

# Balancing Tensions While Driving Towards Strategic Modernization

**FULL RESULTS PACKAGE**  
**18TH ANNUAL LAW DEPARTMENT OPERATIONS SURVEY**



## DEAR STAKEHOLDER,

Thank you for participating in Blickstein Group's 18th Annual Law Department Operations Survey. We're pleased to share this year's report and full results package. This package is exclusively for survey respondents, so please do not share it outside your organization.

The 2025 findings point to a function that is stabilizing but under real pressure. The "build-out" era is slowing, with only 4.8% launching a legal ops function this year and the share expecting their team to shrink more than doubling to 10.8%. Legal ops is increasingly embedded across the enterprise, though 52.4% still never collaborate with procurement, and timeliness jumped from 4.9% to 40.4% as a top KPI.

Technology sentiment beats the usual narrative, with 76.5% saying they have the right technology to do their jobs and 72.6% saying the same for their lawyers. AI adoption is now real-world, with 75% piloting or fully operating GenAI tools and usability now leading priorities over security. Law firm rate increases remain widespread, and sentiment toward ALSPs stays strong, with 43.5% expecting ALSP spend to increase next year.

Legal departments remain committed to driving innovation, though attitudes are shifting toward greater openness to innovation from other quarters. Expectations for law firms remain high, with an ongoing call for firms to lead with new service delivery models, technology-enabled efficiencies, and alternative staffing. The year ahead points to continued modernization, greater structural flexibility, and deeper collaboration across law firms, ALSPs, and corporate legal teams.

Special thanks go to our collaborator, FTI Consulting, for their invaluable support. We're also grateful to our sponsors: Icertis, NetDocuments, Integreon, Wolters Kluwer, UnitedLex, LegalOps.com, and Leopard Solutions.

We also want to sincerely thank our advisory board members for their invaluable contributions to this survey and report. Their expertise helped shape the questionnaire, ensured intellectual rigor, offered key insight into the results, and played a critical role in driving responses. We appreciate their dedication and support.

All the best,

Samuel S. Moon  
Publisher, Law Department Operations Survey Report  
COO & Head of Research, Blickstein Group, Inc.

# 18TH ANNUAL LAW DEPARTMENT OPERATIONS SURVEY

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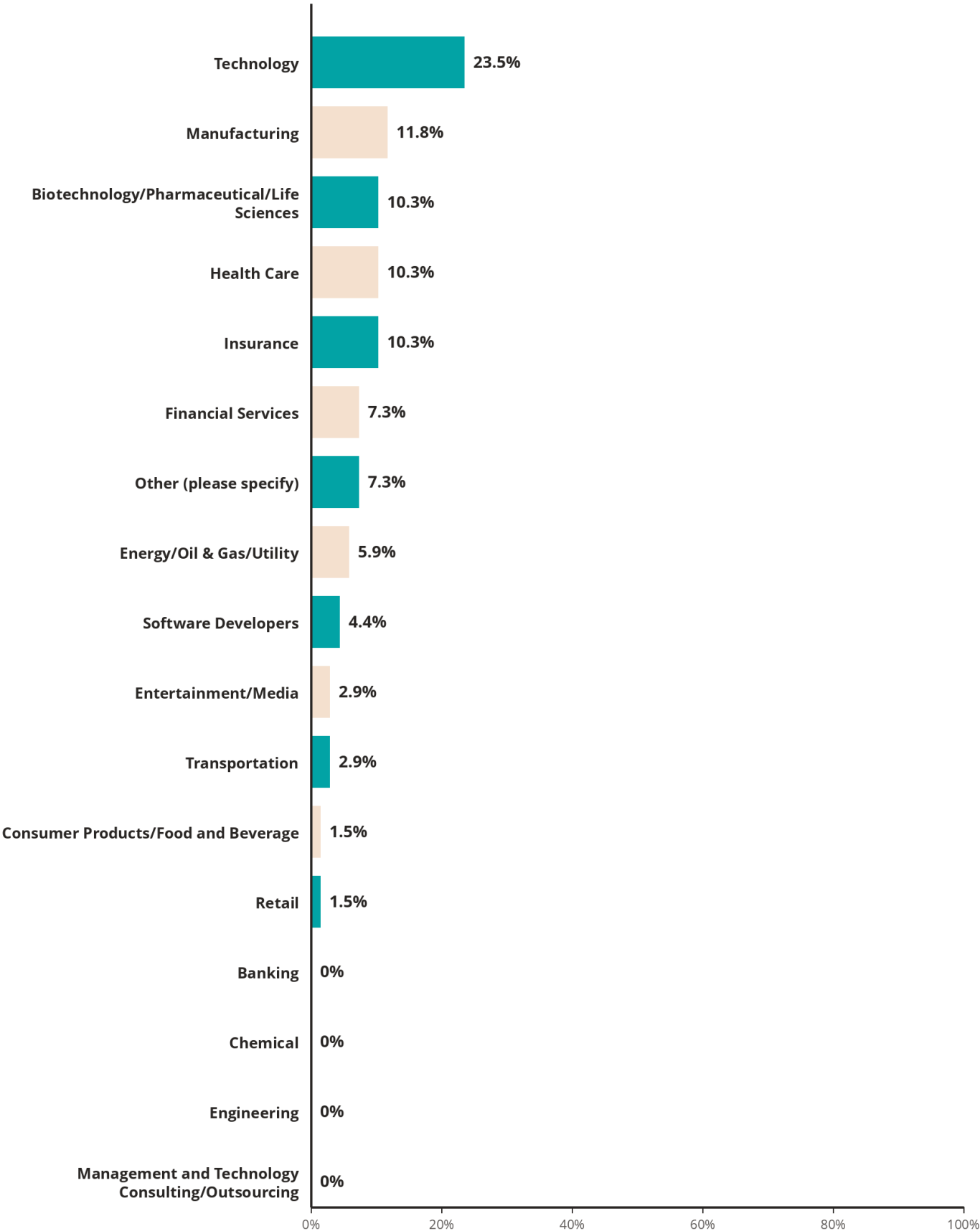
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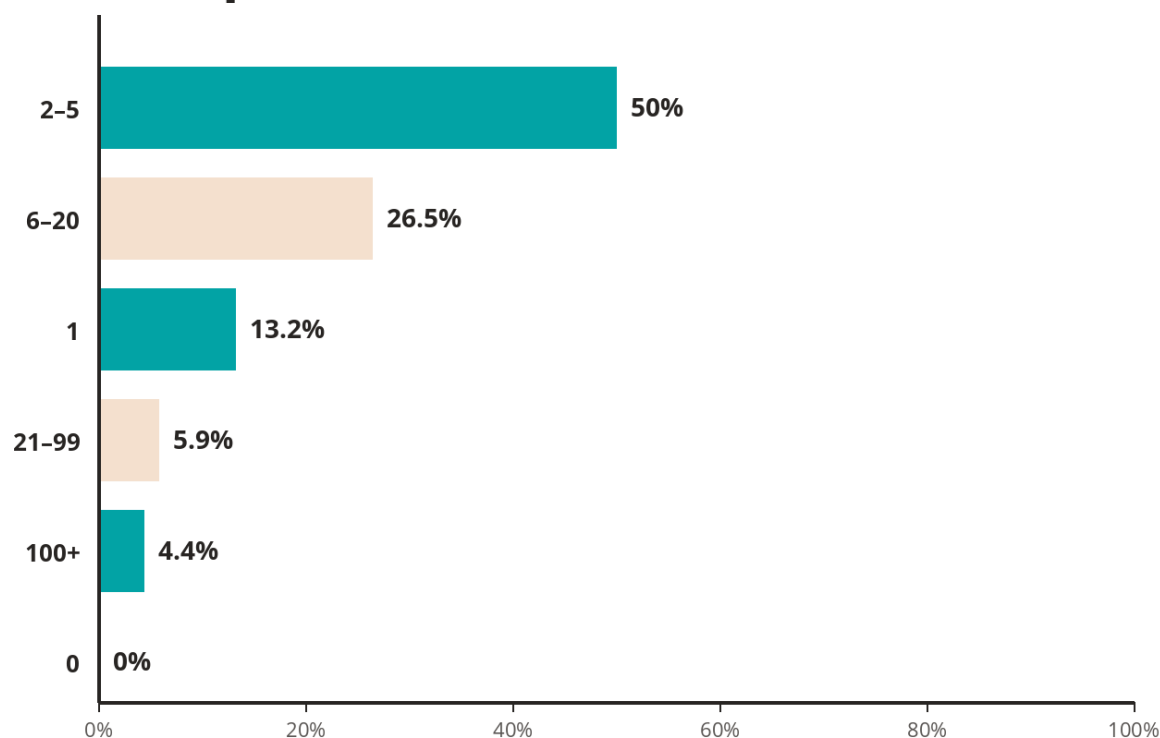
For more information about the survey or to purchase the full LDO survey results package for 2025, please contact Sam Moon at [sam@blicksteingroup.com](mailto:sam@blicksteingroup.com).



# What industry is your company in?

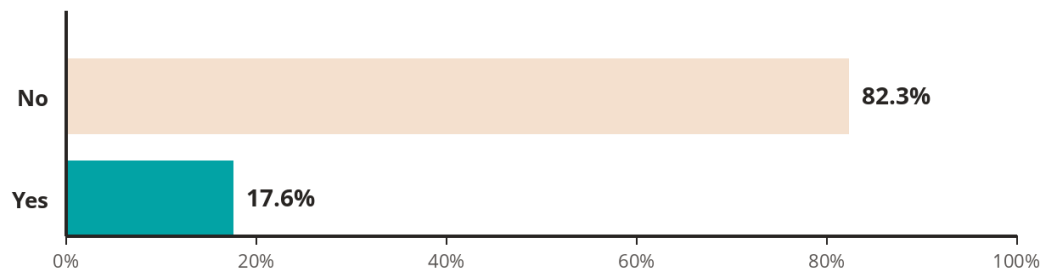


**How many total full-time employees are on the legal operations team?**



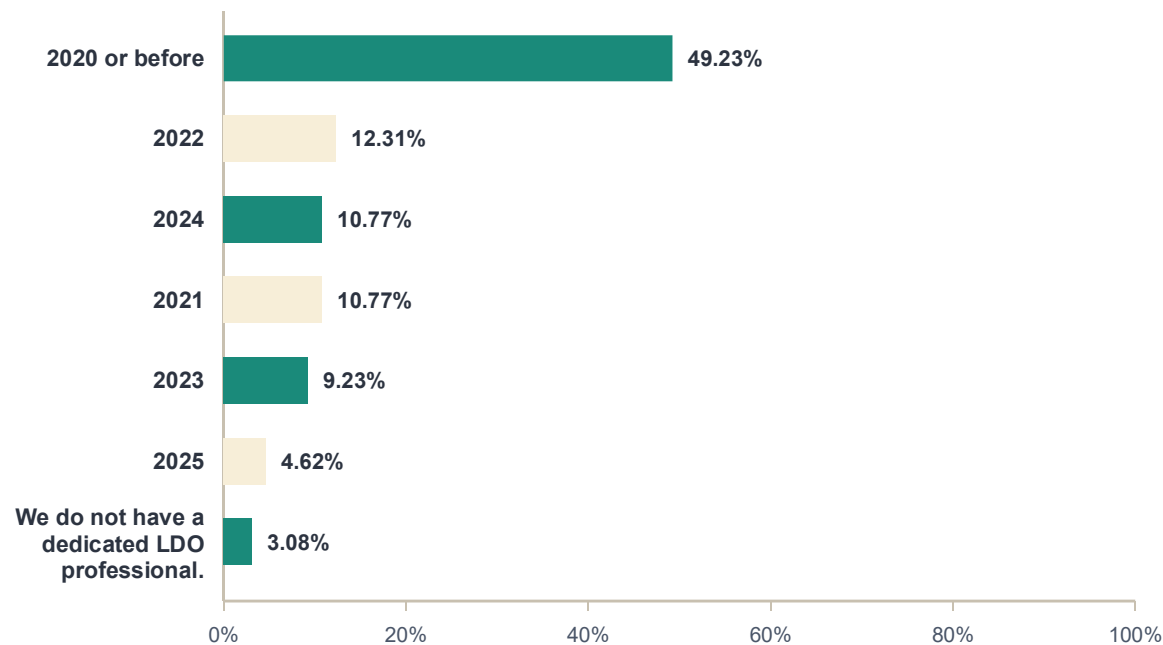
Q6:

**Are you a practicing in-house lawyer also supporting ops?**

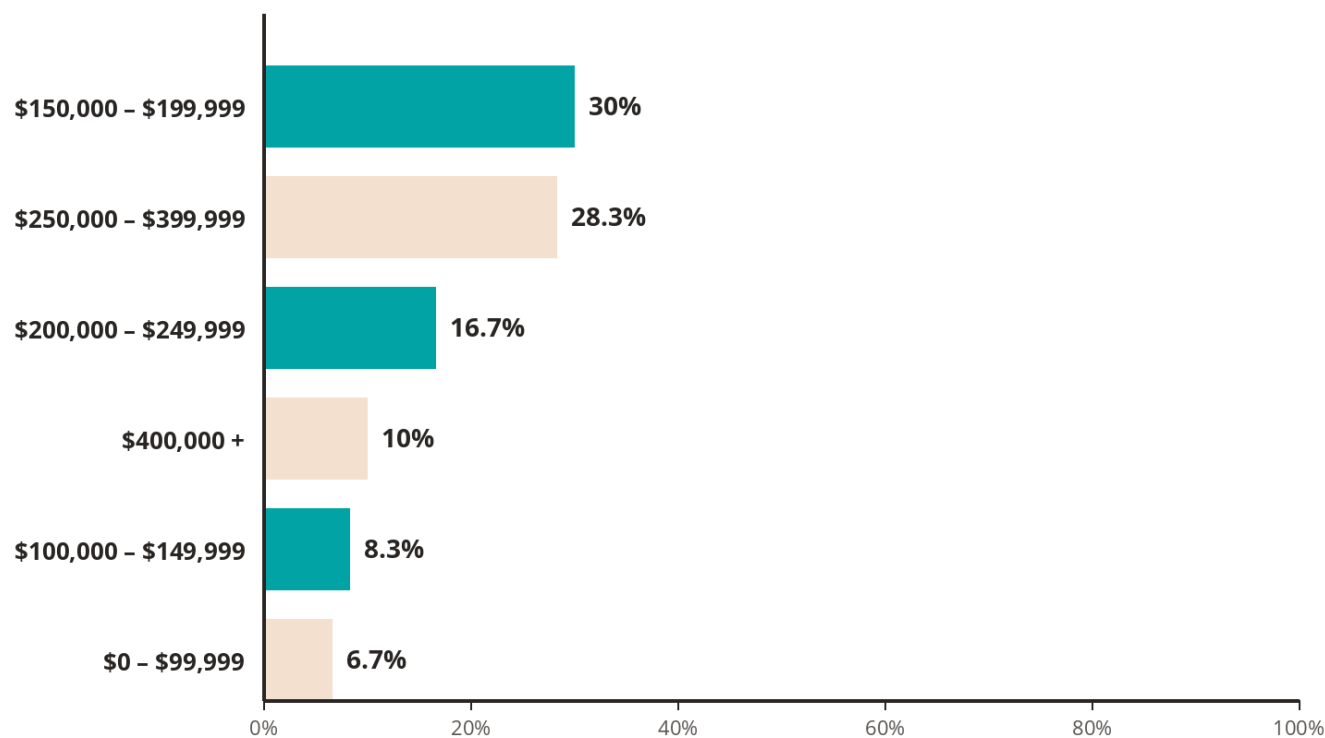




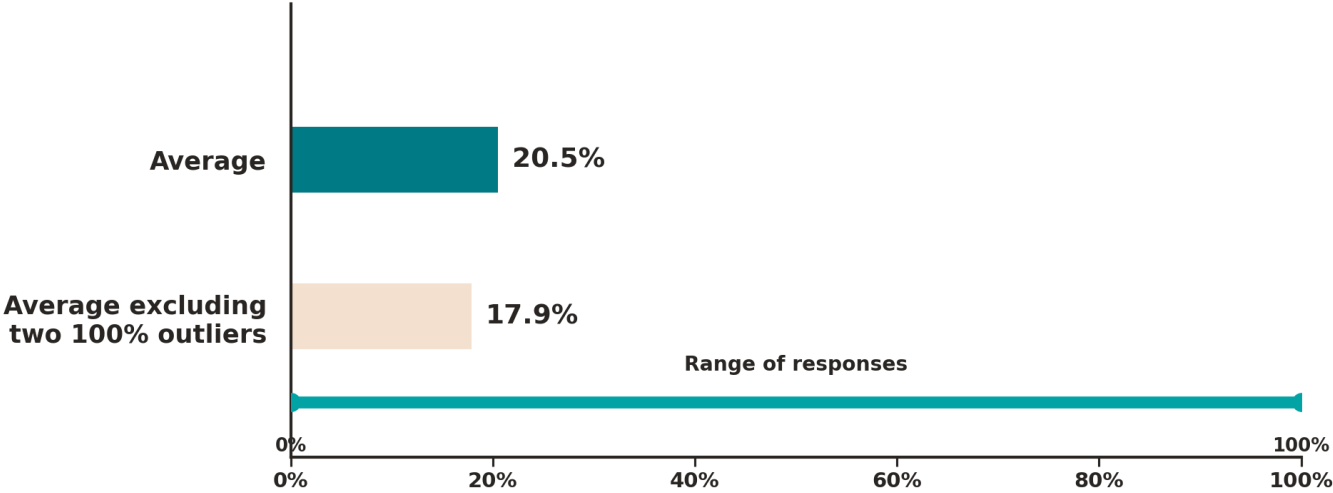
In what year did your company add its first dedicated law department operations professional of any kind?



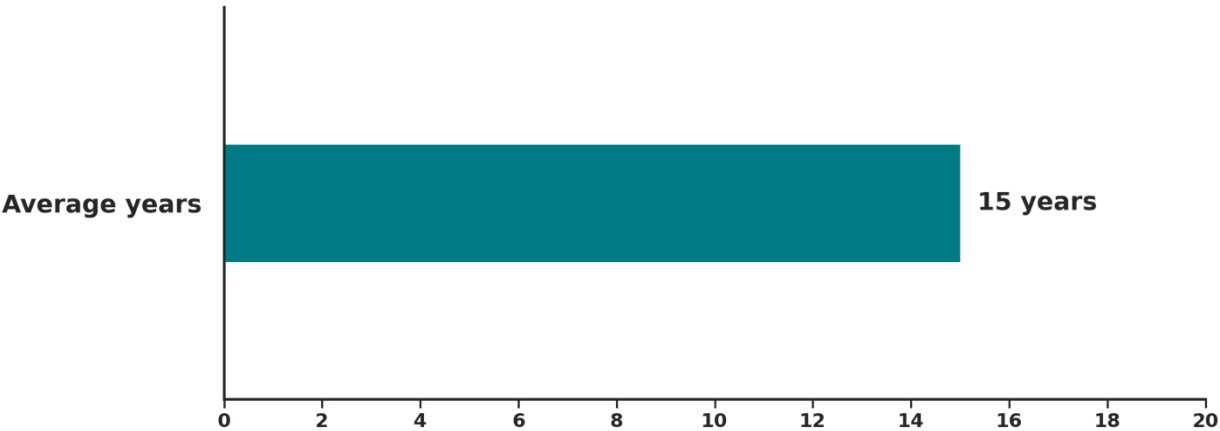
What is your annual salary?



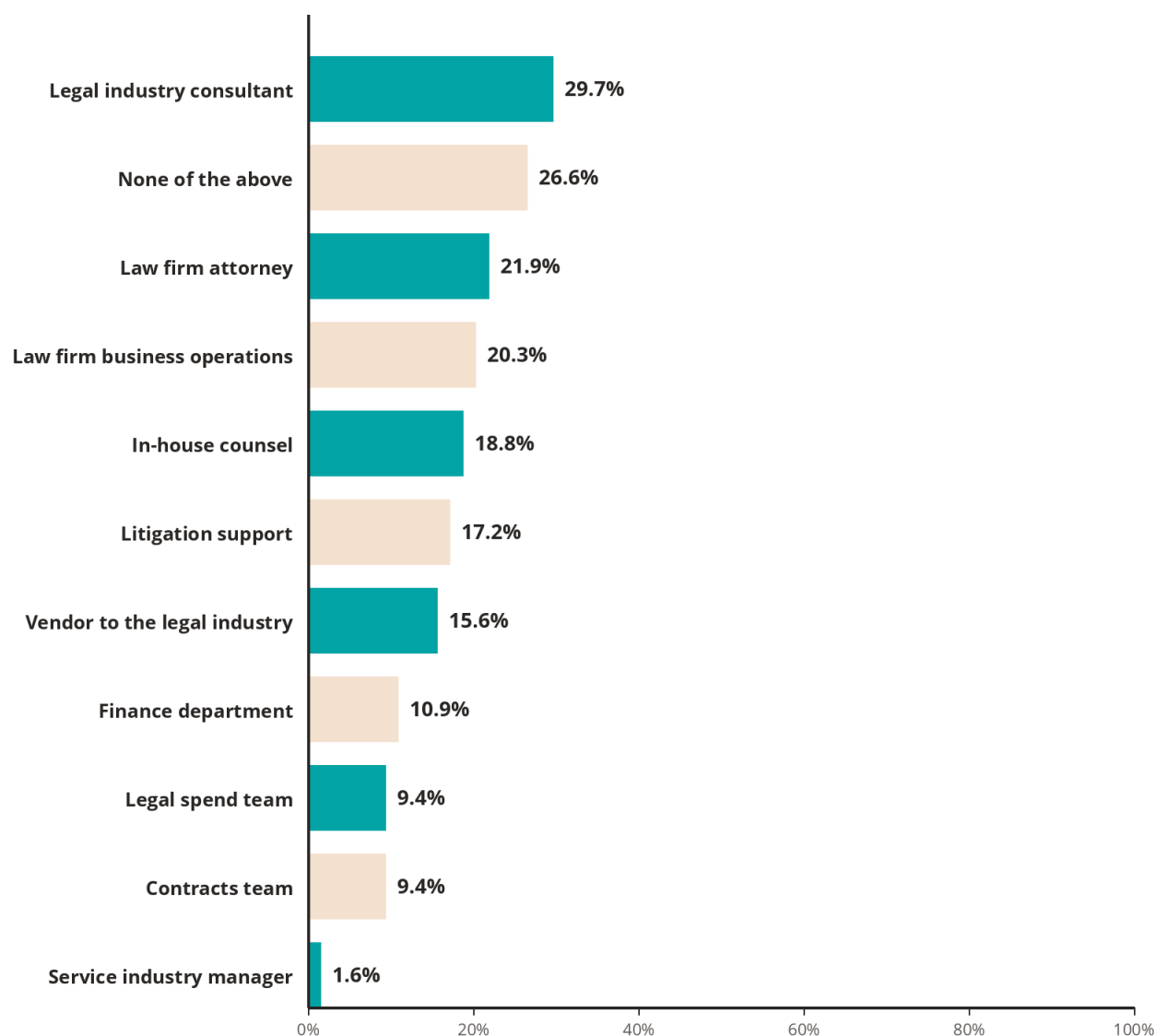
What is your annual cash incentive target (non-equity portion) given as a percentage of salary?



How many years of experience do you have in legal operations?

