stakeholders is longer and more diverse than ever. To drive the business forward, legal ops teams must engage a range of partners, including:

- **Legal leadership:** General counsel and legal ops directors who drive strategy
- **End users:** Attorneys, paralegals, and legal staff who feel the pain of inefficient processes and want tools that make their jobs easier
- **Enterprise leaders:** CFOs, COOs, and, in smaller companies, CEOs, who care deeply about cost containment, risk mitigation, and strategic alignment
- **Support functions:** IT, procurement, compliance, and risk, who often control or influence technology decisions

Involving these groups early, before a project kicks off or a tool is selected, prevents costly surprises down the road and can make stakeholders more likely to support legal ops' initiatives later. Early involvement also builds trust and transparency, which are essential for navigating uncertainty.



Jay Kiros,
Global Director, Sales
Solution Engineering
and RFP Management

This moment presents a unique opportunity for legal ops to do what it does best: align stakeholders, processes, and technology to help the business achieve its goals efficiently and strategically.

— Jay Kiros

Build consensus and foster cross-departmental cooperation

One of the biggest barriers to progress in legal ops isn't lack of budget; it's misalignment. When legal, finance, IT, and compliance operate with competing priorities or incomplete information, decisions stall, projects fail, and frustration builds.

Legal operations must step into the role of a change agent, proactively aligning stakeholders around shared business goals. By leveraging data, process expertise, and a deep understanding of legal and operational needs, legal ops can enable strategic collaboration—ensuring that every department is working from the same playbook to save time, reduce costs, and manage risk more effectively.

Listening sessions and stakeholder alignment workshops, for example, provide legal operations teams with the space to uncover stakeholder motivations, surface friction points, identify areas of alignment, and acknowledge both emotions and behaviors. These forums help reframe conversations around shared priorities and organizational goals, rather than just focusing on legal requirements.

That's the power of strategic enablement—legal operations acts as a force multiplier by driving clarity, surfacing shared priorities, and accelerating decision-making across the organization. While legal ops may not have all the answers internally, tapping into vendor expertise and industry best practices can be a powerful way to inform change, especially when navigating complex transformations like technology adoption. Legal ops leads the charge, bringing the right voices to the table and translating insights into action.

Use data-driven insights to communicate the strategic impact of legal ops

In times of economic uncertainty, every team must justify its value. For legal ops, that means moving beyond efficiency metrics to telling a bigger story, one that directly connects their work to business outcomes and strategic goals.

To do this, legal ops must become brokers of insight, turning raw data into meaningful narratives that reveal what leadership didn't see and how legal ops teams made it possible.

This means shifting the narrative from:

“We consolidated our legal vendors to reduce spend by 15%.”

To that of a strategic partner:

“We optimized our legal vendor portfolio, reducing spend by 15%, improving service quality, and enabling reinvestment in high-priority risk mitigation and compliance initiatives.”



Three high-impact actions for effective communication and collaboration:

- 1 Host stakeholder alignment workshops.** These can help uncover motivations, friction points, and areas of convergence across departments.
- 2 Reframe conversations around shared business goals.** Talk about efficiency, risk management, and cost control, rather than just legal requirements.
- 3 Leverage vendor and industry expertise.** Their knowledge will help inform decisions, especially when navigating complex changes like technology adoption.

The role of legal operations isn't just about managing spend—it's about communicating the story behind the numbers. When CFOs see rising legal costs, they need more than a budget line item; they need context.

For example, LegalVIEW Insights shows that while matter volume and staffing remained flat between 2023 and 2024, total spend in high-impact practice areas like intellectual property, finance and securities, and corporate law rose by over 31%, driven largely by rate increases at top-tier firms. Legal ops teams can use this kind of data to reframe conversations with finance: not as a request for more budget but as a strategic explanation of market dynamics, risk exposure, and the value of targeted investment.

Legal ops as a strategic enabler

At its core, legal operations is about orchestration—aligning people, processes, and technology to solve complex problems. That makes legal ops uniquely equipped to lead in times of uncertainty.