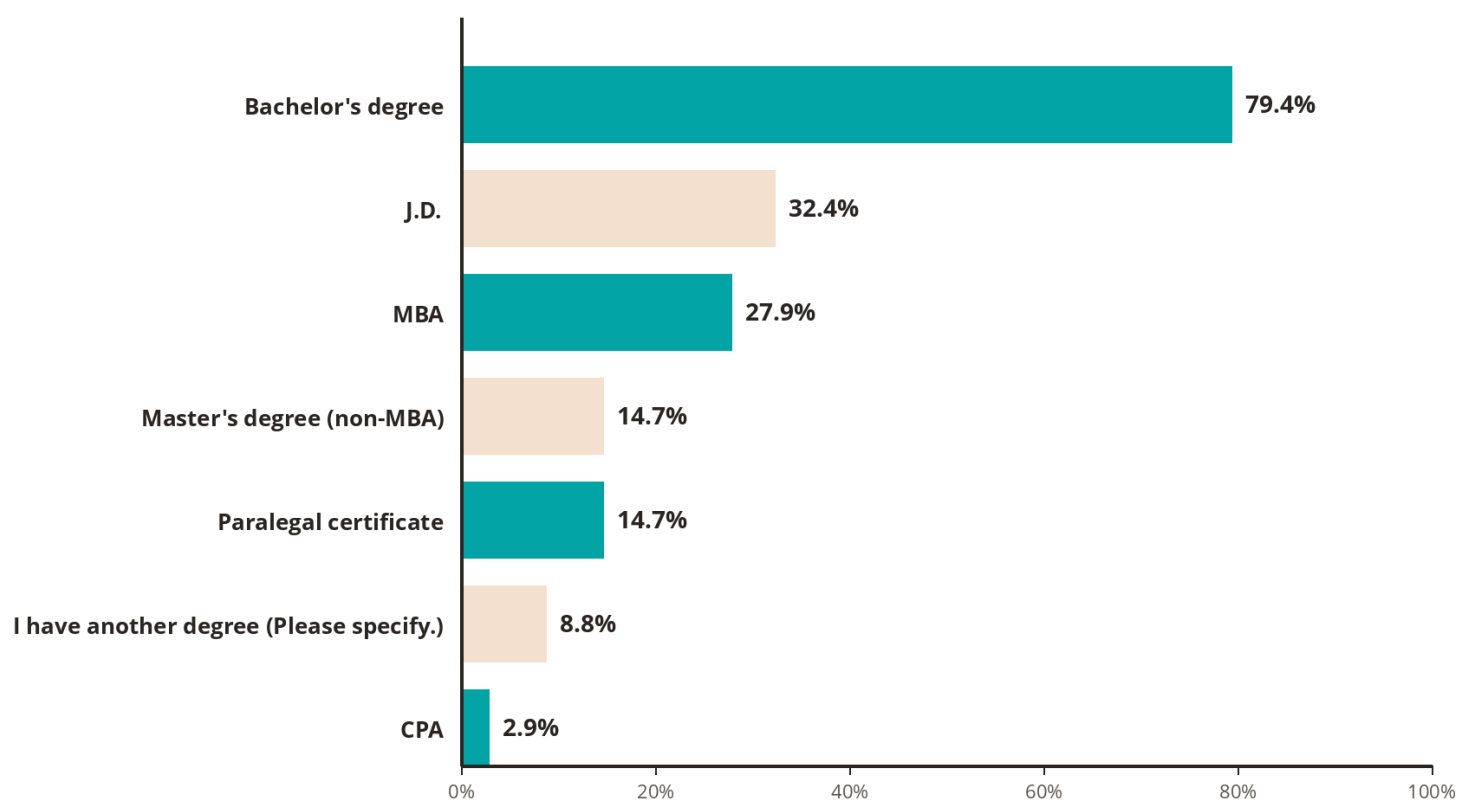


## Have you ever worked as a(n) or in the: (check all that apply)

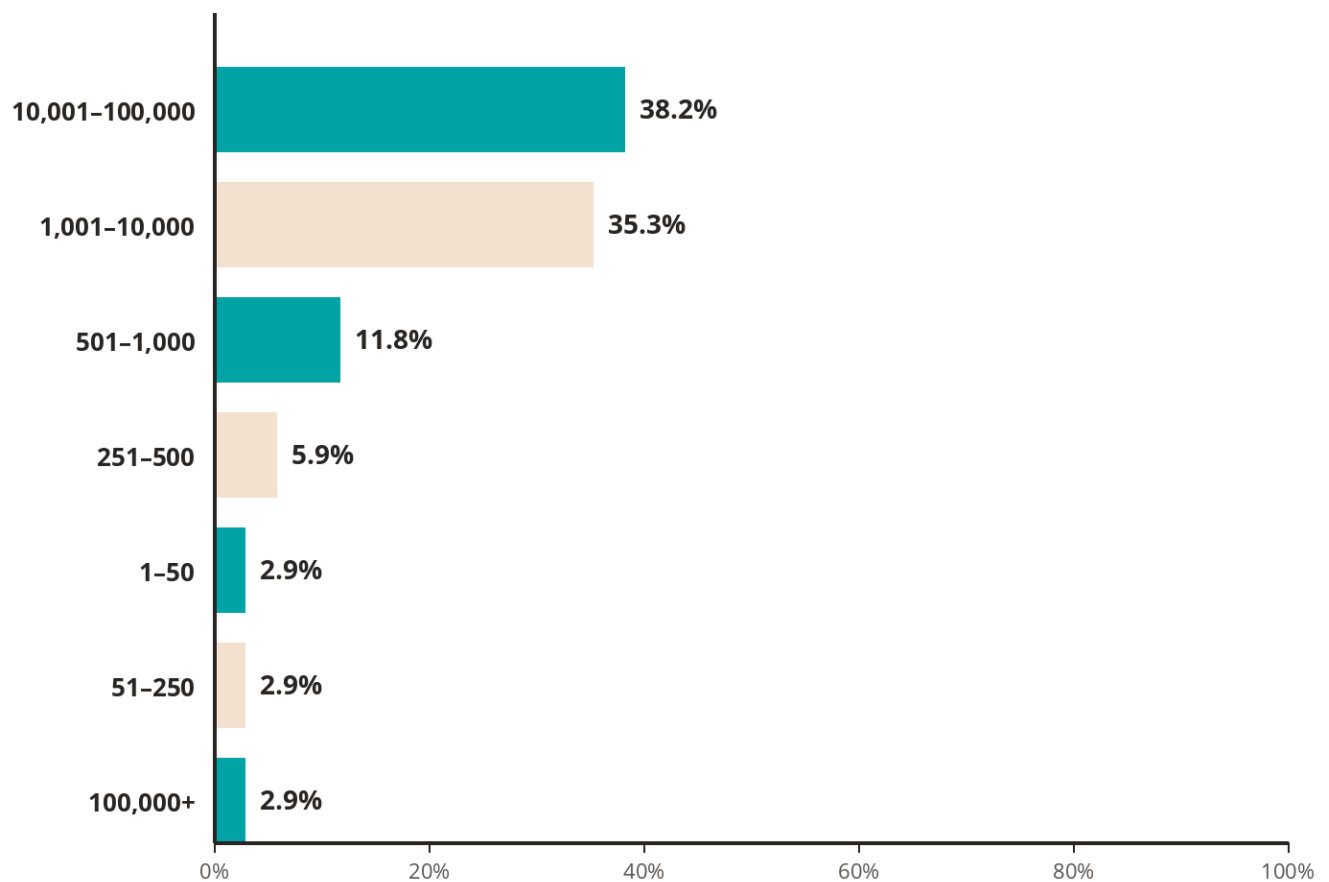




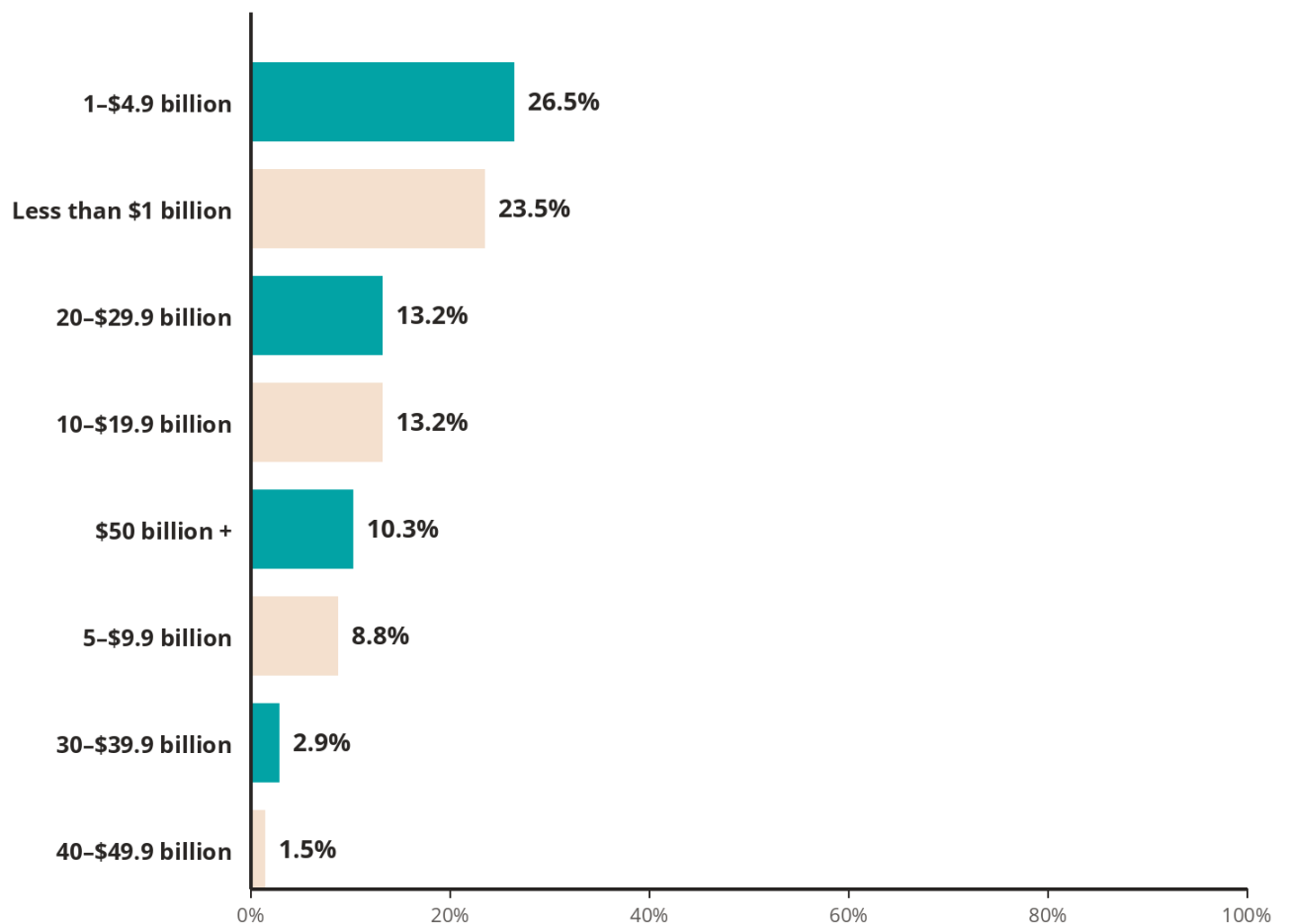
## Degrees obtained — please check ALL that apply.



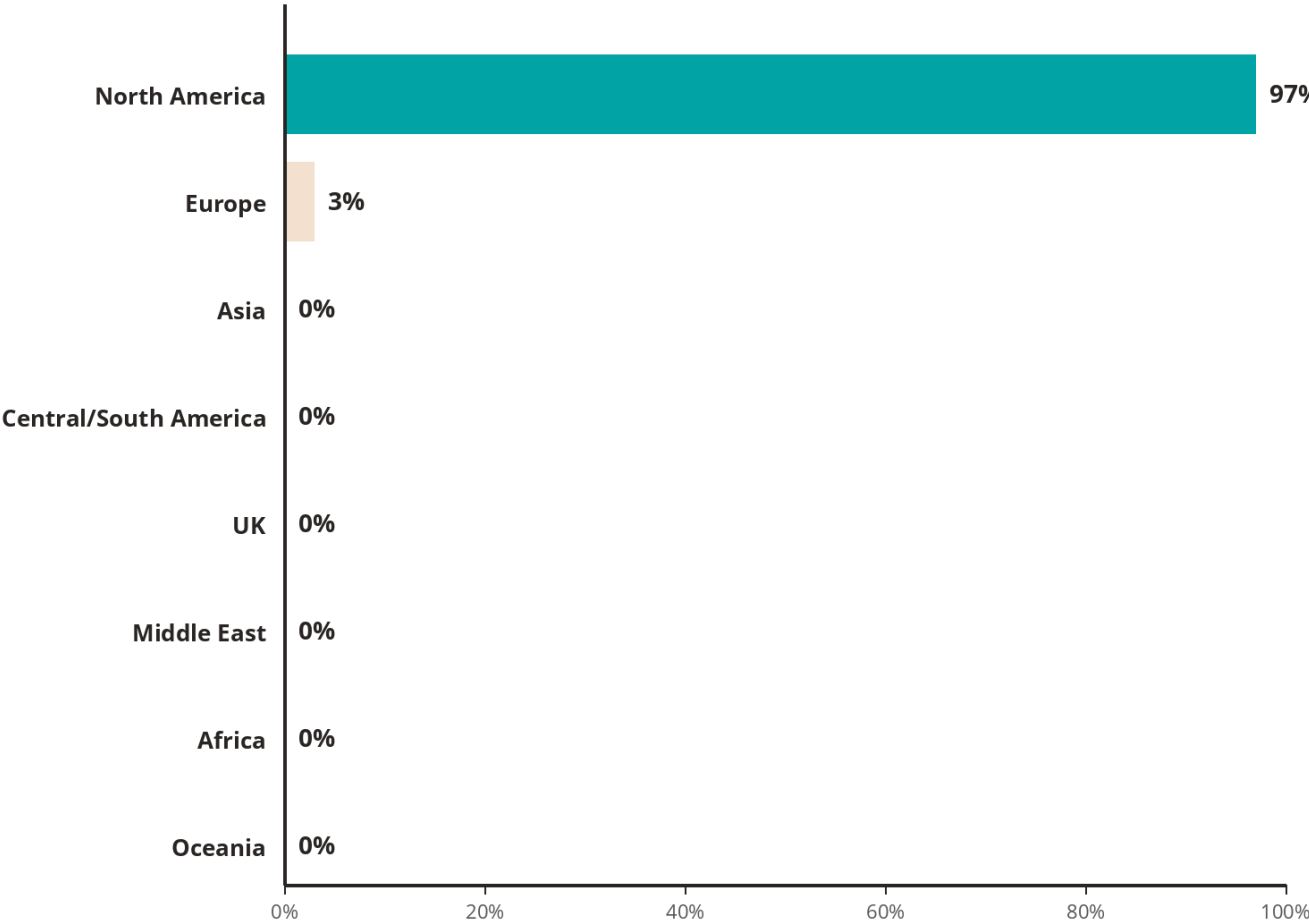
## How many employees does your company have?



## What is your company's annual global revenue?

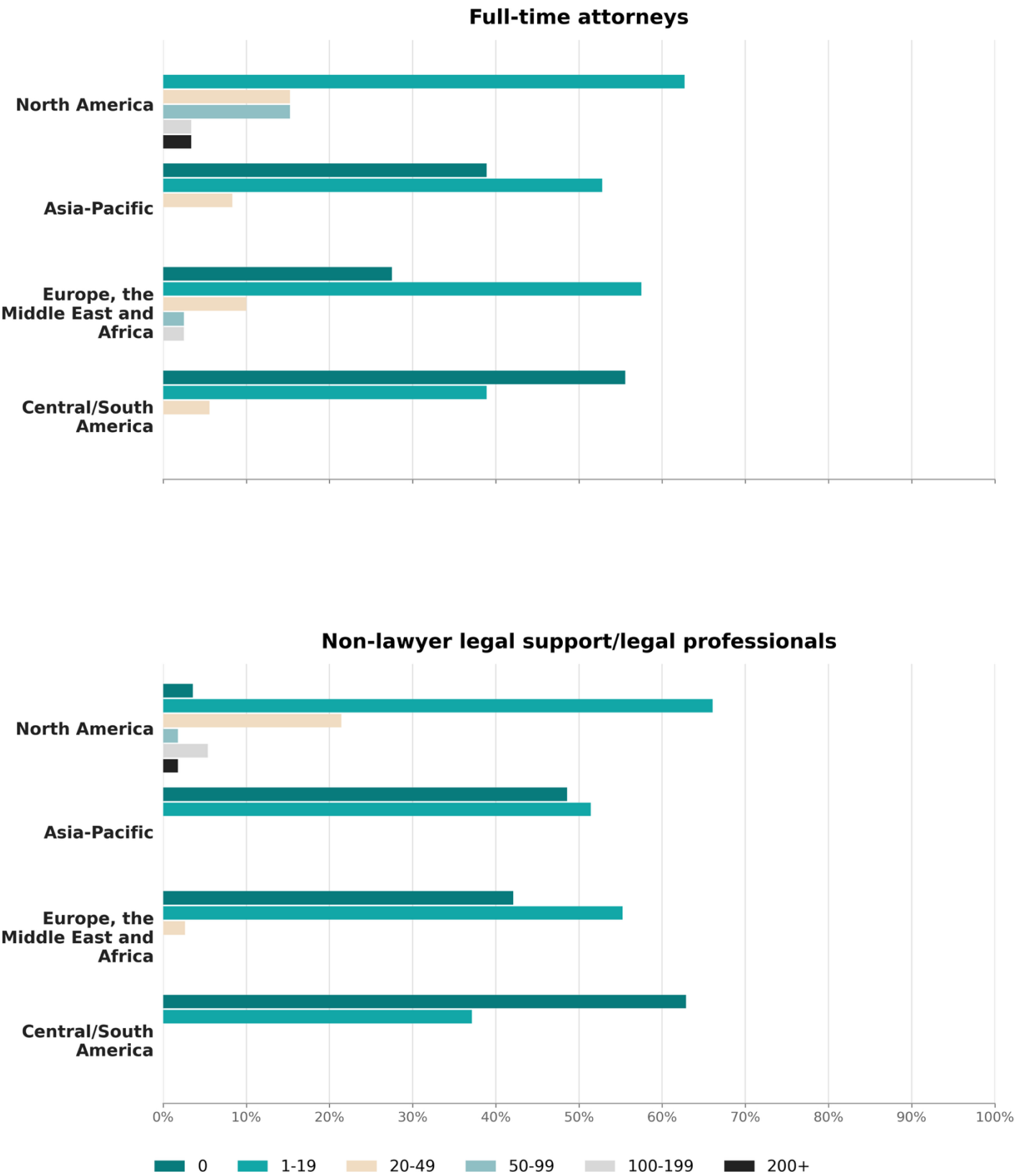


What geographic region are you based in?

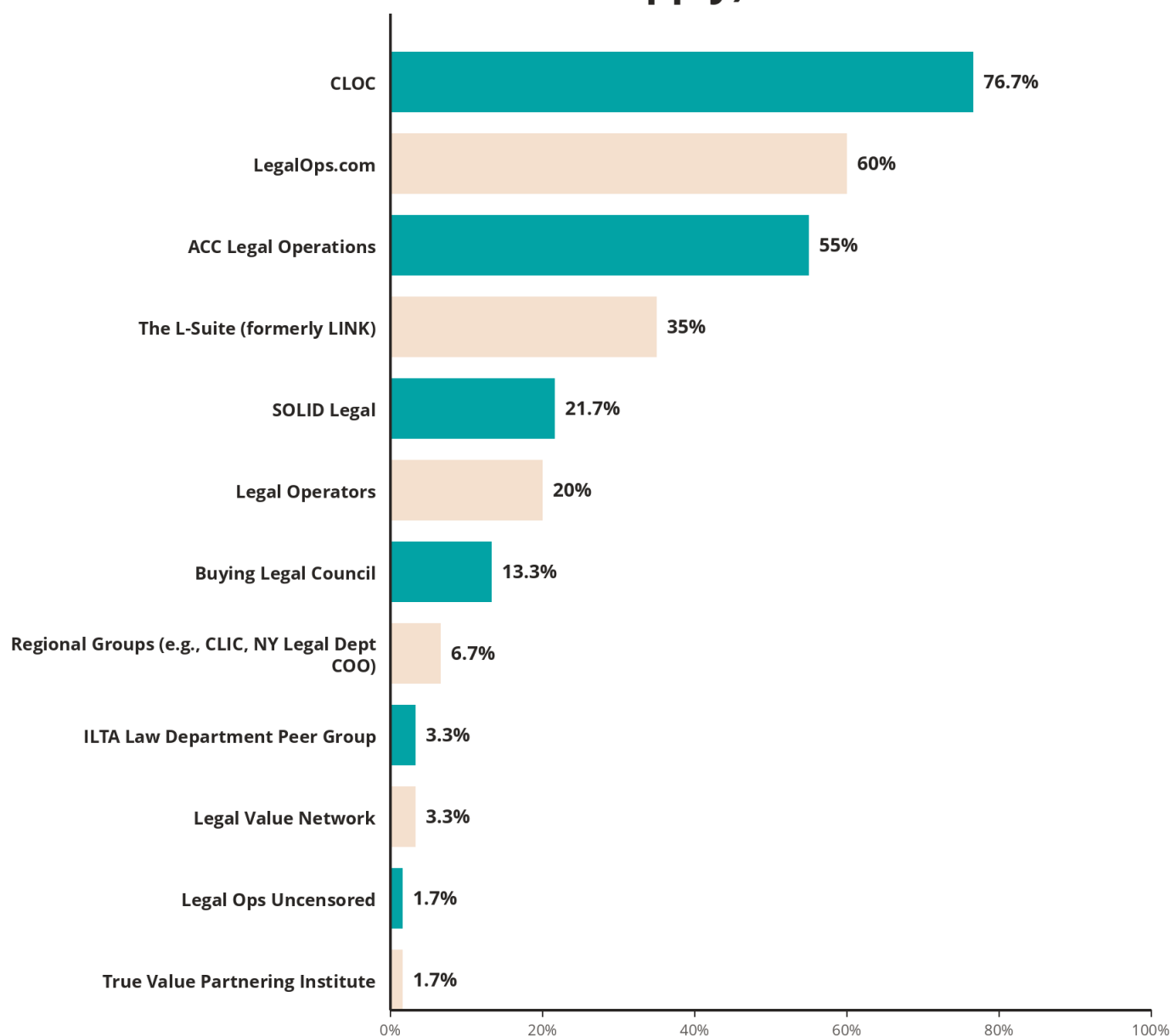


Q16:

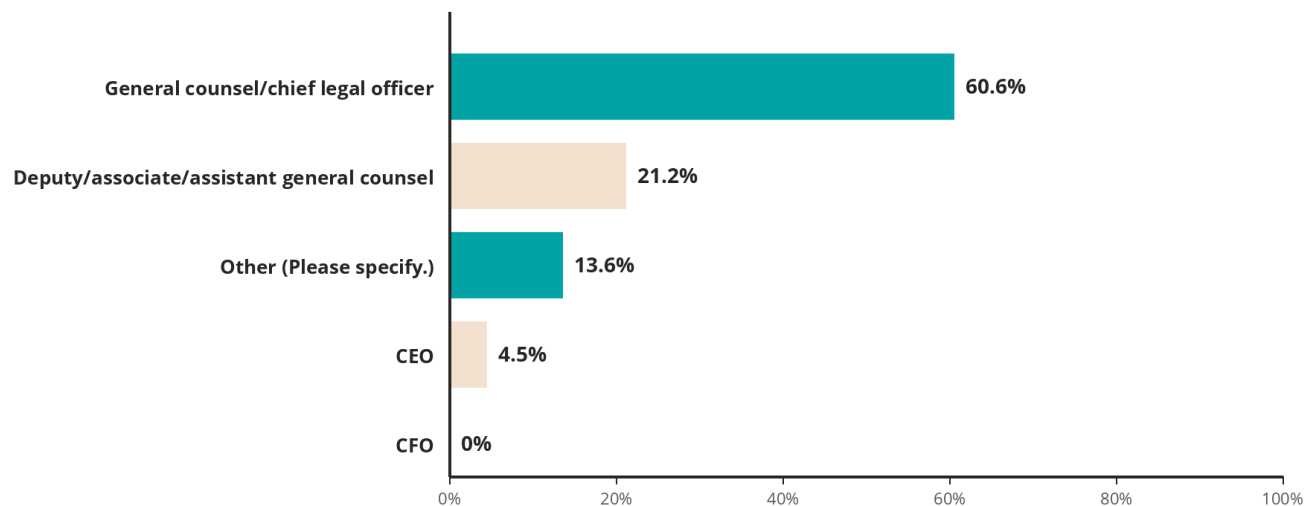
For each region, please indicate (A) the number of full-time attorneys and (B) the number of full-time equivalent non-lawyer legal support/legal professionals in your law department.



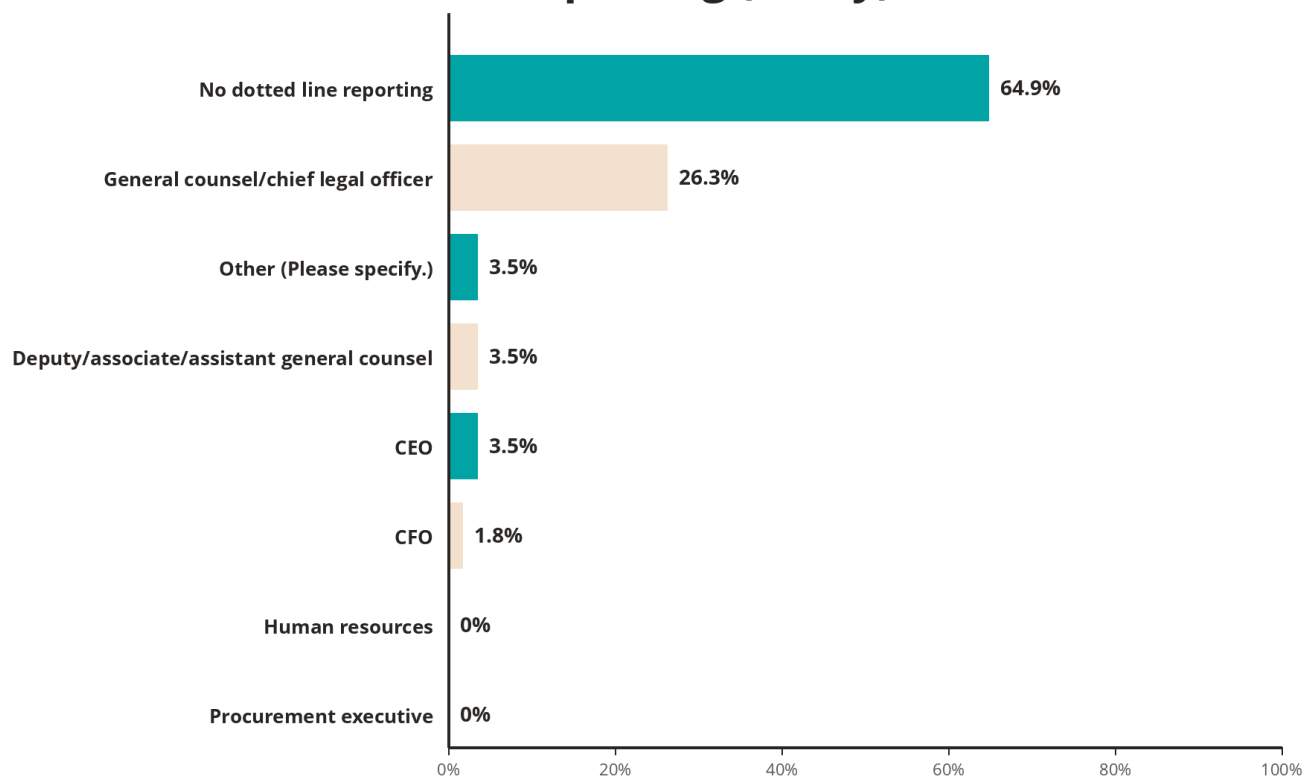
## Which of the following groups do you participate in? (check all that apply)



## To what position do you directly report?

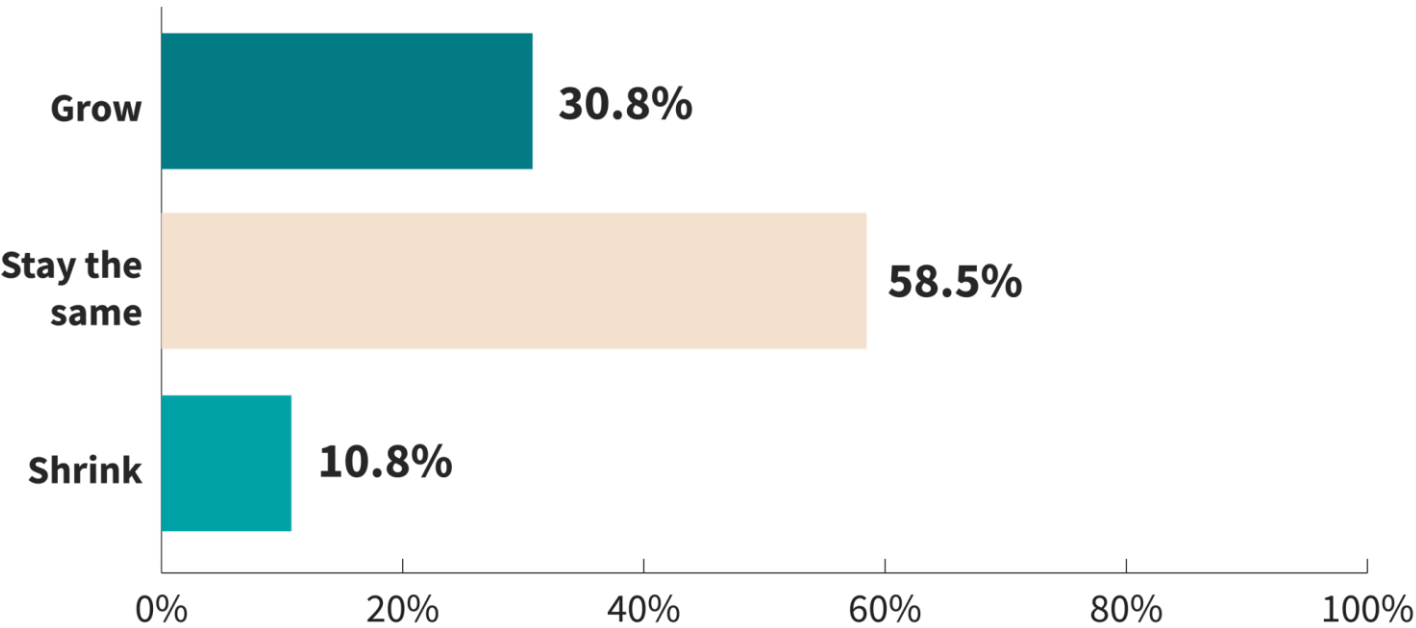


## To what positions or departments do you have dotted-line reporting (if any)?

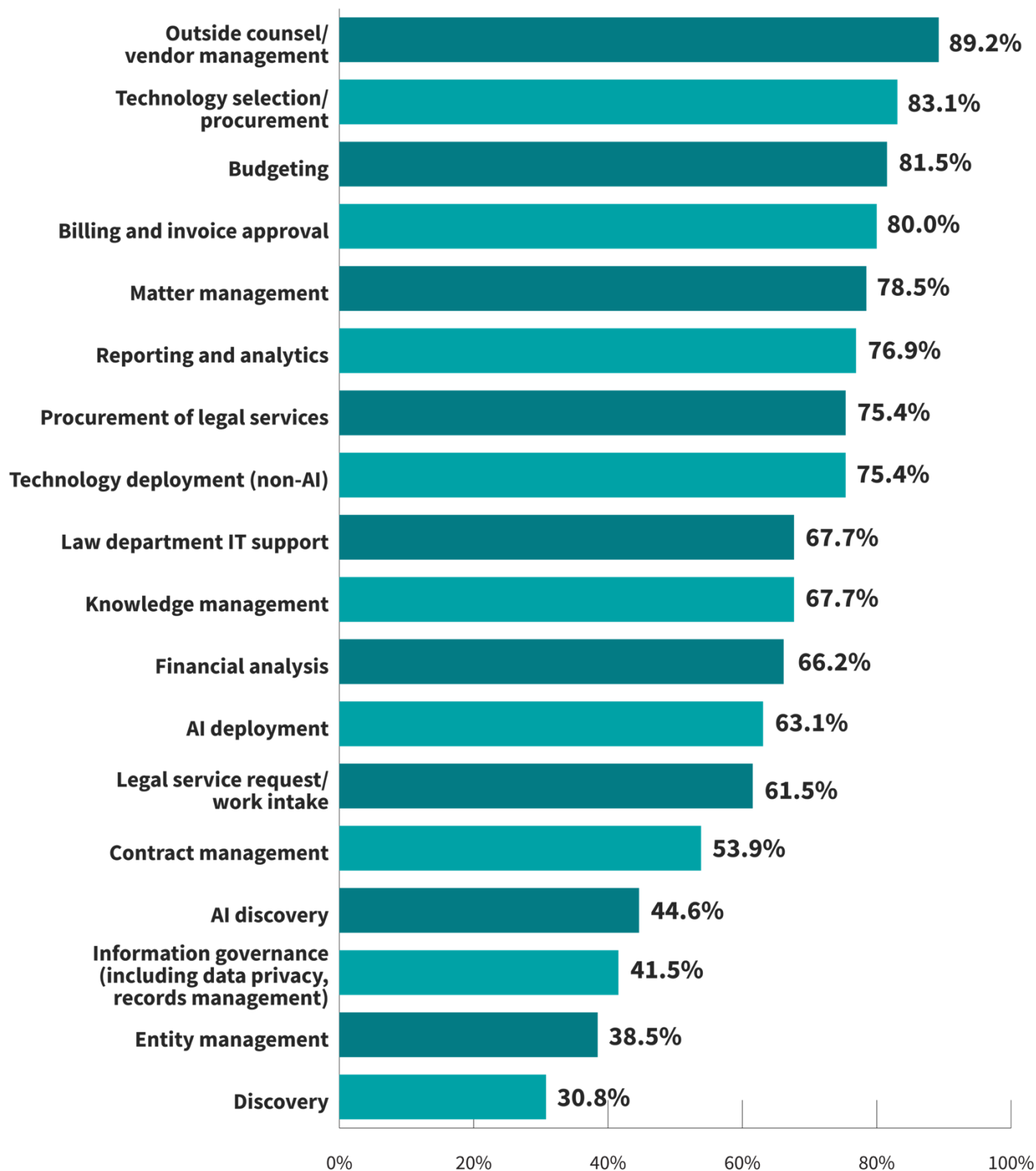




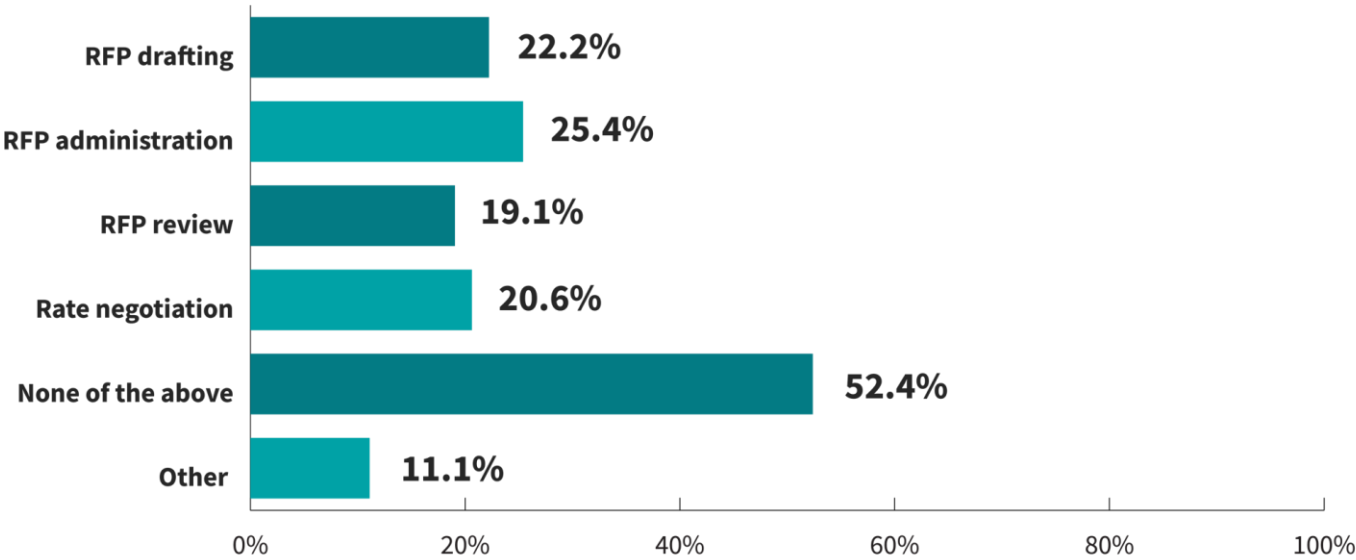
We expect the size of our legal ops team to \_\_\_\_ over the next 12 months.



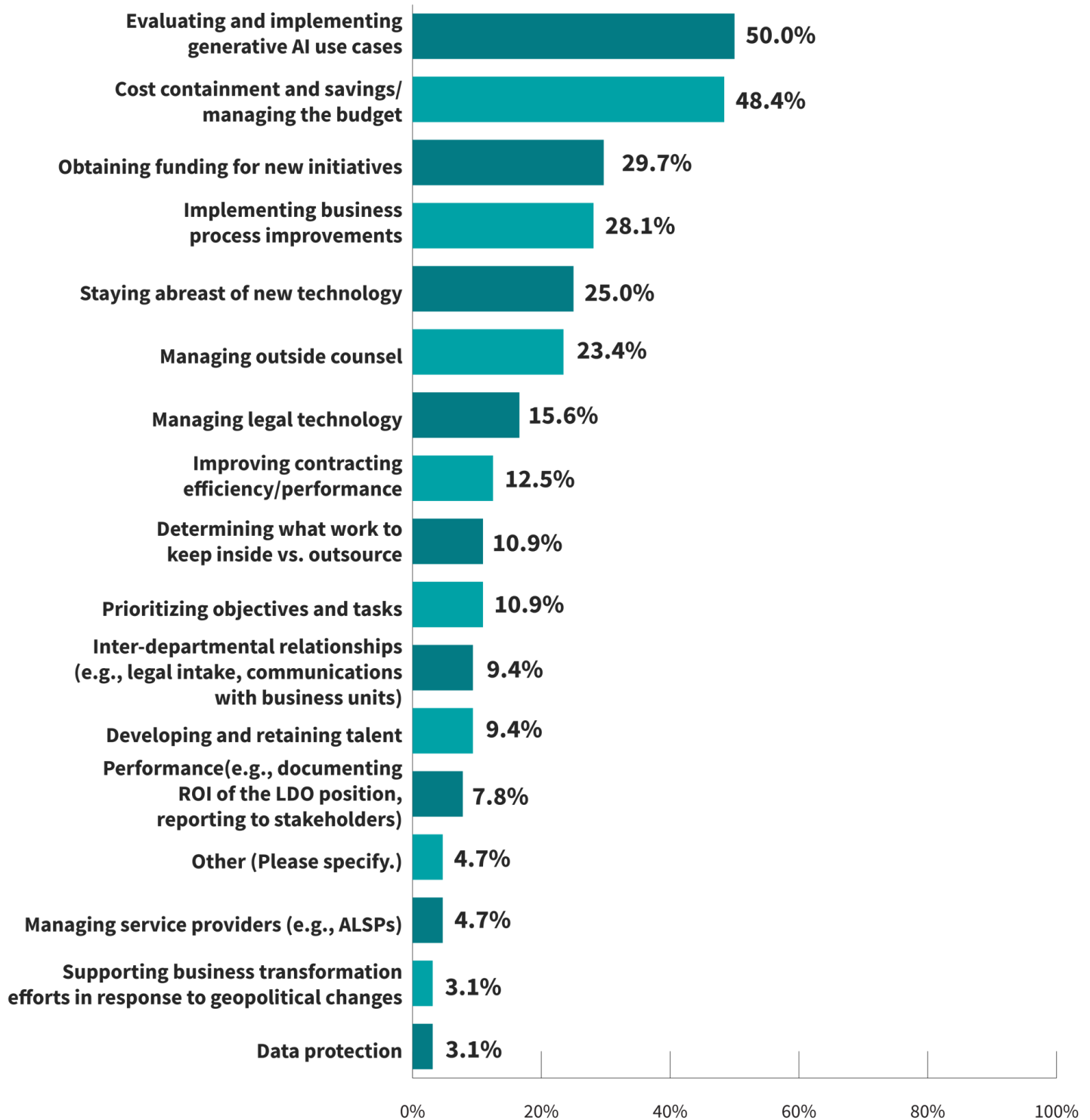
Our legal ops function is responsible for (select all that apply):



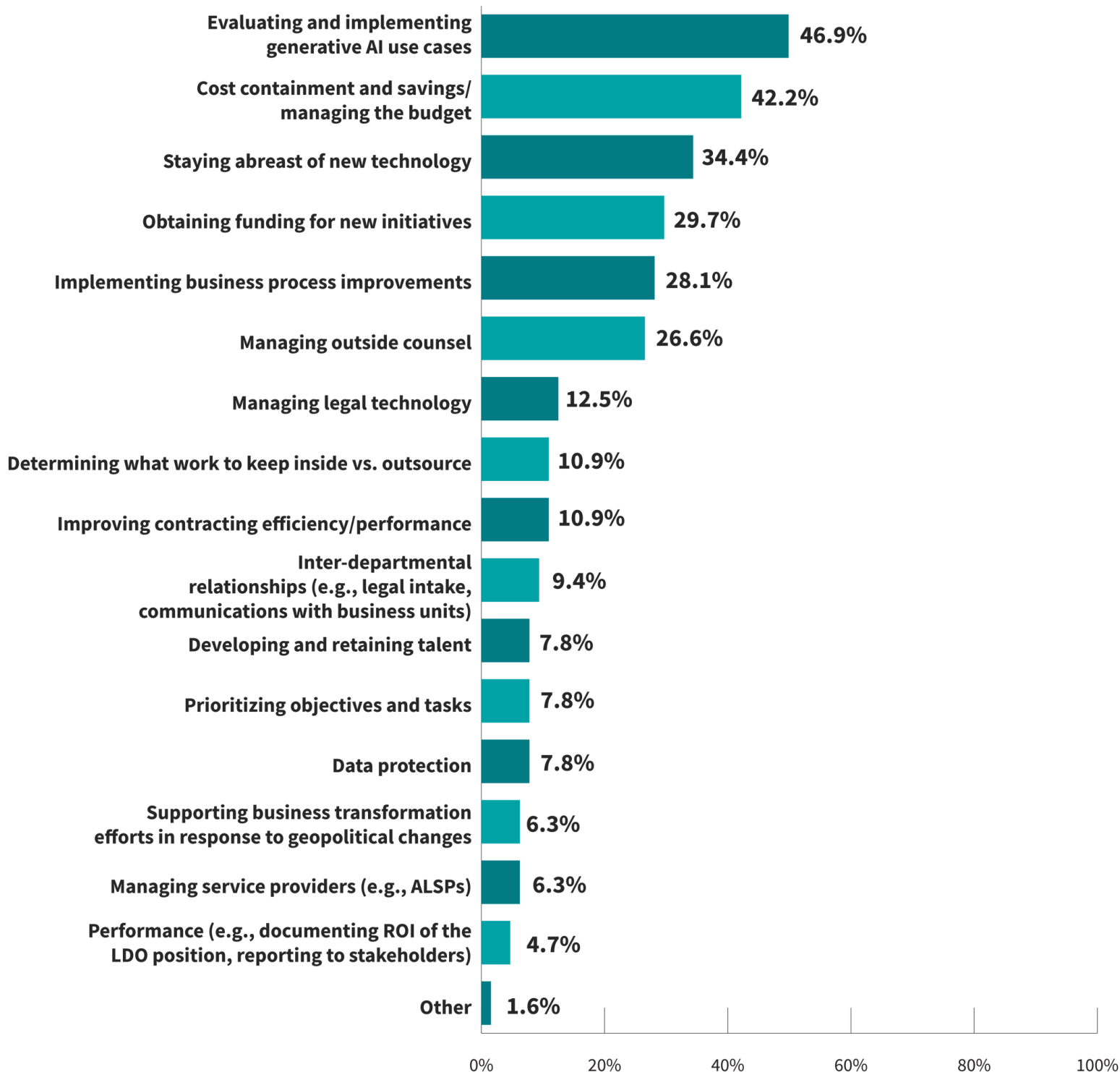
Our legal department utilizes our enterprise procurement function for  
(check all that apply):



As the LDO, what are the top three challenges you CURRENTLY face related to managing law department functions?



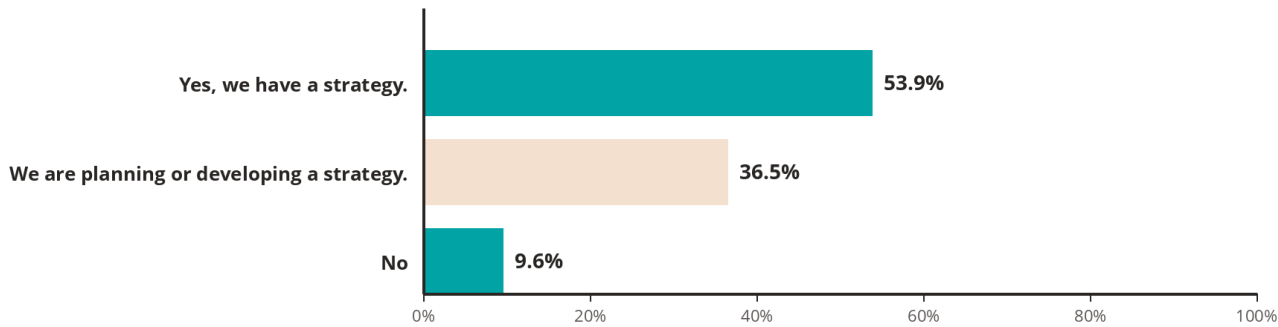
As the LDO, what are the top three challenges you EXPECT to face related to managing law department functions over the next year?



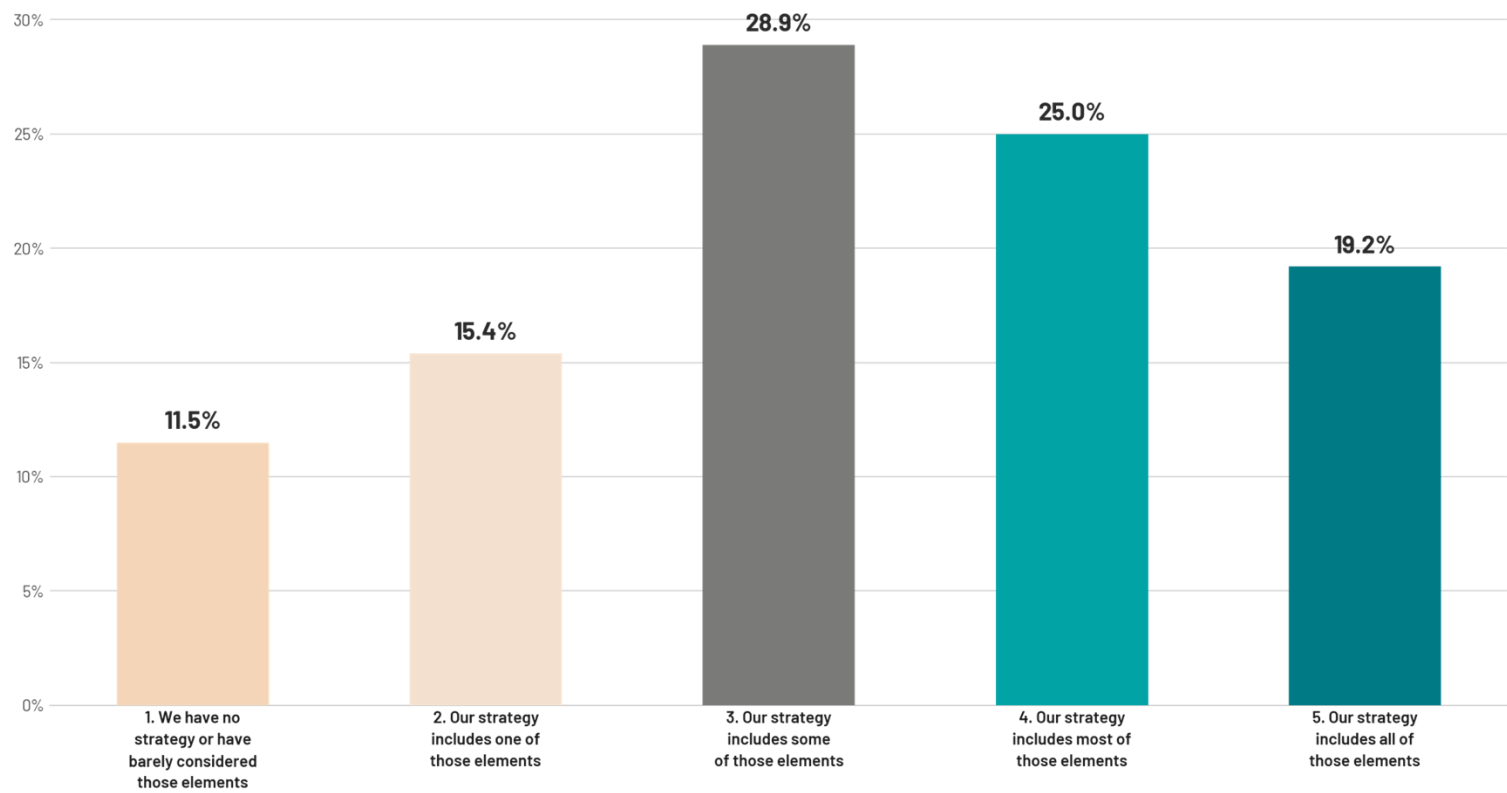
**For each technology listed below, please indicate the level of responsibility your legal operations team has.**

|                                                                                                             | Primary Responsibility | Some Influence | Not Responsible/<br>Selected at the Enterprise Level |
|-------------------------------------------------------------------------------------------------------------|------------------------|----------------|------------------------------------------------------|
| Enterprise Legal Management (ELM)                                                                           | 75.0%                  | 8.3%           | 16.7%                                                |
| E-Billing (Point Solution)                                                                                  | 89.1%                  | 6.5%           | 4.4%                                                 |
| Matter Management (Point Solution)                                                                          | 75.0%                  | 11.4%          | 13.6%                                                |
| Legal Spend Management (Point Solution)                                                                     | 88.9%                  | 6.7%           | 4.4%                                                 |
| Workflow or Business Process Automation Tools(Point Solution)                                               | 62.2%                  | 15.6%          | 22.2%                                                |
| Legal Service Request/Work Intake (Point Solution)                                                          | 75.6%                  | 11.1%          | 13.3%                                                |
| Document Management                                                                                         | 46.7%                  | 20.0%          | 33.3%                                                |
| Pre-Execution Contract Management (e.g., contract assembly, negotiation, review of third-party paper, etc.) | 43.8%                  | 31.3%          | 25.0%                                                |
| Post-Execution Contract Management (e.g., contract analysis, compliance, obligation management, etc.)       | 37.0%                  | 34.8%          | 28.3%                                                |
| Document Assembly                                                                                           | 31.7%                  | 22.0%          | 46.3%                                                |
| IP Management                                                                                               | 27.3%                  | 38.6%          | 34.1%                                                |
| E-Discovery                                                                                                 | 36.7%                  | 31.8%          | 31.8%                                                |
| Litigation Hold                                                                                             | 52.3%                  | 27.3%          | 20.5%                                                |
| Board Management                                                                                            | 27.3%                  | 27.3%          | 45.5%                                                |
| Entity Management                                                                                           | 41.3%                  | 26.1%          | 32.6%                                                |
| Claims Management                                                                                           | 23.1%                  | 20.5%          | 56.4%                                                |
| RFP Management                                                                                              | 41.9%                  | 18.6%          | 39.5%                                                |
| Electronic Records Management                                                                               | 24.4%                  | 19.5%          | 56.1%                                                |
| Electronic Signature                                                                                        | 25.0%                  | 20.5%          | 54.6%                                                |
| GRC/Compliance                                                                                              | 7.3%                   | 31.7%          | 60.1%                                                |
| Privacy Reporting                                                                                           | 15.0%                  | 25.0%          | 60.0%                                                |
| Knowledge Management                                                                                        | 44.2%                  | 37.2%          | 18.6%                                                |
| AI Assistants (e.g., Harvey, Legora, etc.)                                                                  | 39.1%                  | 26.1%          | 34.8%                                                |
| New generative AI tools                                                                                     | 41.3%                  | 39.1%          | 19.6%                                                |

Do you have or plan to develop a legal department technology strategy or multiyear roadmap?