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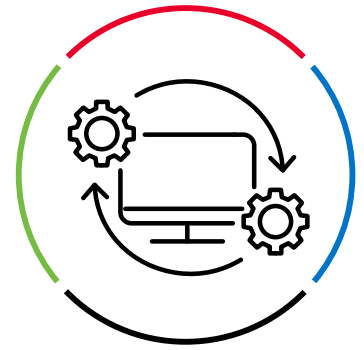
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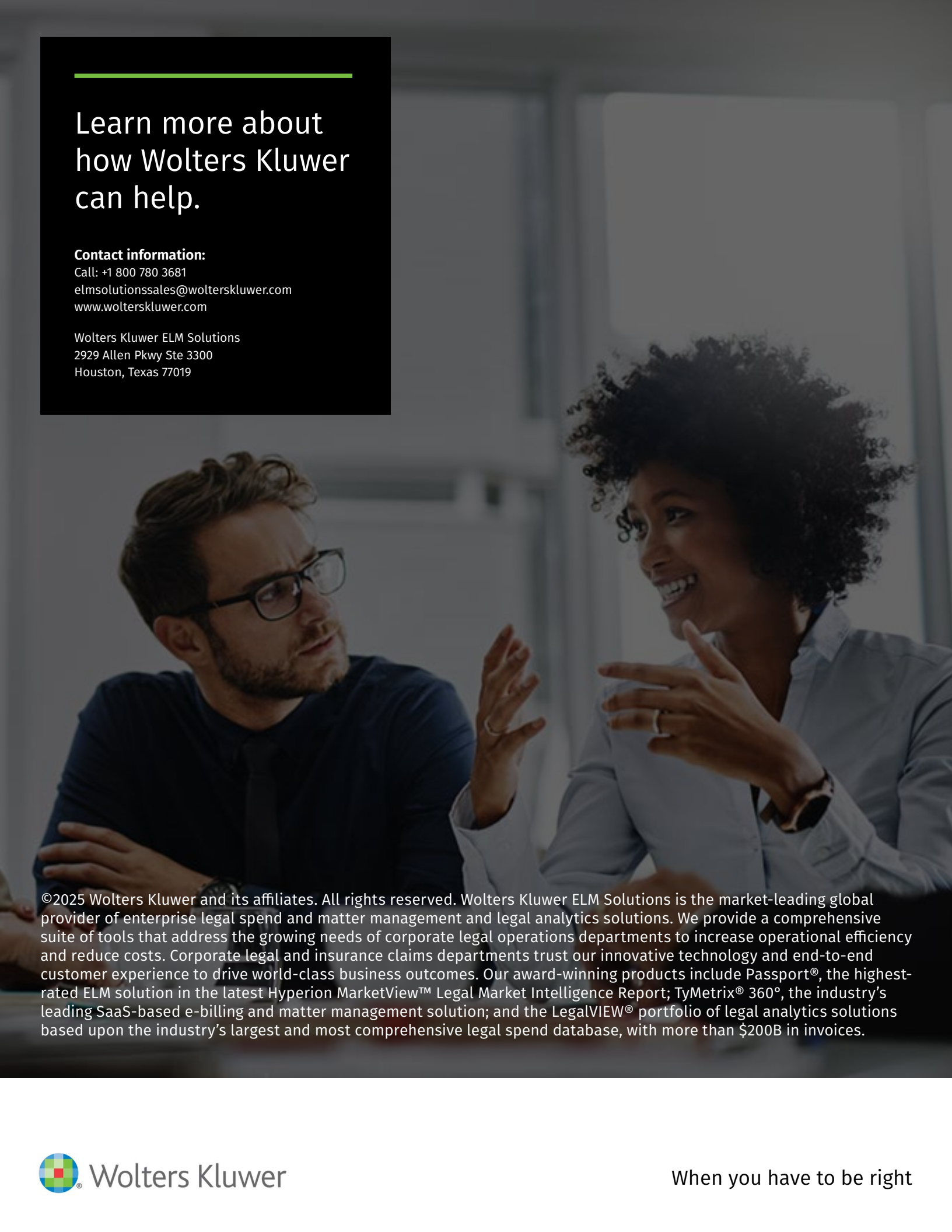
A final thought...

Embedding strategic thinking into legal operations is essential for driving impact across the business. Combining this mindset with the right tools and processes—including data, AI, communications, and collaboration—empowers legal teams to enhance spend management, predict and shape outcomes, improve partner relations, and deliver measurable value to the enterprise.

It's the difference between reacting to change and leading through it.

Don't wait, start now.





Learn more about how Wolters Kluwer can help.

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