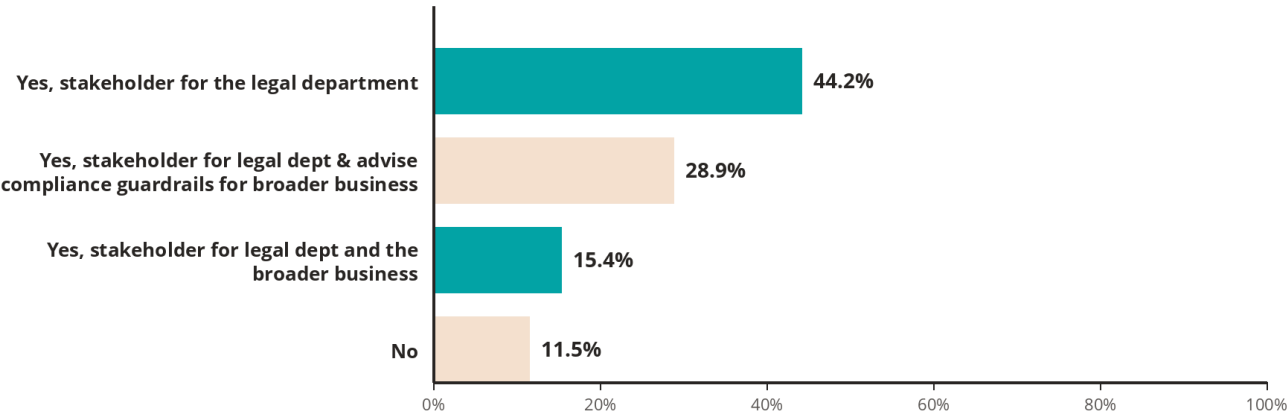


On a scale of 1 to 5, how sophisticated is your legal AI strategy?  
A sophisticated strategy would include elements such as the use of AI internally,  
adopting enterprise-wide AI tools, guidelines for use, and a future roadmap.



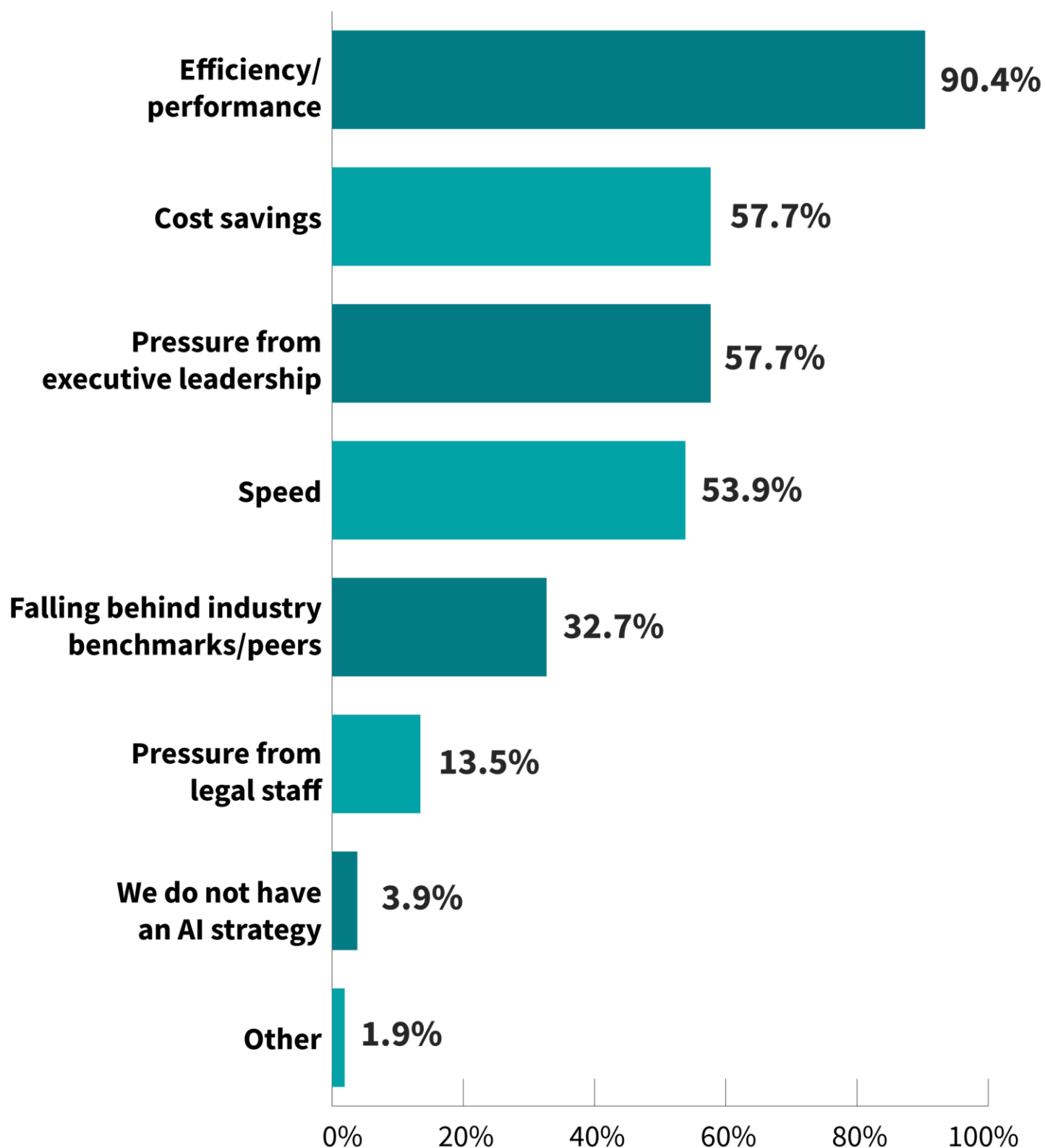


Are you involved in GenAI decision making?

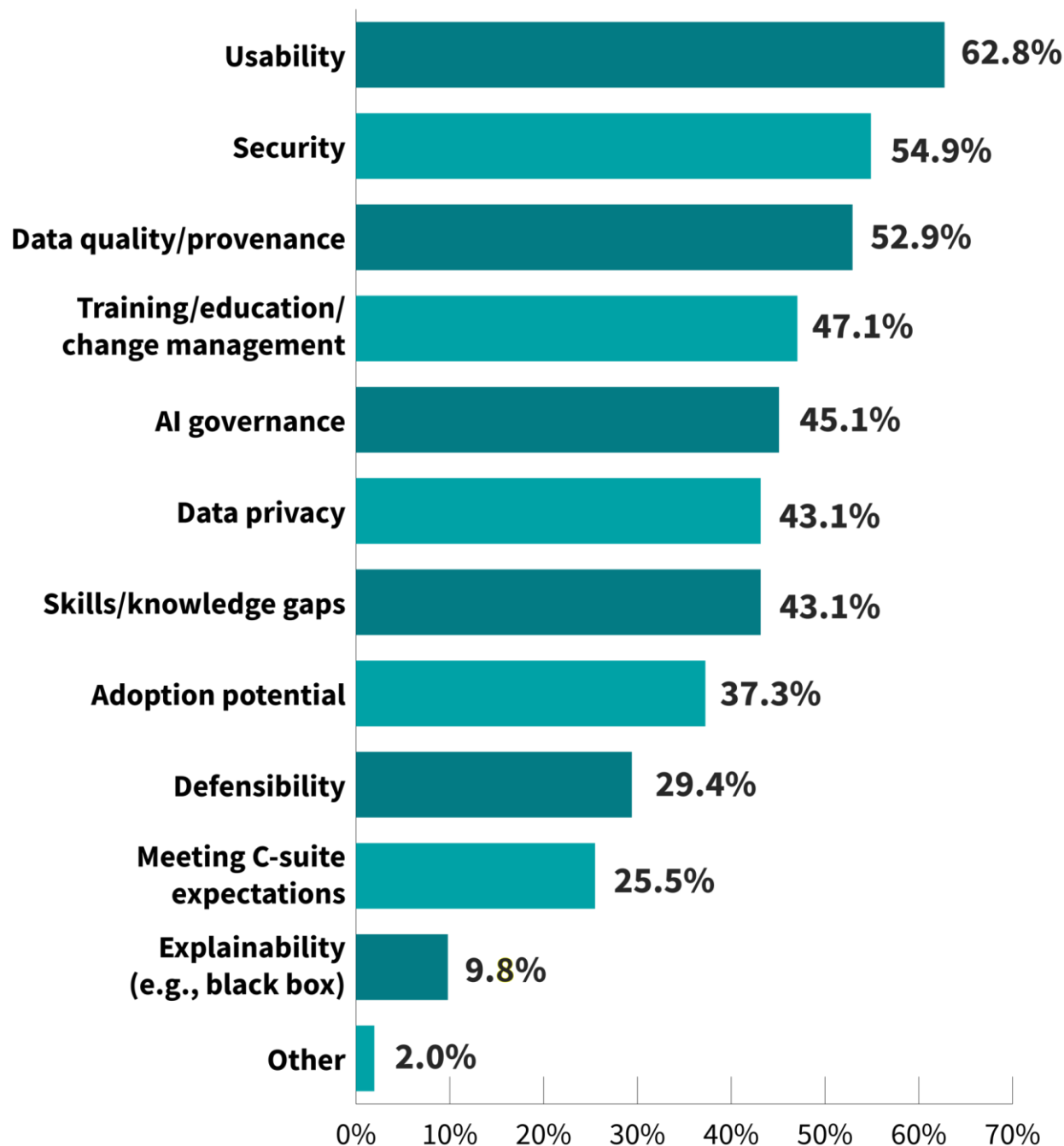


Q29:

**What priorities are driving your AI strategy?**



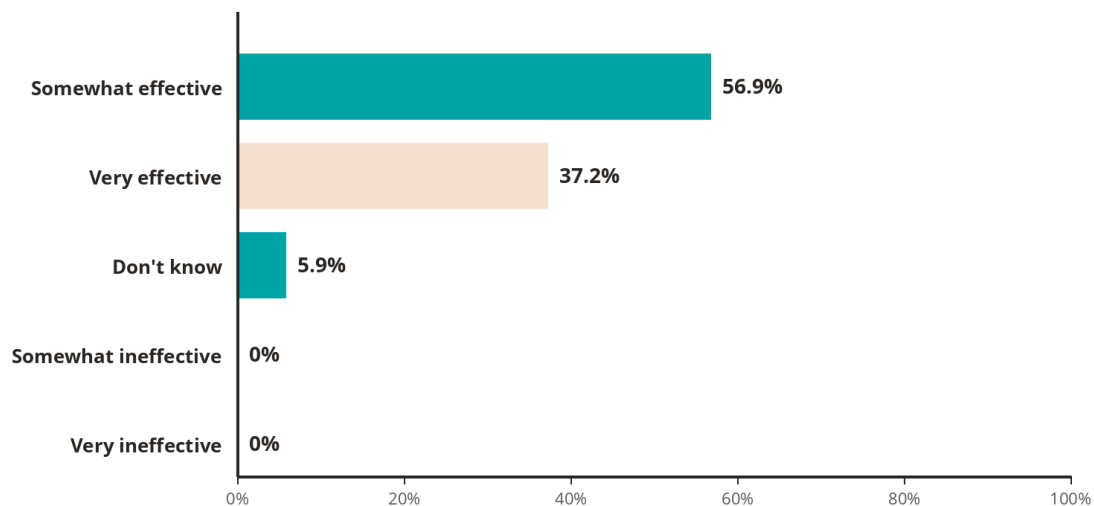
What are the top concerns your AI strategy is built to address?



**Technologies in place longer than three years  
at a majority of law departments**

|                                          |       |
|------------------------------------------|-------|
| E-Billing (Point Solutions)              | 62.2% |
| Electronic Signature                     | 56.1% |
| Entity Management                        | 55.0% |
| Legal Spend Management (Point Solutions) | 51.2% |
| Matter Management (Point Solutions)      | 51.2% |

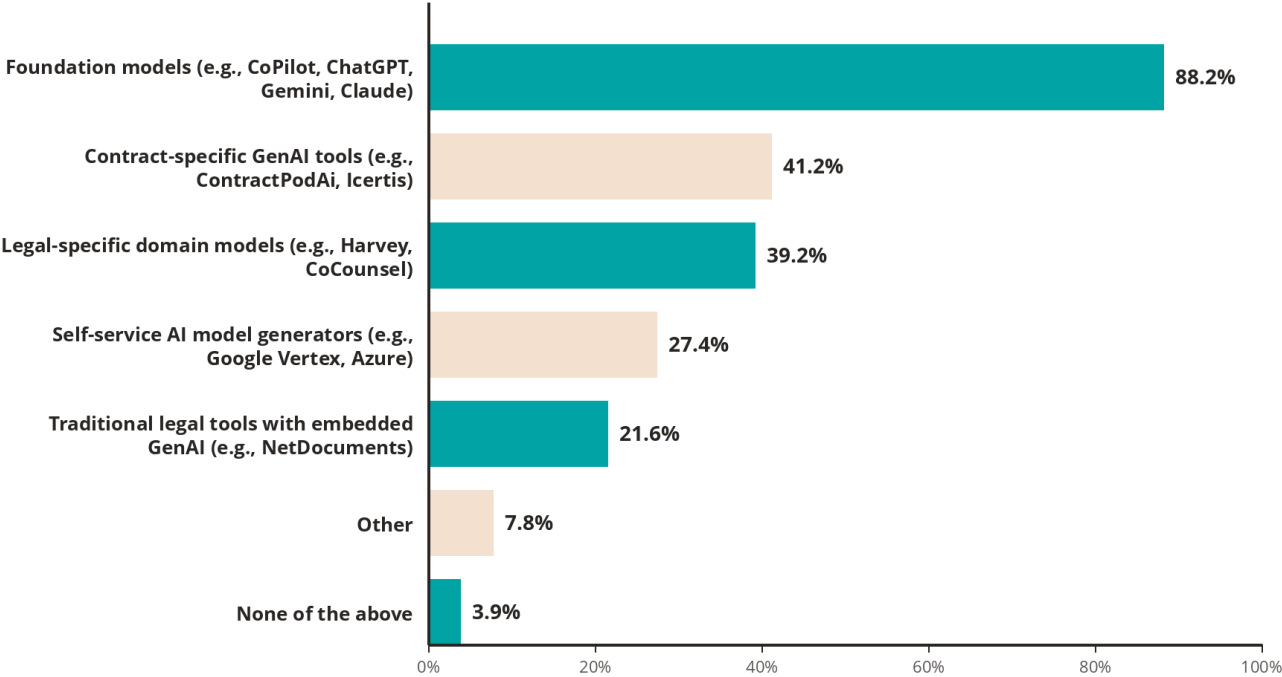
**Please rate your outside law firms' ability to protect your data.**



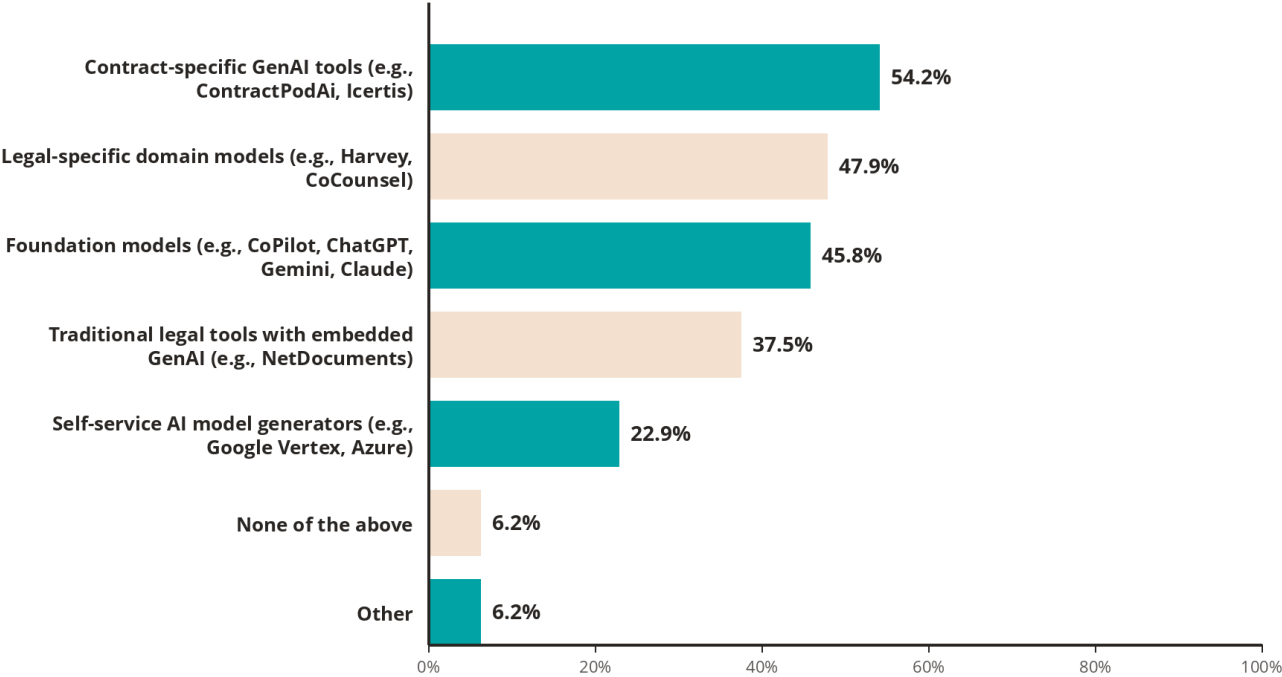
## GenAI Use Cases

|                                  | Our <b>law department</b><br>always or sometimes<br>uses GenAI/GPT for<br>the following: | Our <b>law firms</b><br>always or sometimes<br>use GenAI/GPT for<br>the following<br>on our behalf: |
|----------------------------------|------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|
| Legal research                   | <b>72.3%</b>                                                                             | <b>23.4%</b>                                                                                        |
| E-Discovery                      | <b>32.6%</b>                                                                             | <b>27.7%</b>                                                                                        |
| Understanding new legal concepts | <b>57.5%</b>                                                                             | <b>8.7%</b>                                                                                         |
| Drafting documents               | <b>59.6%</b>                                                                             | <b>19.6%</b>                                                                                        |
| Document analysis                | <b>65.2%</b>                                                                             | <b>29.2%</b>                                                                                        |
| Document review                  | <b>55.3%</b>                                                                             | <b>27.7%</b>                                                                                        |
| Document summarization           | <b>68.8%</b>                                                                             | <b>22.9%</b>                                                                                        |
| Due diligence                    | <b>29.2%</b>                                                                             | <b>12.8%</b>                                                                                        |
| Concept extraction               | <b>51.1%</b>                                                                             | <b>14.9%</b>                                                                                        |
| Contract clause analysis         | <b>56.5%</b>                                                                             | <b>19.2%</b>                                                                                        |
| Contract clause library creation | <b>28.9%</b>                                                                             | <b>15.2%</b>                                                                                        |
| Data migration                   | <b>17.8%</b>                                                                             | <b>8.7%</b>                                                                                         |
| Legal information desk/help desk | <b>28.3%</b>                                                                             | <b>6.5%</b>                                                                                         |
| Legal intake or Front door       | <b>8.7%</b>                                                                              | <b>6.4%</b>                                                                                         |
| AI chatbot                       | <b>46.8%</b>                                                                             | <b>12.8%</b>                                                                                        |
| Translation                      | <b>45.7%</b>                                                                             | <b>12.8%</b>                                                                                        |

Select the types of GenAI tools that you are using within your legal department.

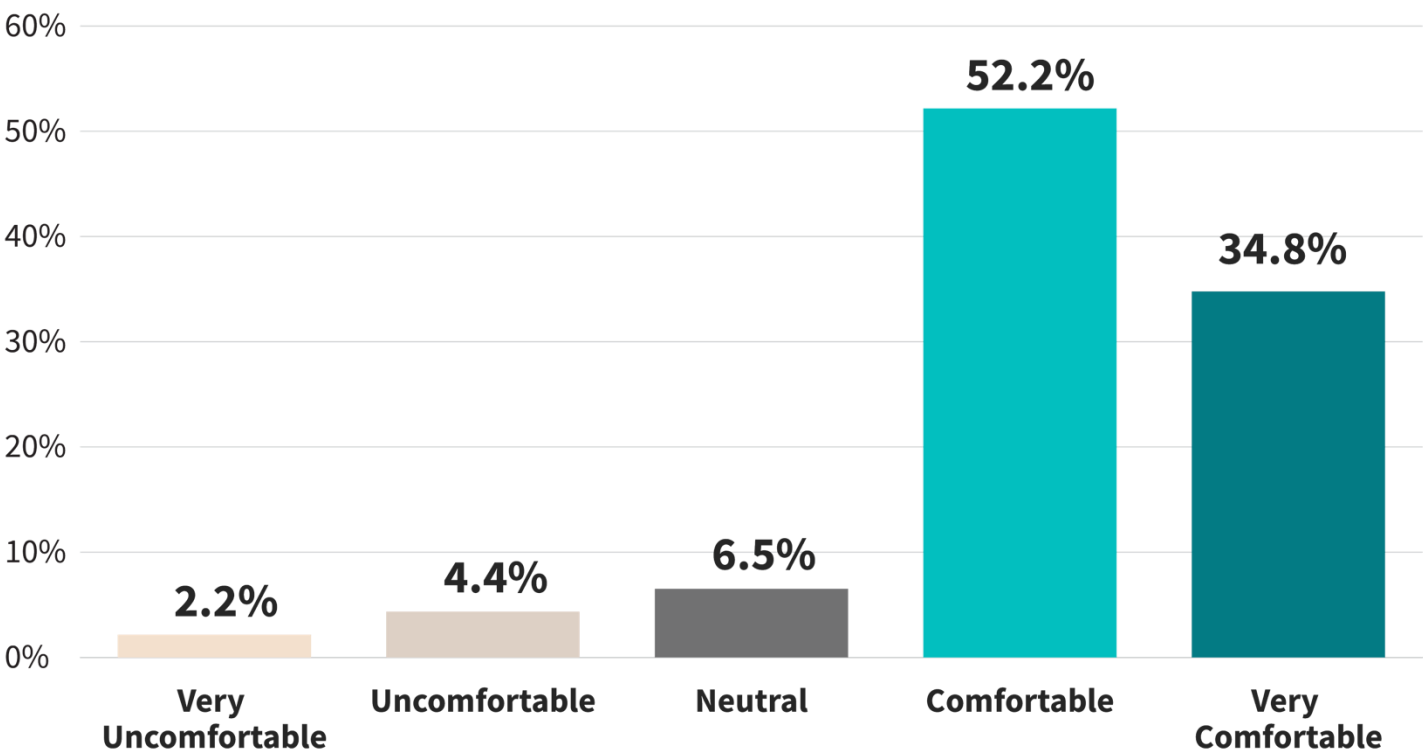


Which GenAI tools are you considering using in the near future?

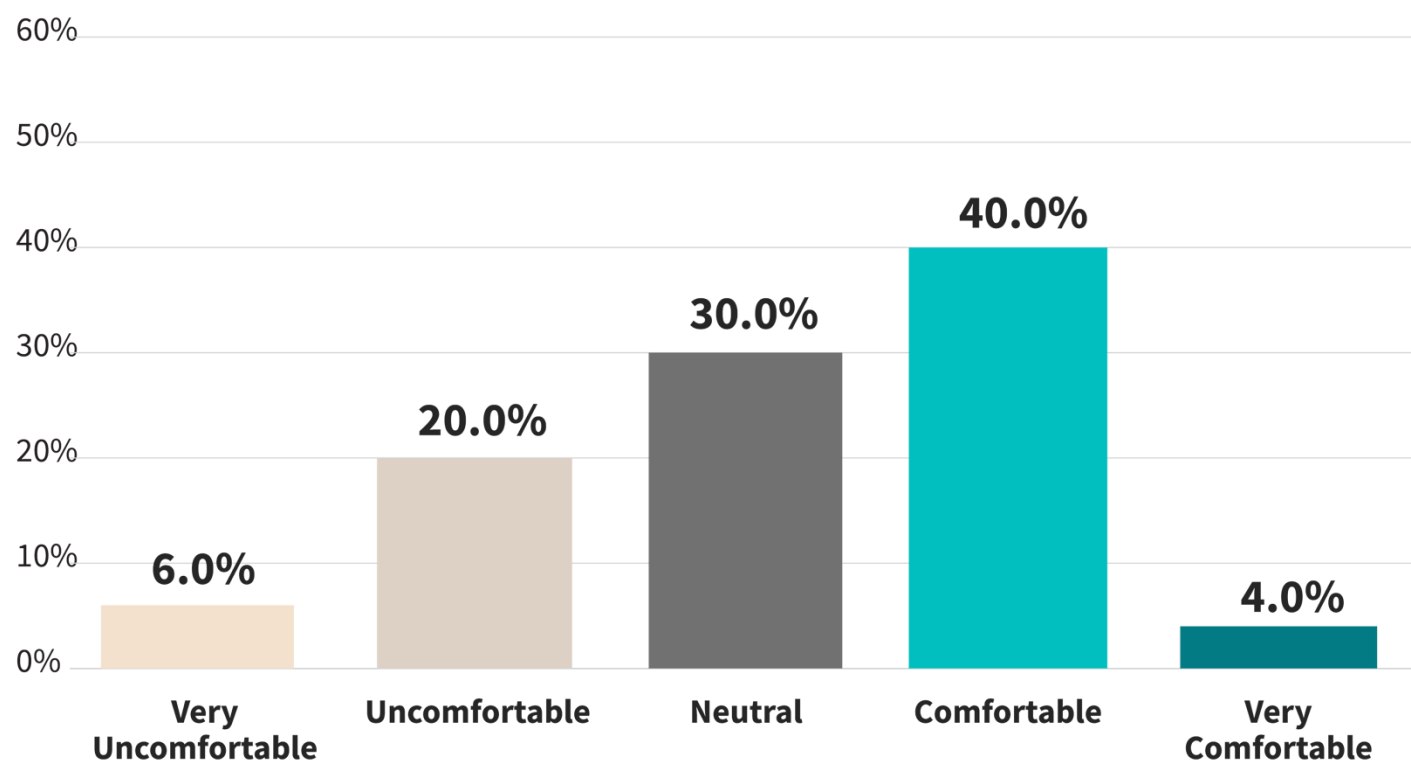




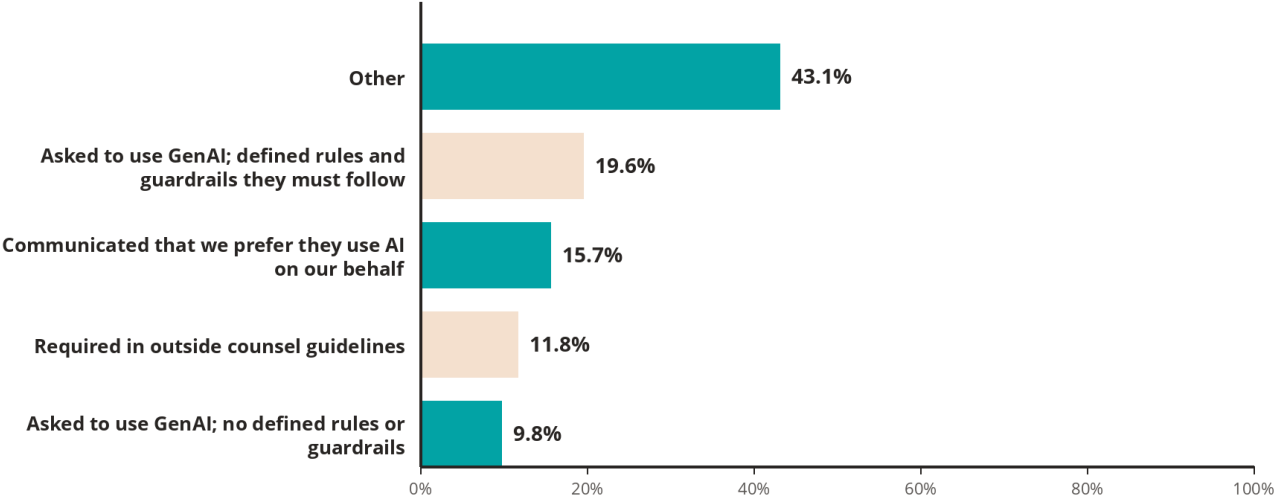
What is your level of comfort with your own use of GenAI tools?



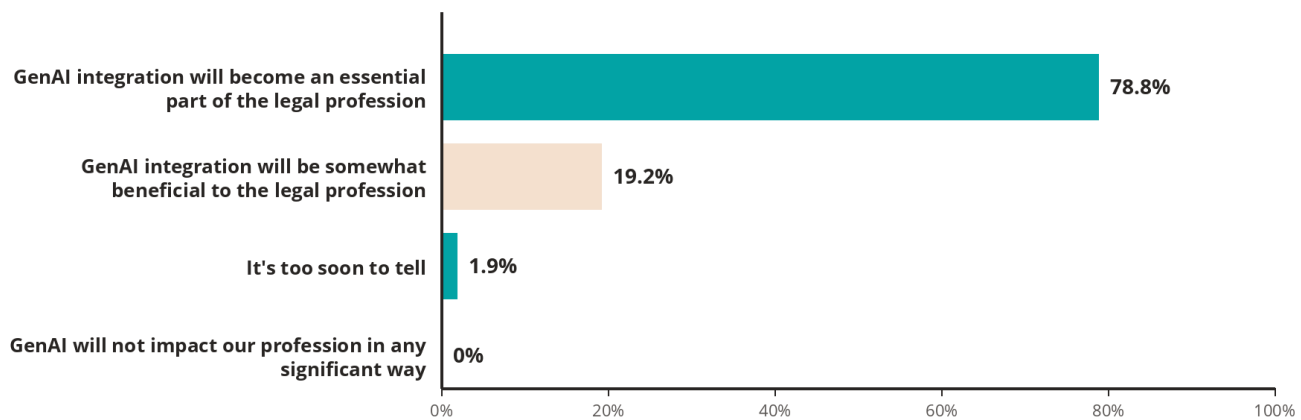
What is your level of comfort with your lawyers' use of GenAI tools?



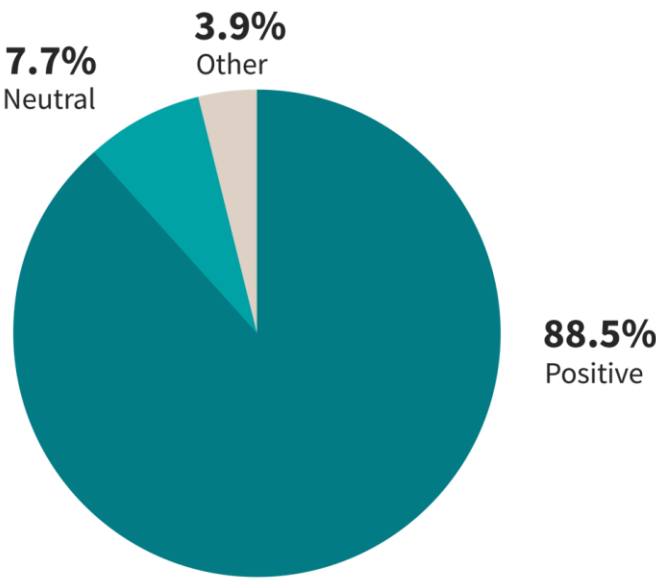
What guidance, if any, have you provided your law firms regarding their use of GenAI on your behalf?



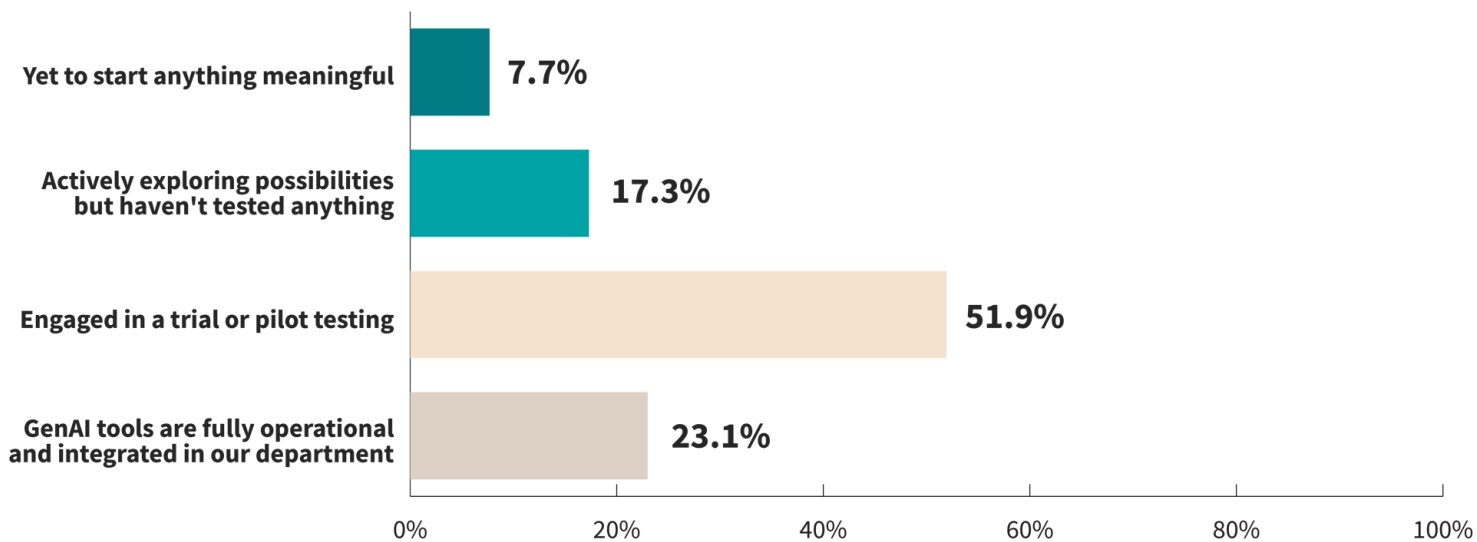
## What are your views on GenAI within the legal profession?

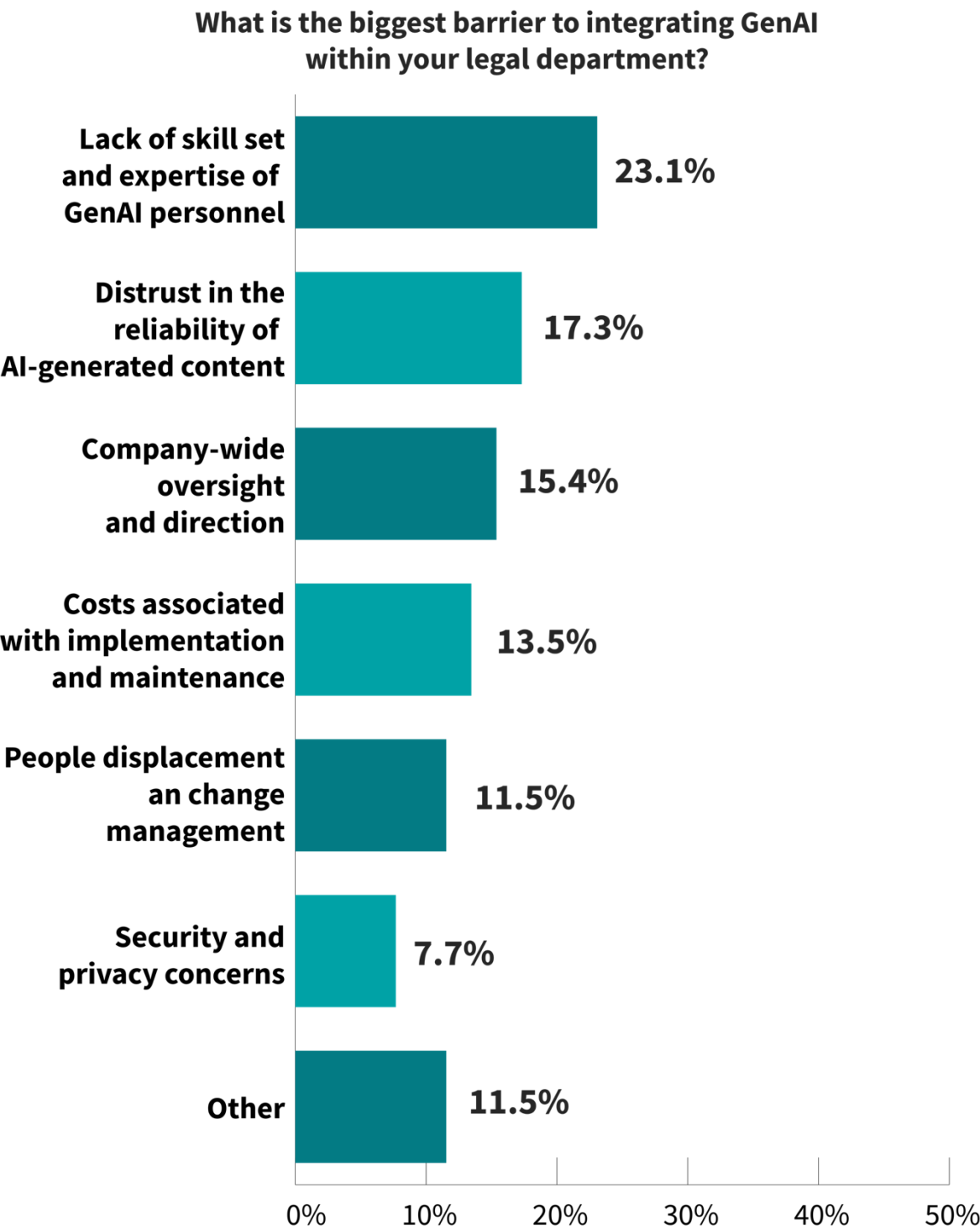


Do you think the overall impact of GenAI will be:

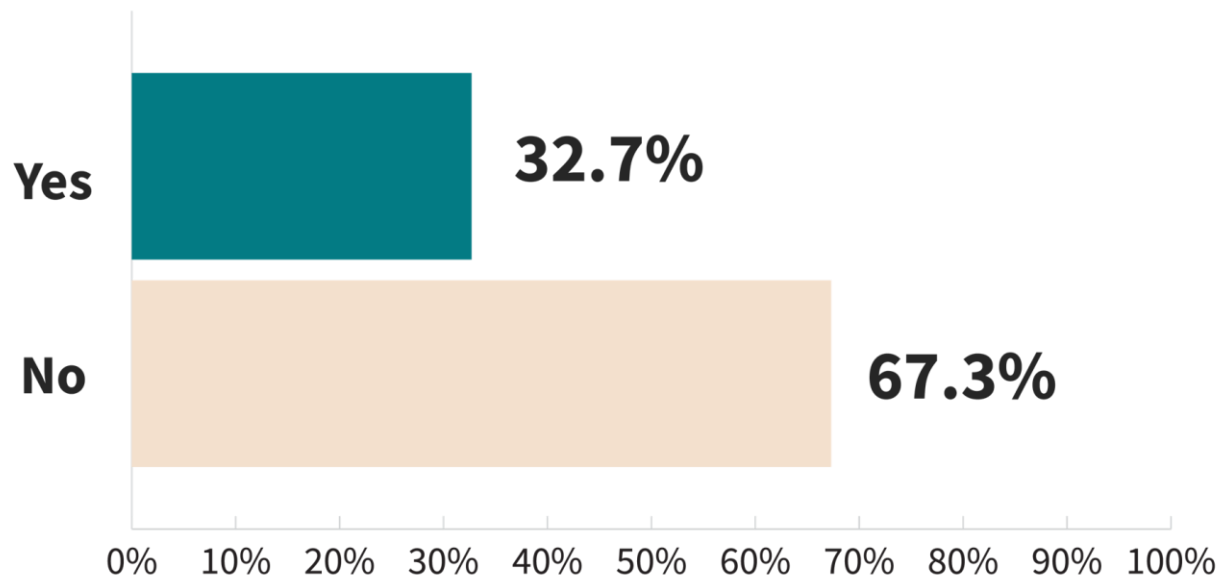


Which stage best describes your GenAI journey within your legal department?



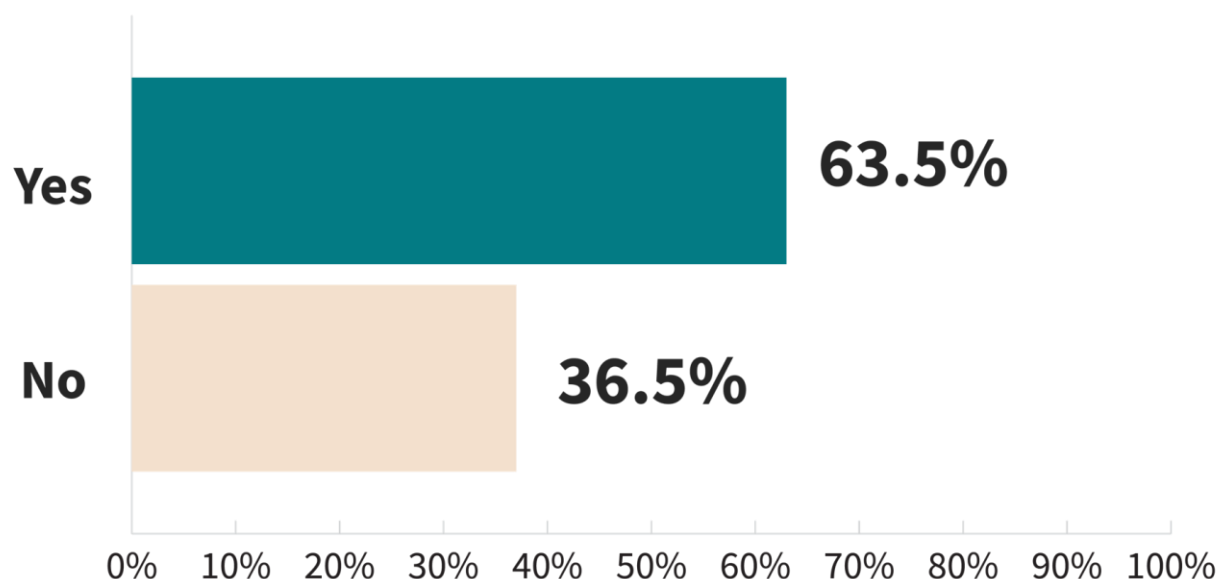


**Has your legal department been able to demonstrate tangible cost savings driven by AI?**



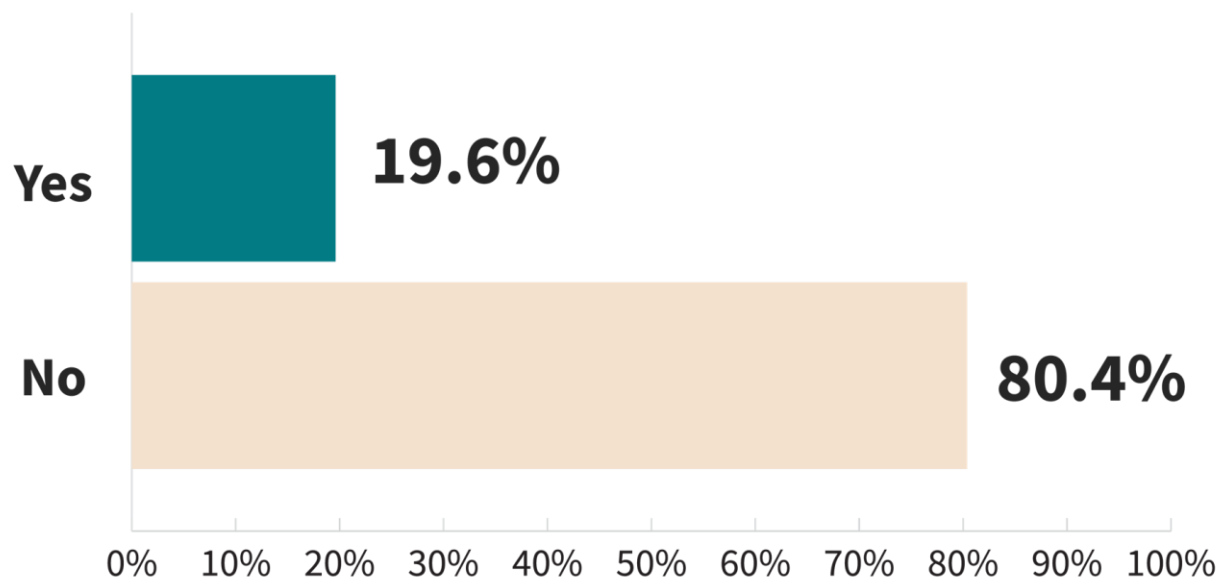


**Has your legal department been able to demonstrate tangible benefits (other than cost savings) driven by AI?**

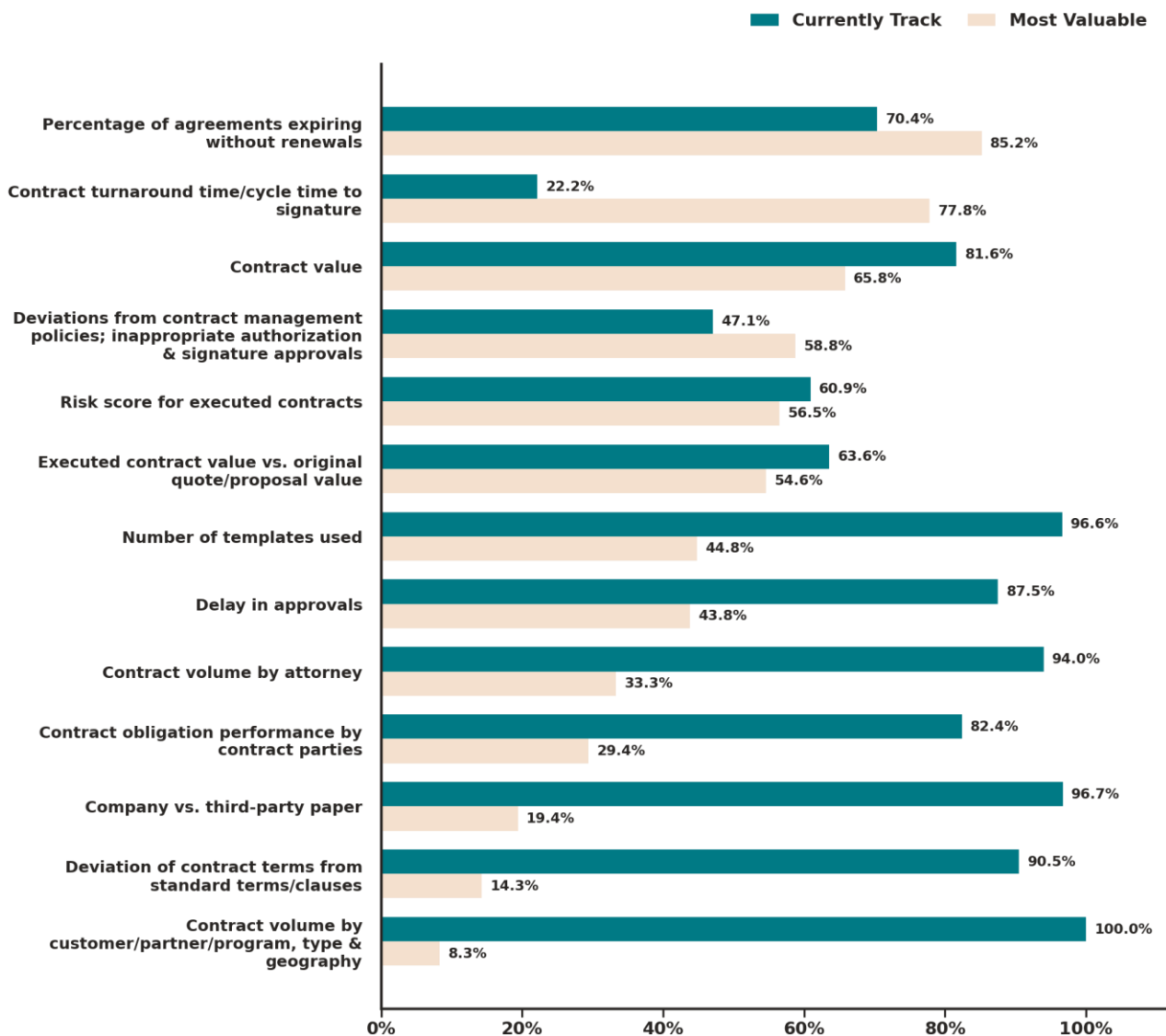


Q47:

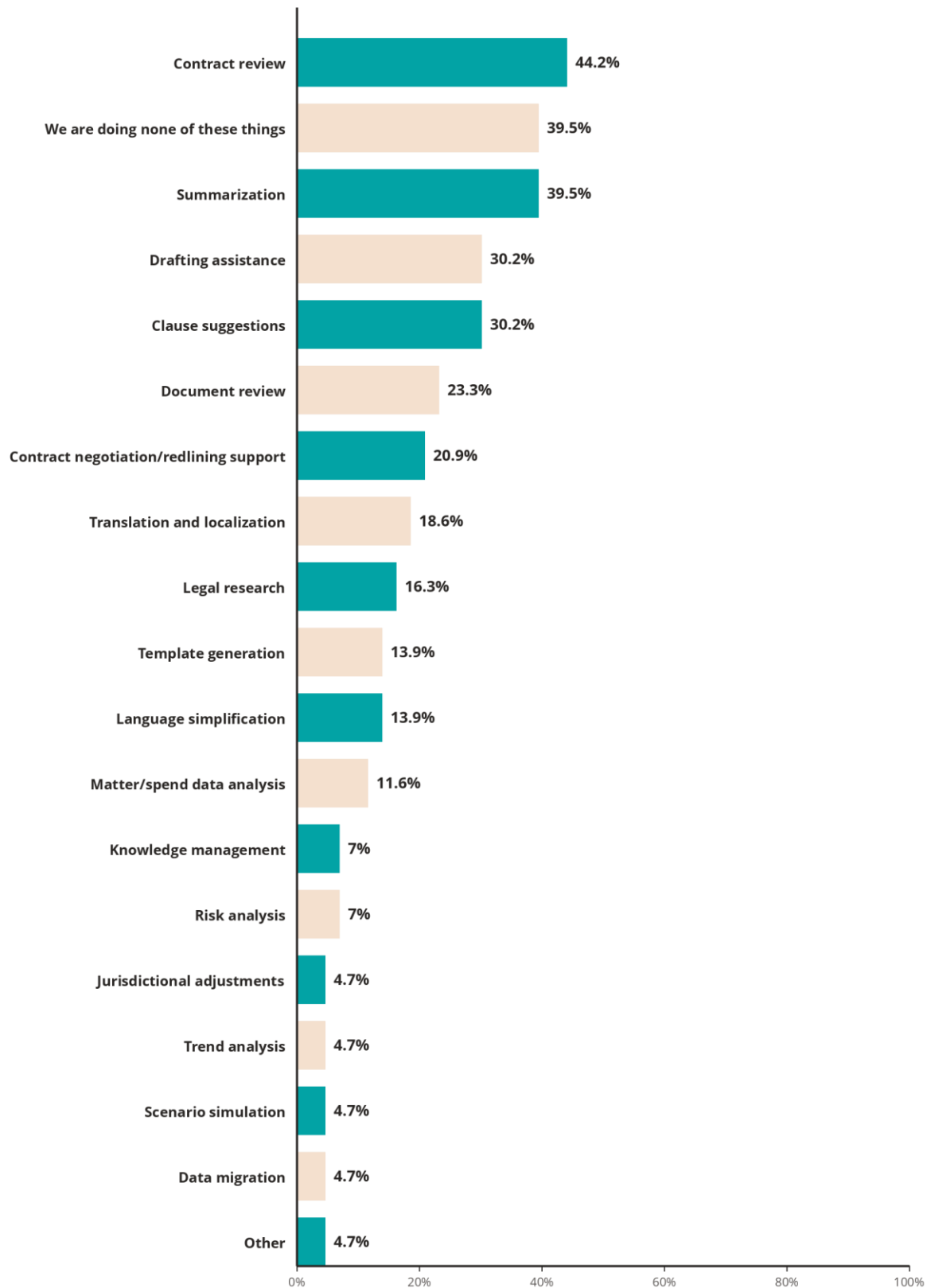
**Have you asked your firms to demonstrate  
cost savings from their use of GenAI?**



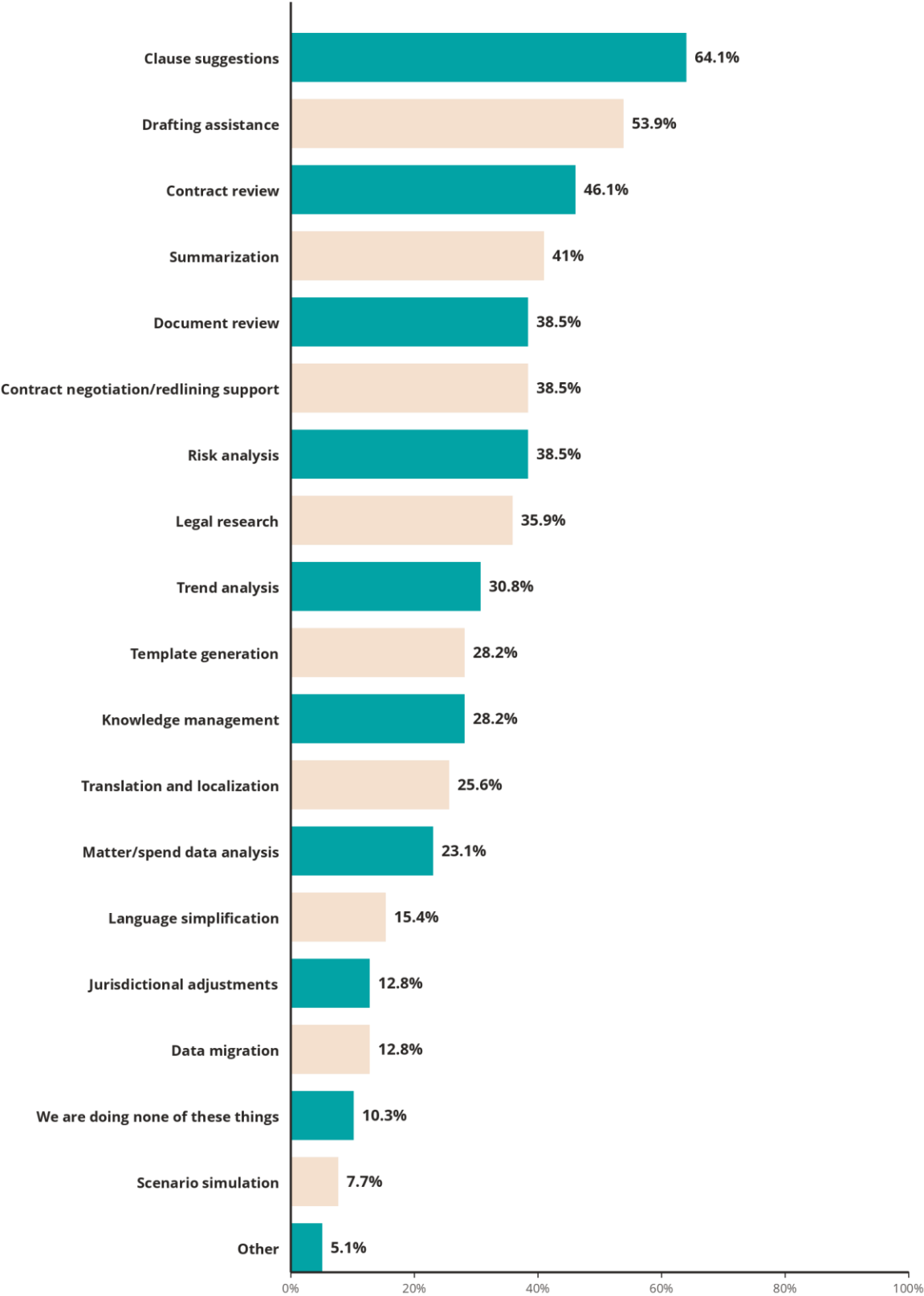
**With regard to your contract lifecycle management (CLM) processes, what data do you currently track and which three are most valuable?**



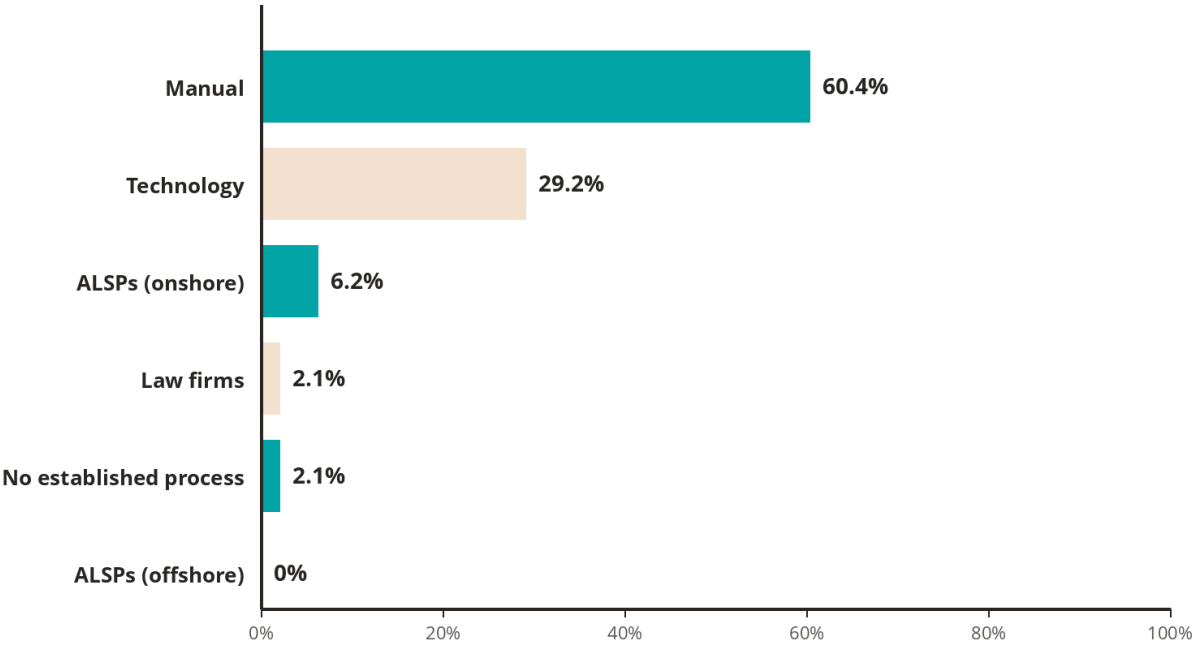
## We are USING GenAI in CLM in the following ways:



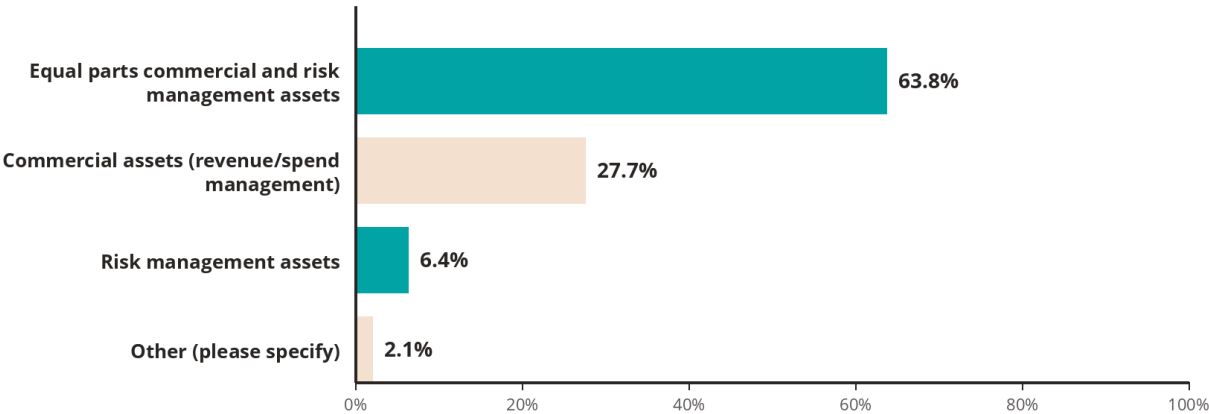
We are CONSIDERING GenAI in CLM in the following ways:



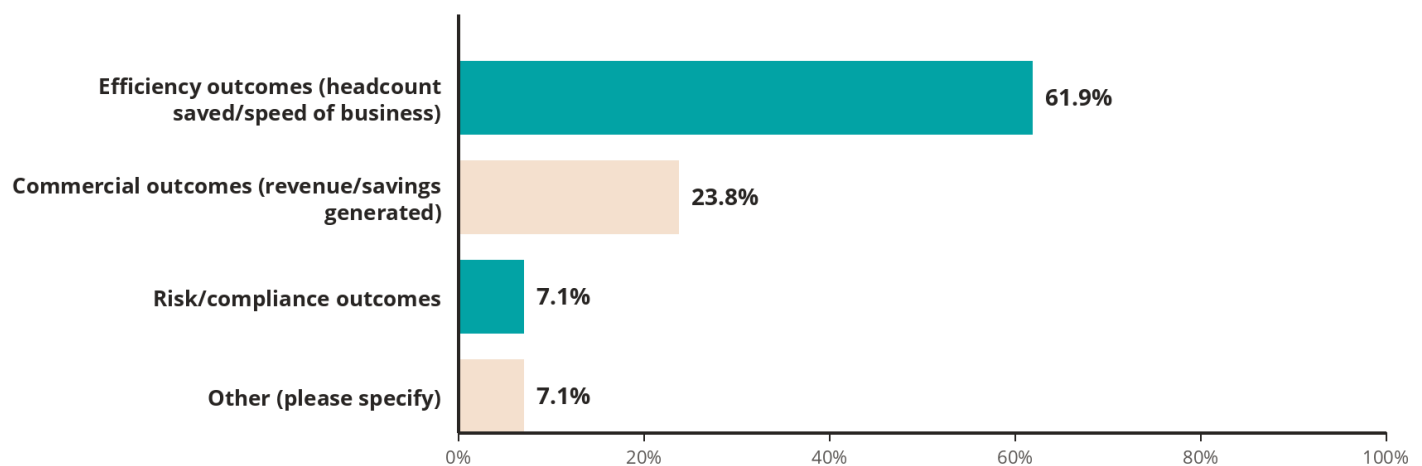
What is your primary method of conducting contract review?



Our legal department primarily approaches contracts as \_\_:

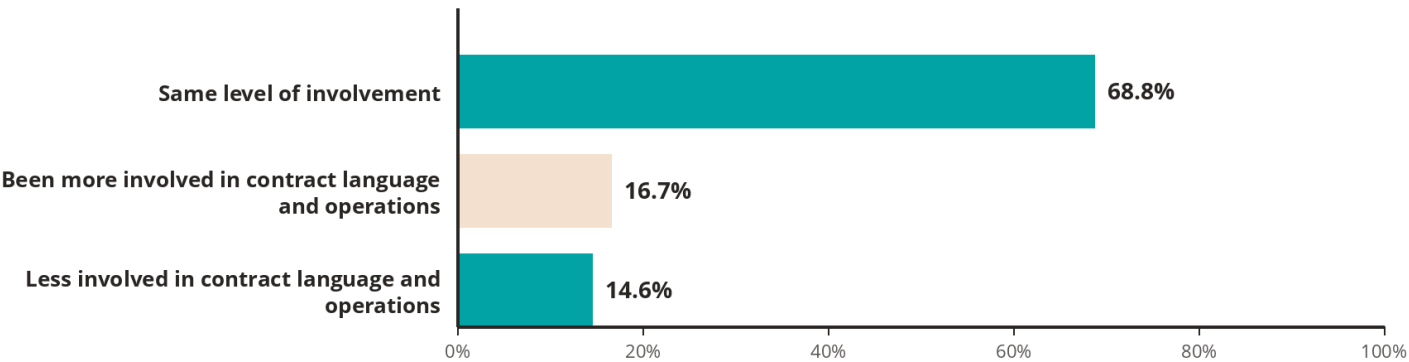


We measure success in our CLM program by \_\_:

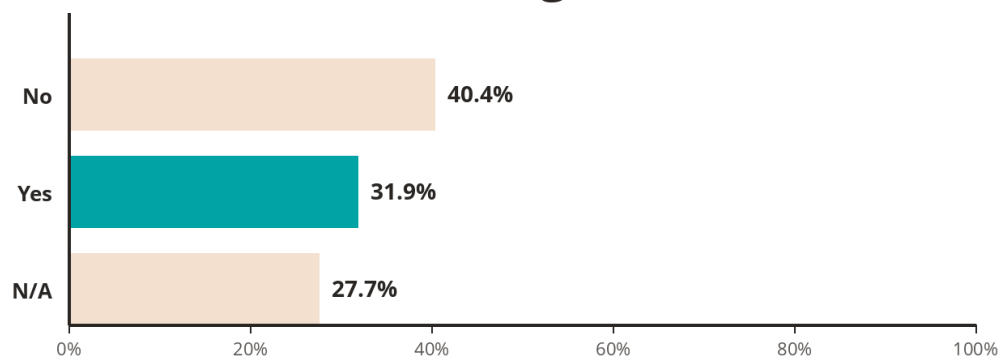




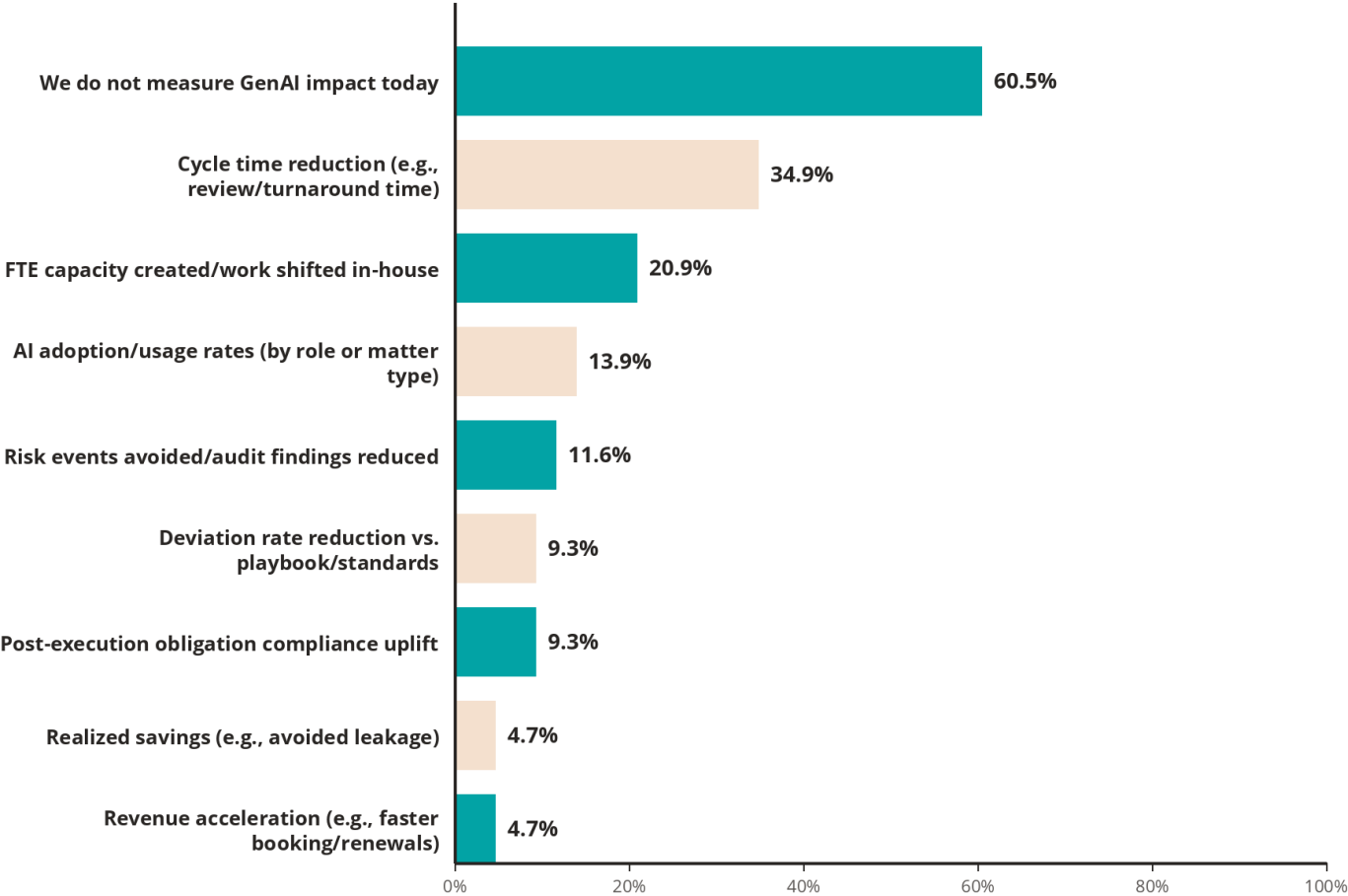
In the last two years, our finance department has \_\_\_\_:



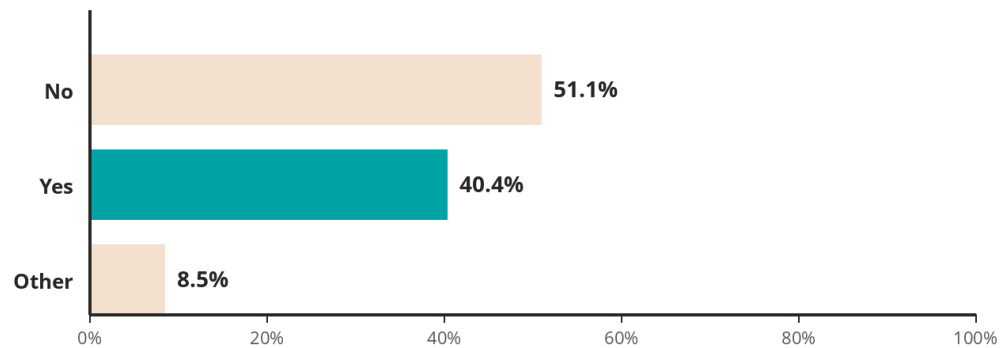
**Is your CLM integrated into other enterprise systems (e.g., CRM, ERP, Sourcing)?**



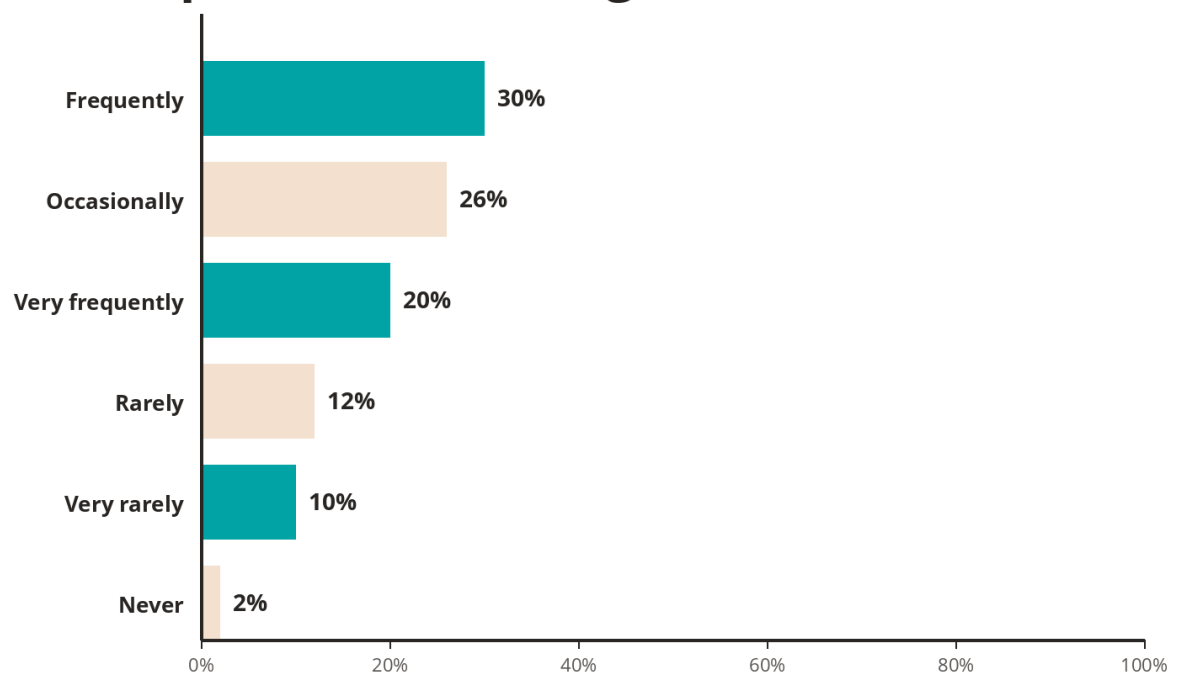
# Which metrics do you use to measure the impact of GenAI on legal/contracting outcomes?



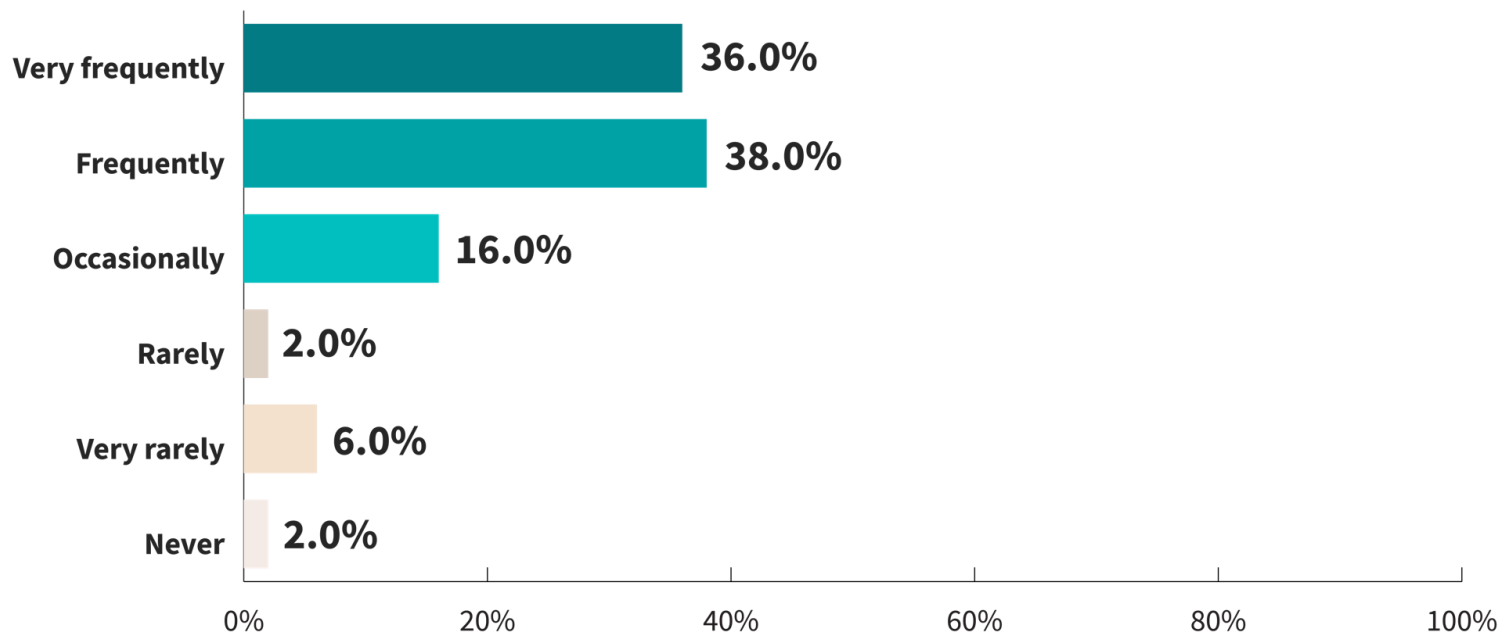
**Do you see custom-built Agentic-based workflows replacing conventional CLM tools?**



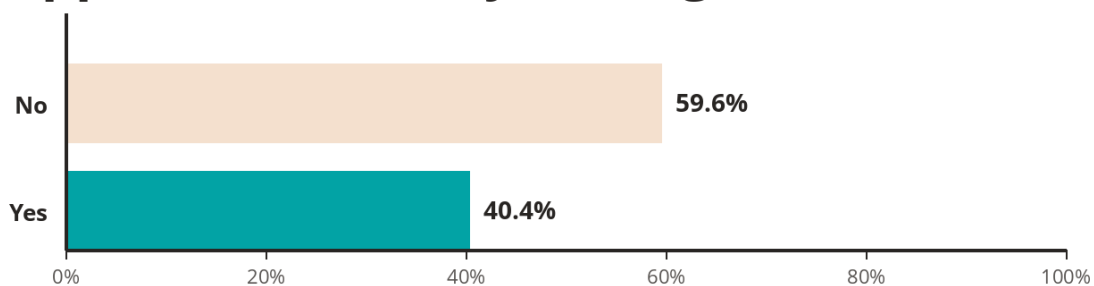
## How often is the legal operations team involved in enterprise-wide strategic initiatives?



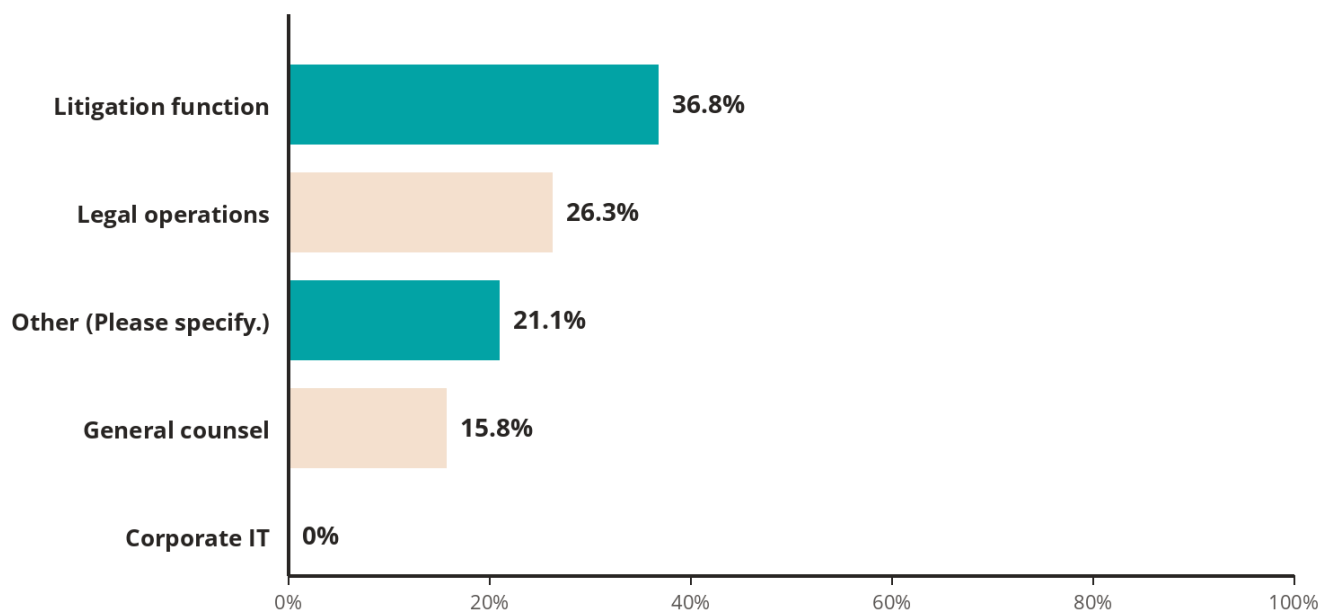
**How often is the legal operations team involved in cross-functional objectives (e.g., a contract management program that involves procurement, sales, and legal)?**



**Does your law department have a litigation support/e-discovery manager?**

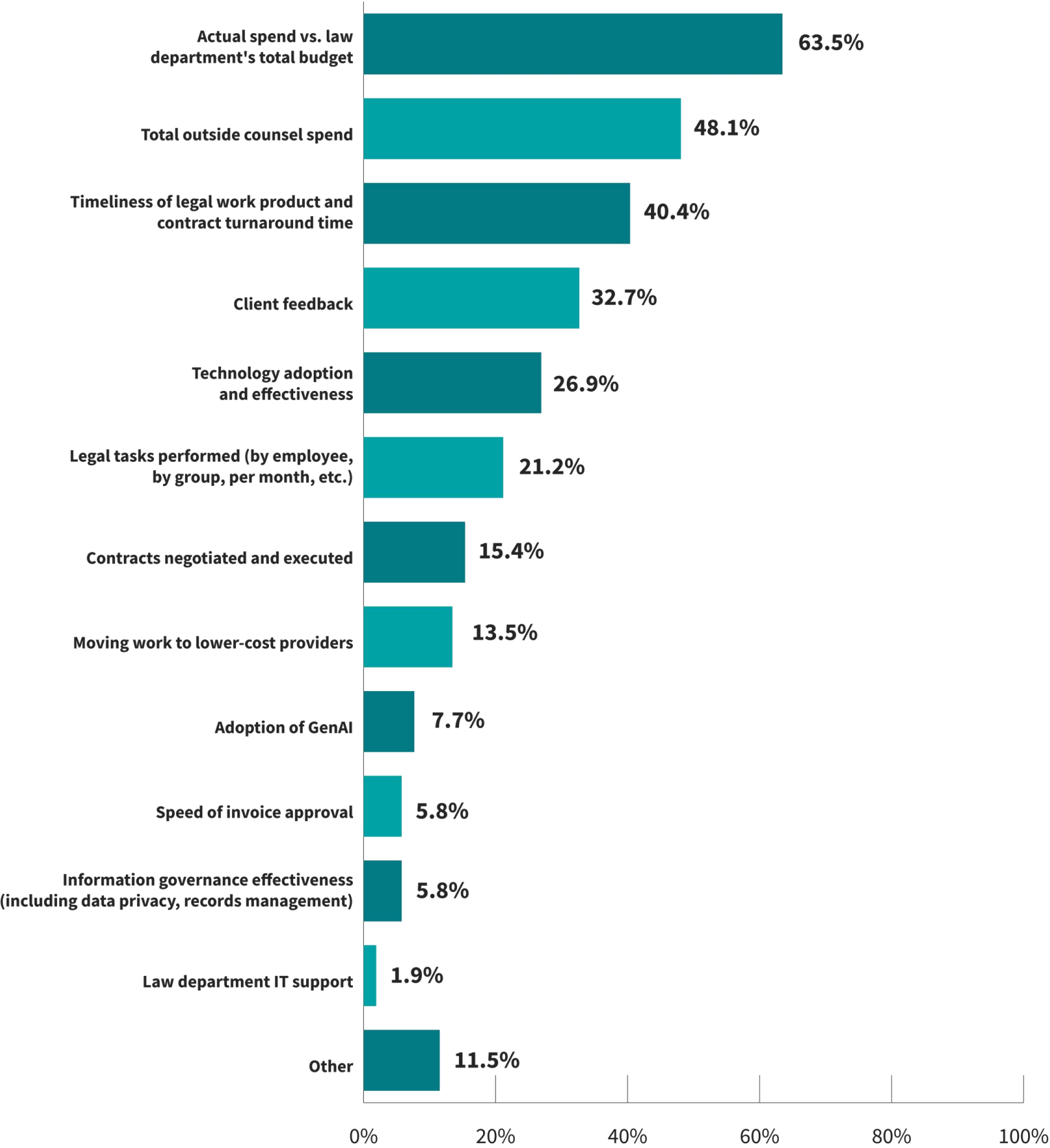


## Who does the e-discovery manager report to?

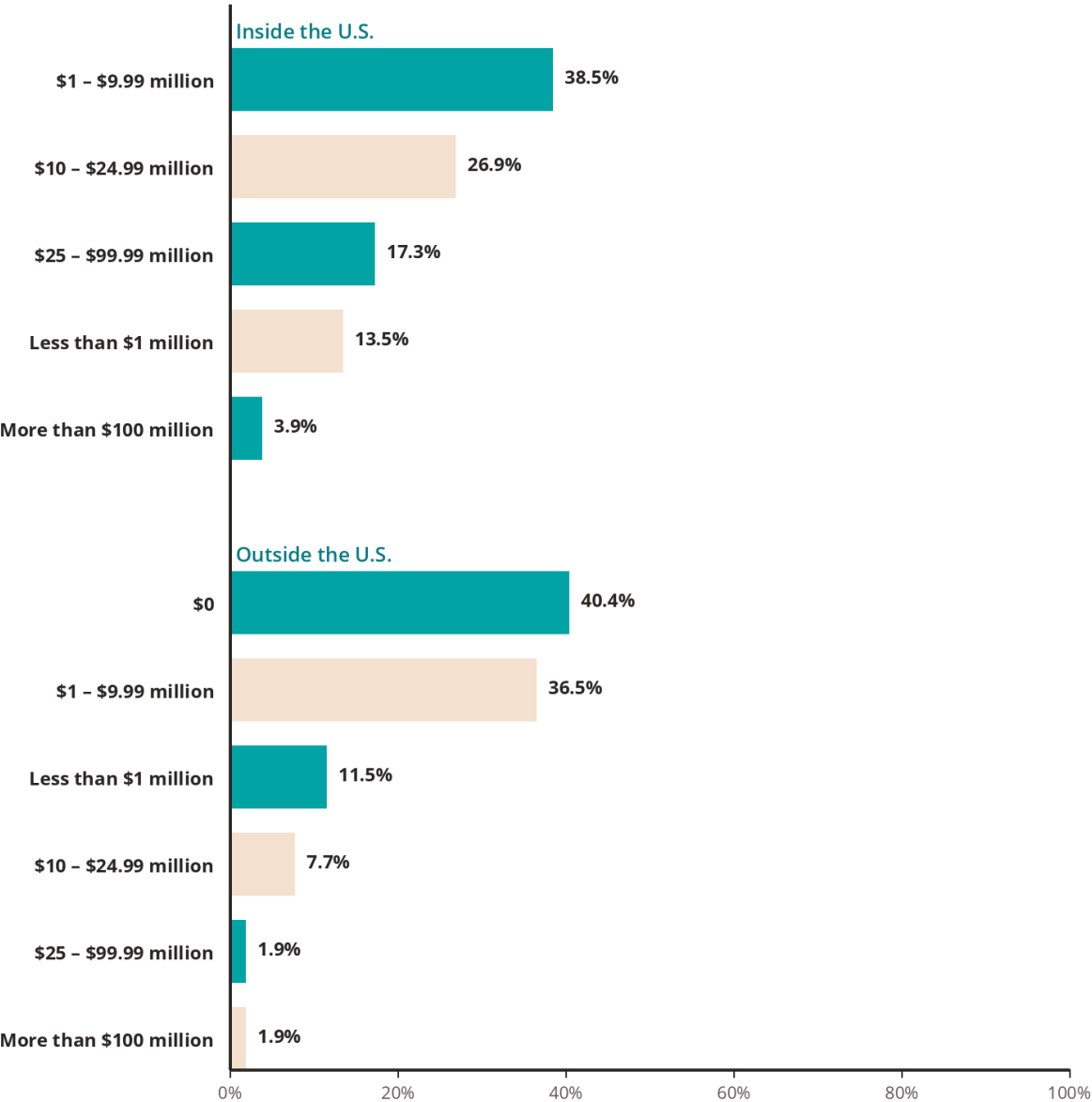




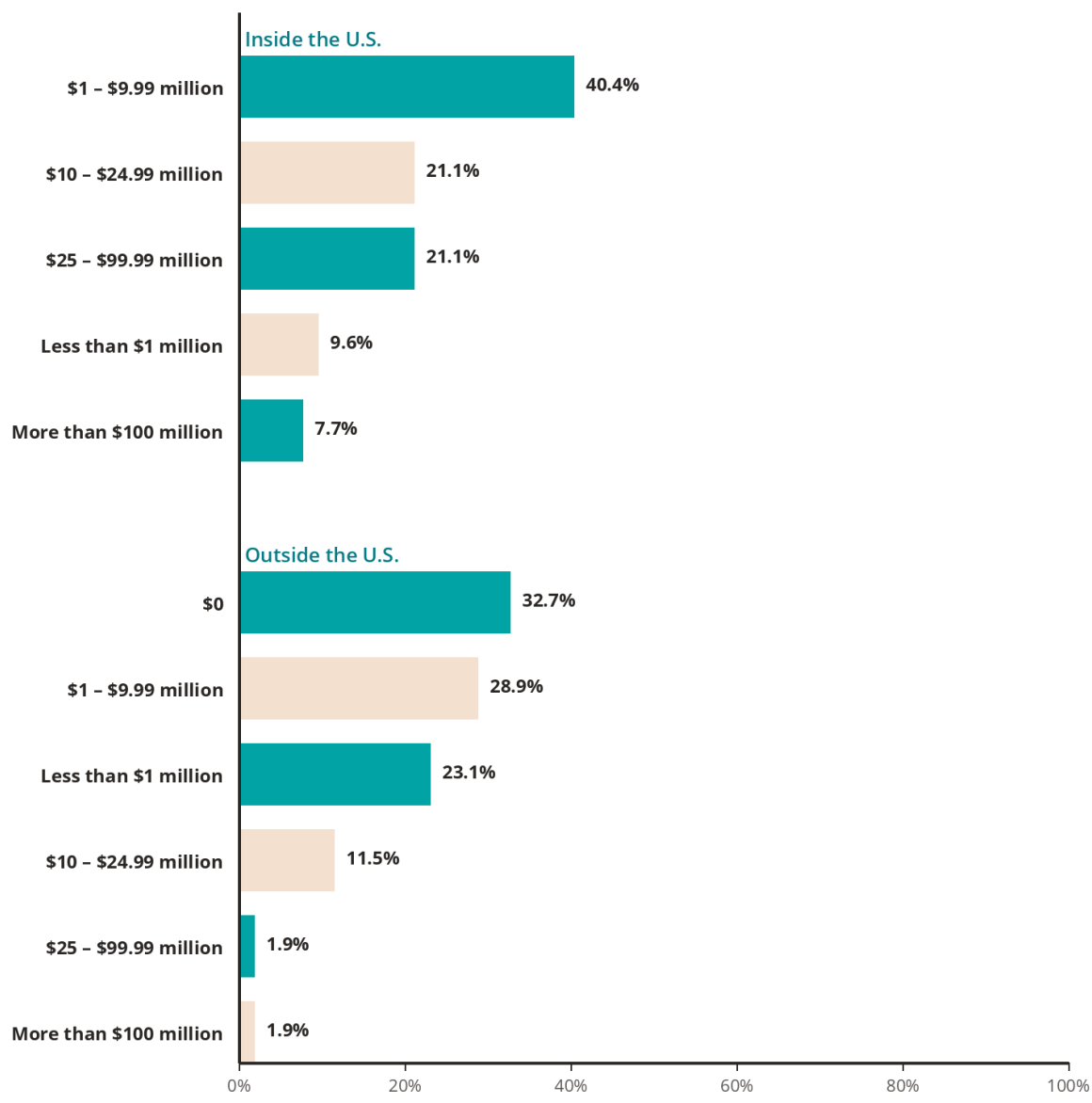
What do you consider to be your TOP THREE key performance indicators?



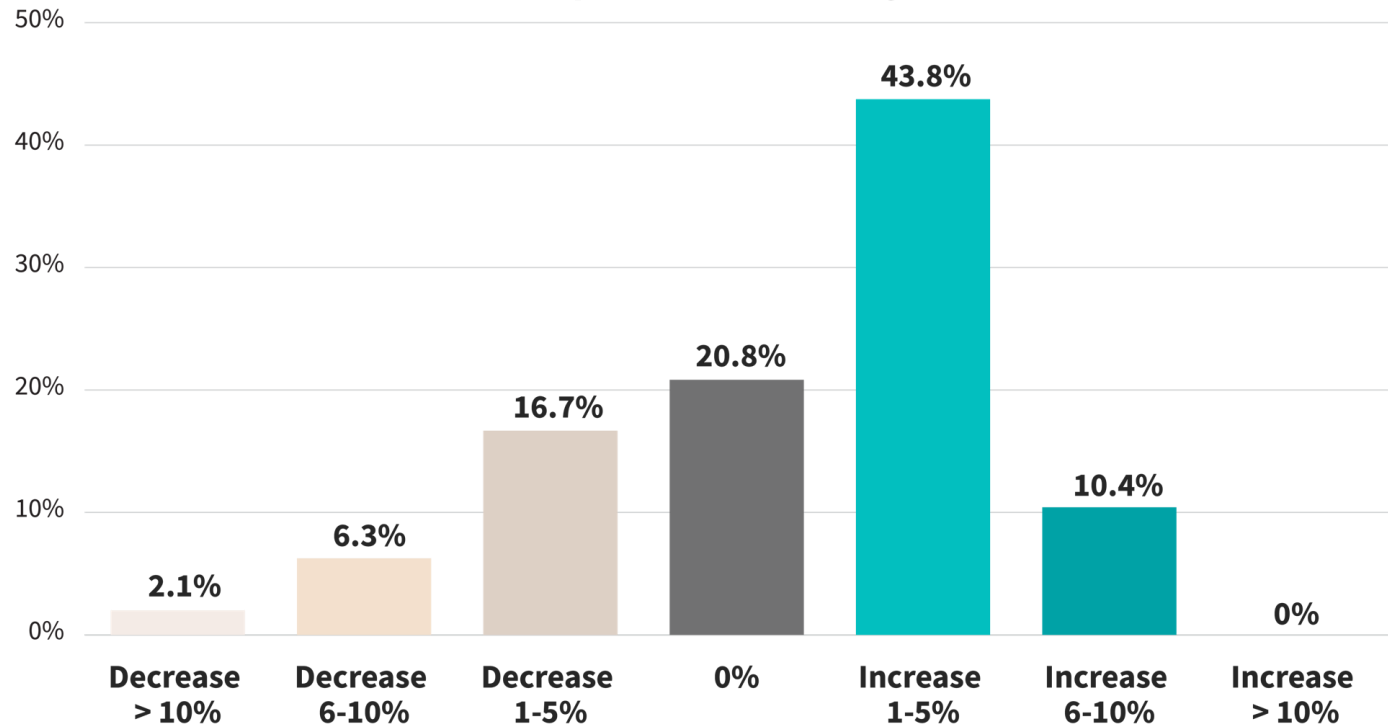
What is your total INTERNAL annual legal spend overall?



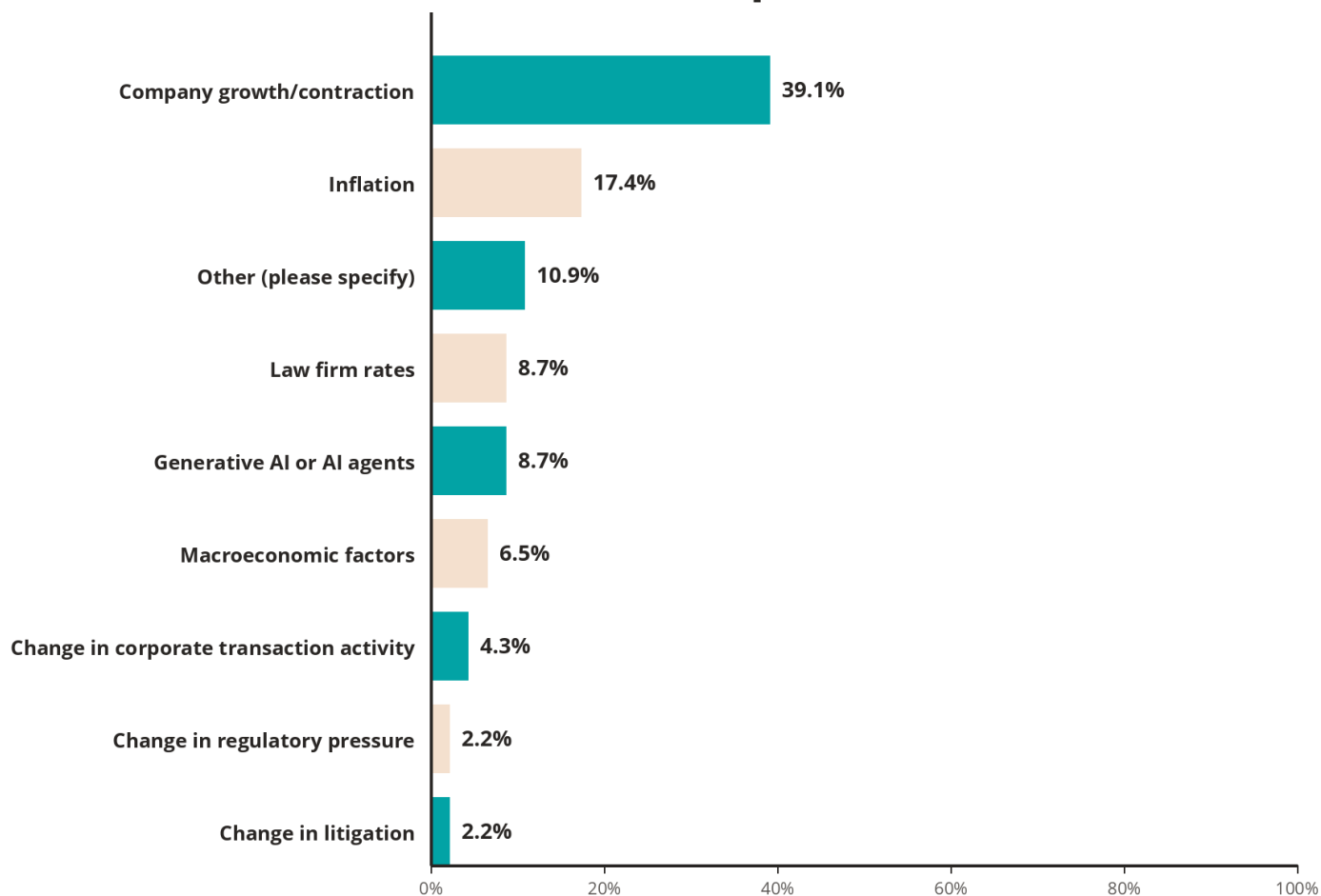
What is your total EXTERNAL annual legal spend overall?



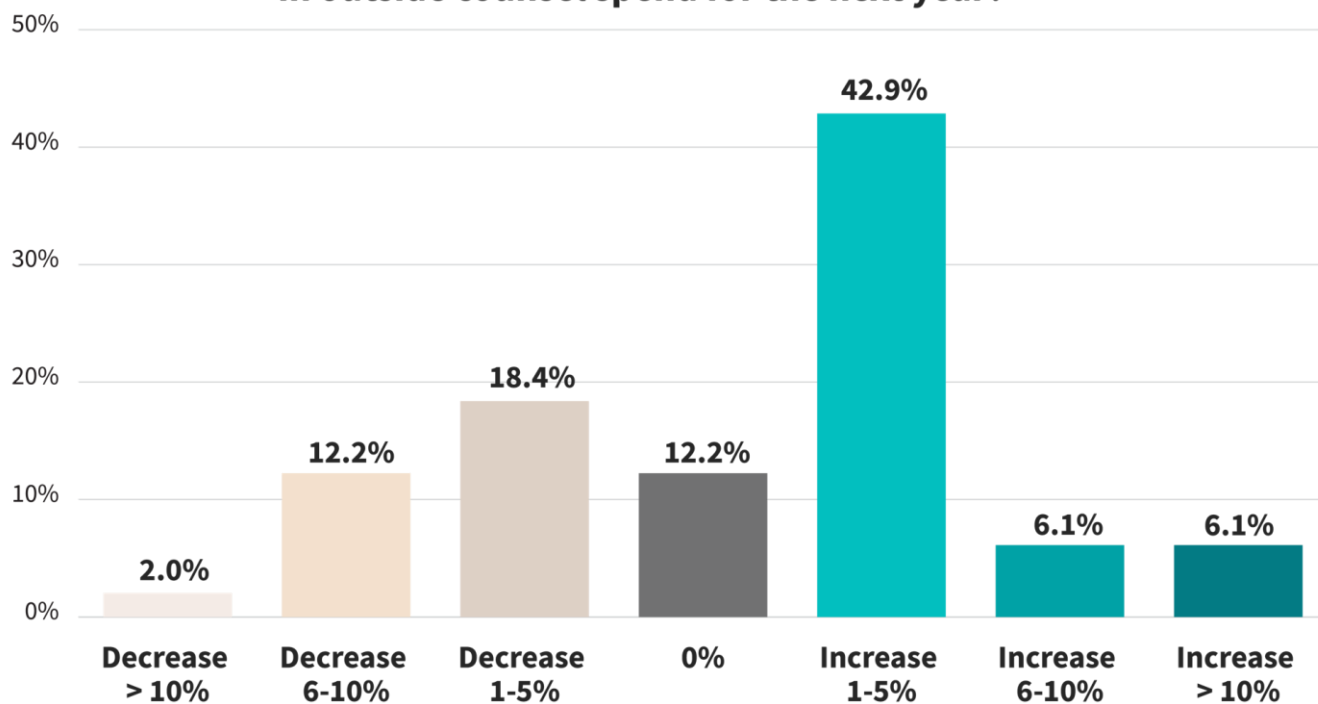
What percentage change do you anticipate in internal spend for the next year?



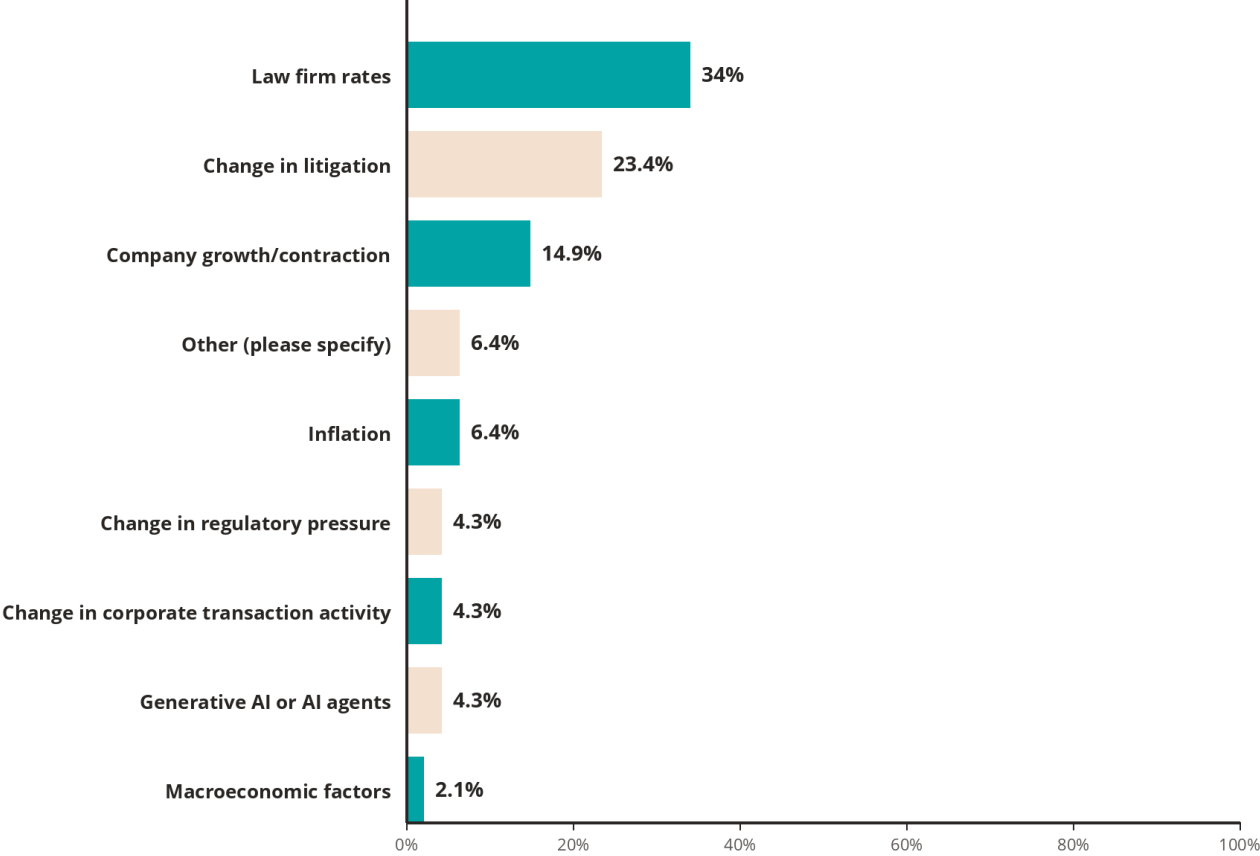
## What is the primary cause for the increase or decrease in internal spend?



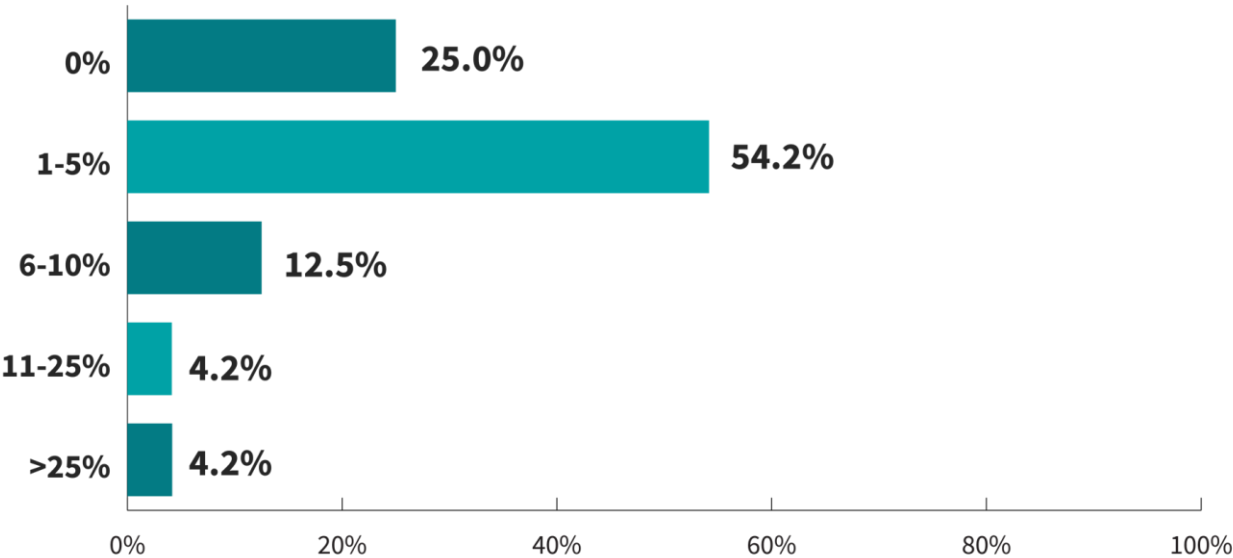
**What percentage change do you anticipate  
in outside counsel spend for the next year?**



What is the primary cause for the increase or decrease in outside counsel spend?

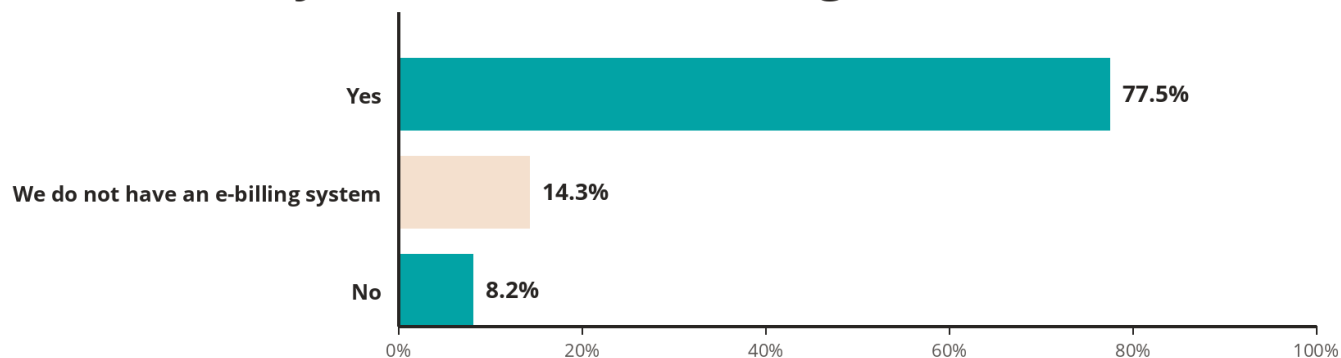


What percentage of your outside counsel spend is with their alternative legal service delivery models, such as captive ALSP, servicecenters, subscription/self-service, etc., operations.

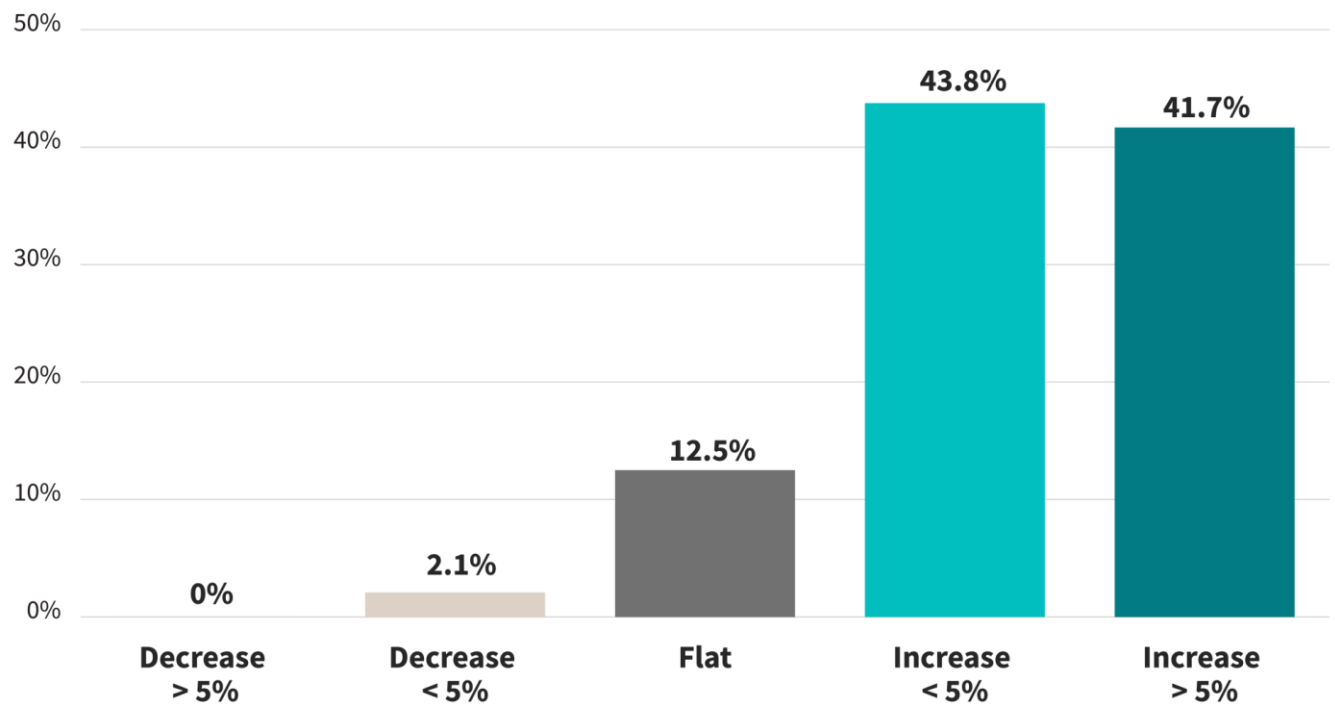




**Do you use your e-billing system to enforce compliance with your outside counsel guidelines?**

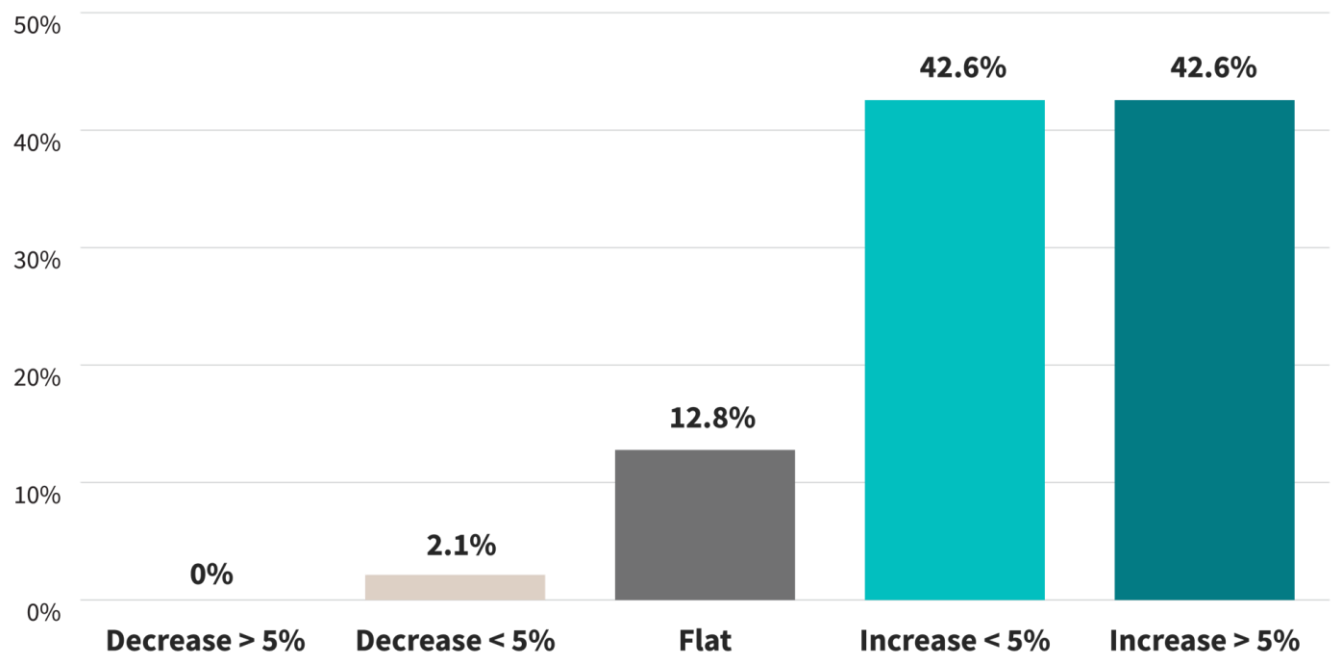


**How have your overall law firm rates changed over the past 12 months?**  
**(Please respond in terms of actual, approved rate changes, not law firm requests.)**

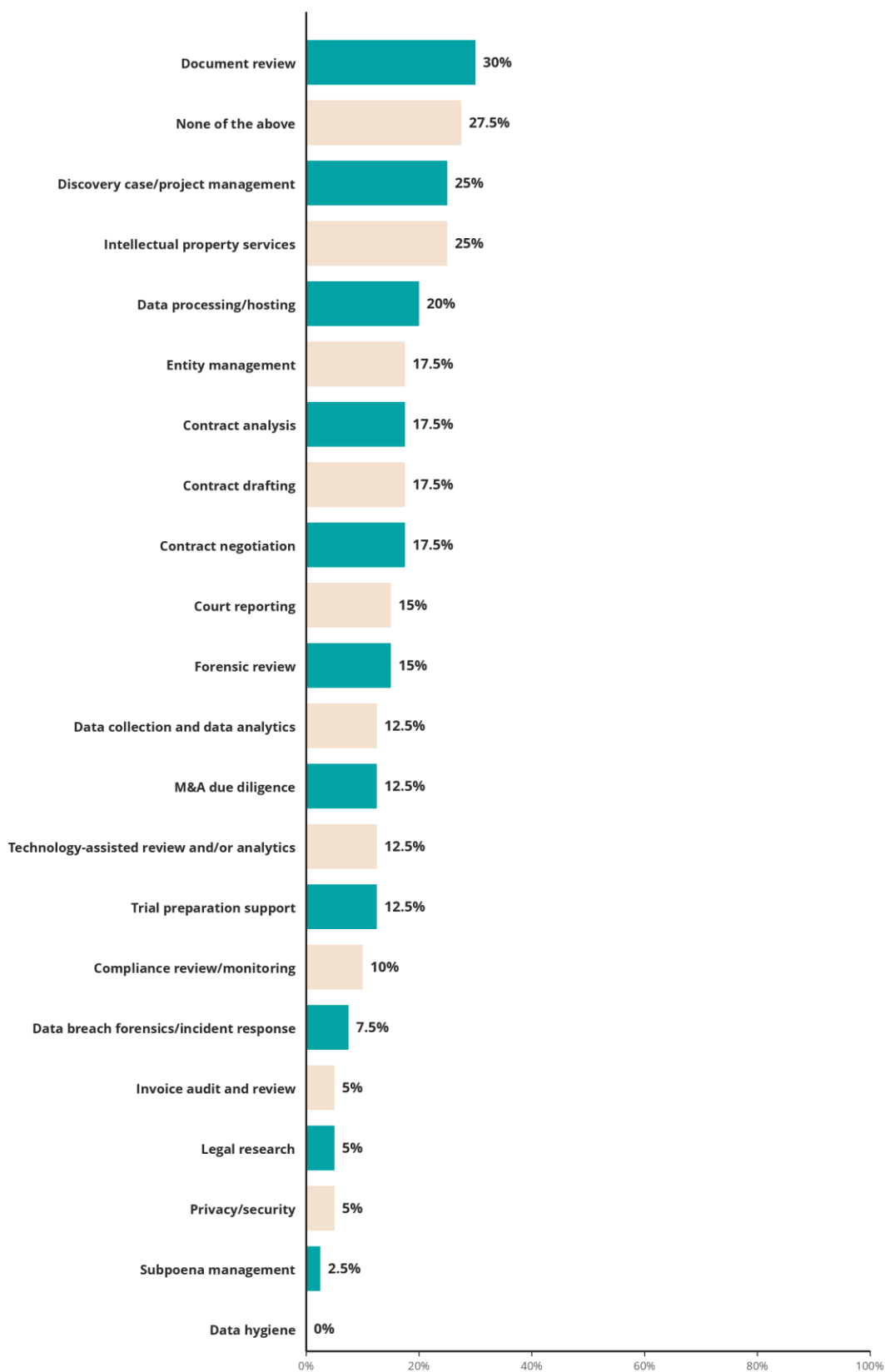


## Q74:

How do you expect your overall law firm rates to change over the next 12 months?  
(Please respond in terms of actual, approved rate changes, not law firm requests.)

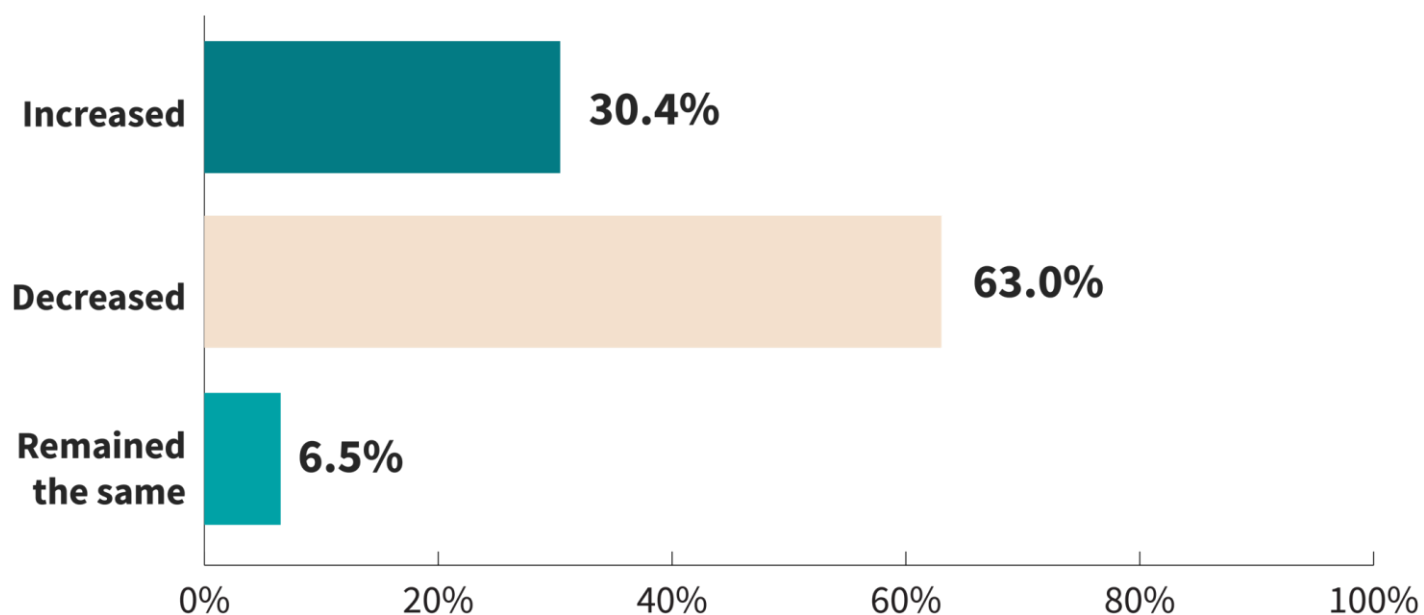


## We use alternative staffing/independent ALSPs for:



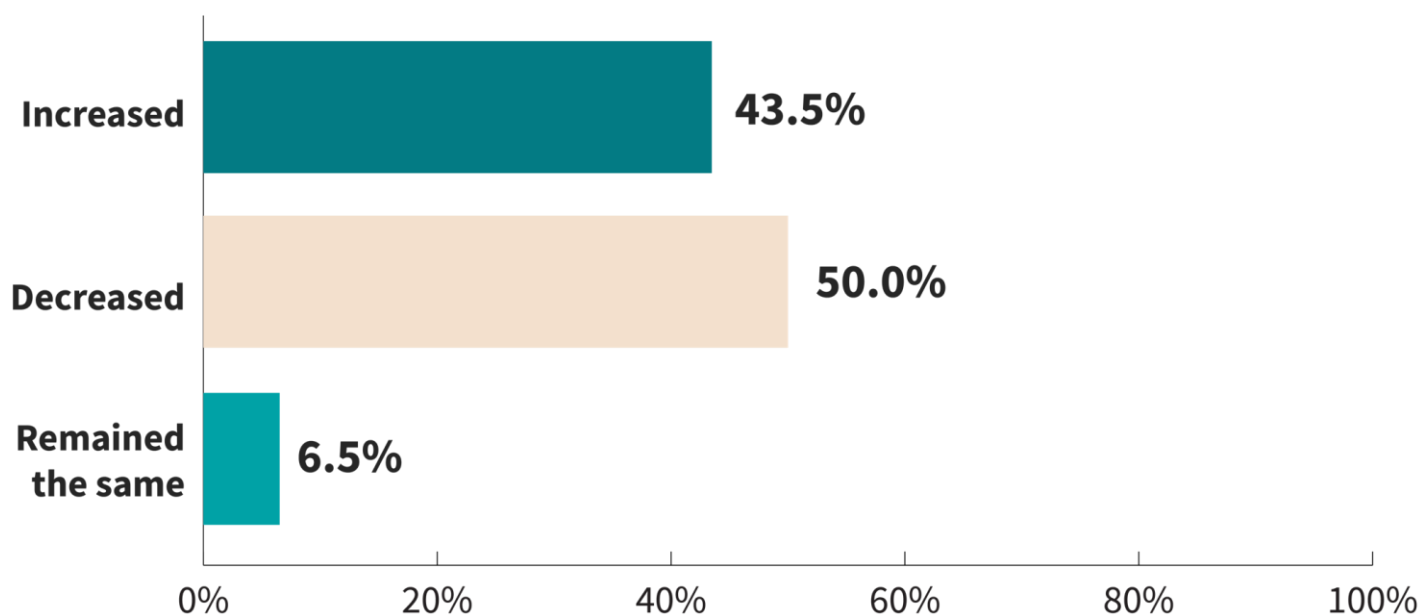
**Q76:**

**Our spend on alternative legal service providers, including offshore LPOs and consultancies, has \_\_\_\_\_ over the past 12 months.**



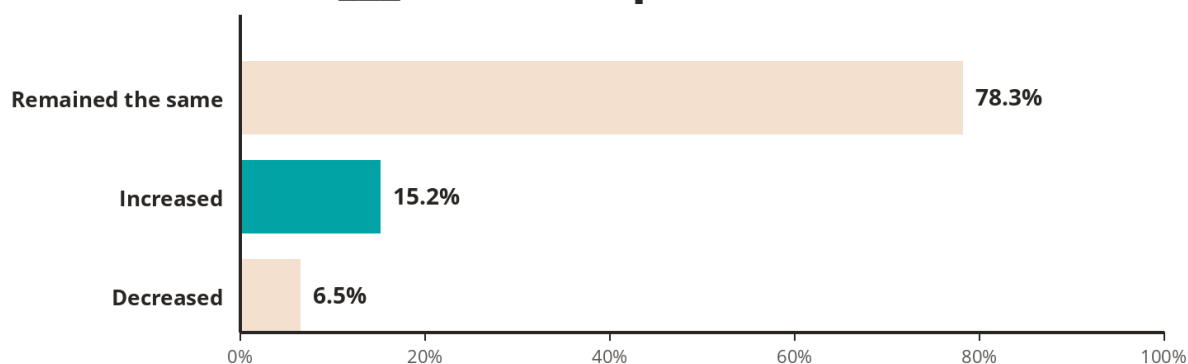
**Q78:**

**We expect our spend on alternative legal service providers, including offshore LPOs and consultancies, to \_\_\_\_\_ over the next 12 months.**

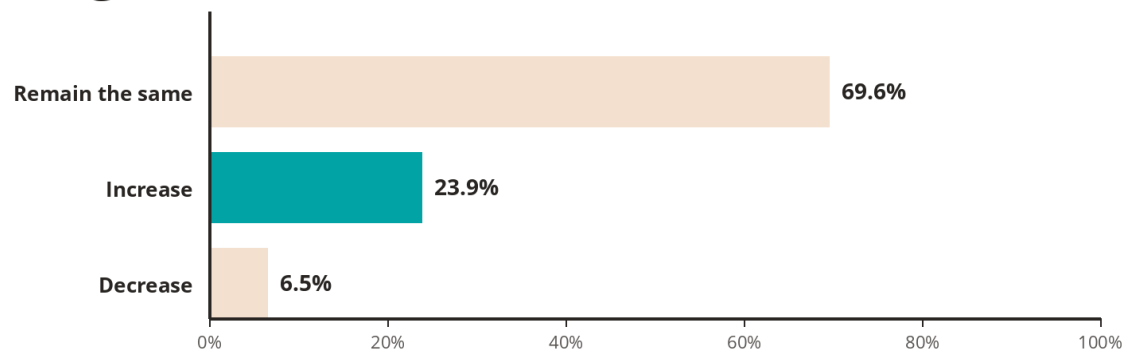


**Q79:**

**Instances of our outside counsel proactively partnering with ALSPs have \_\_ over the past 12 months.**

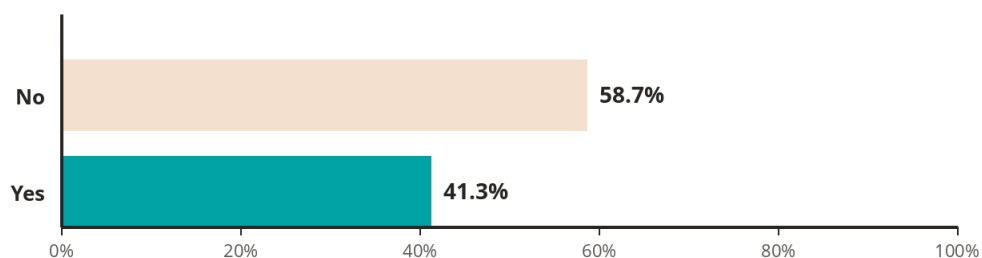


**We expect instances of our outside counsel proactively partnering with ALSPs to \_\_\_ over the next 12 months.**

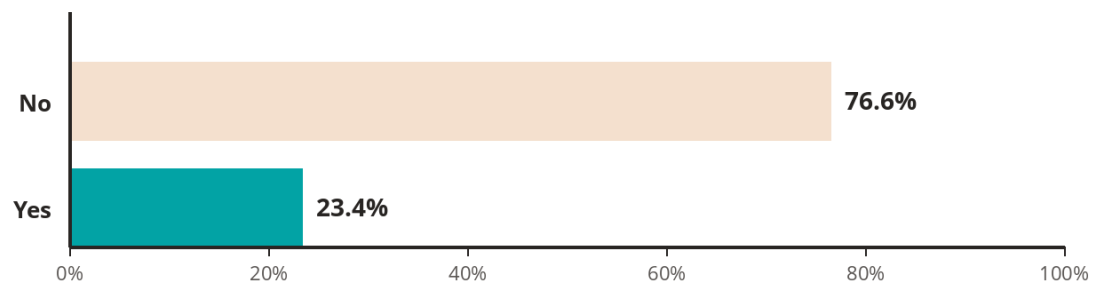




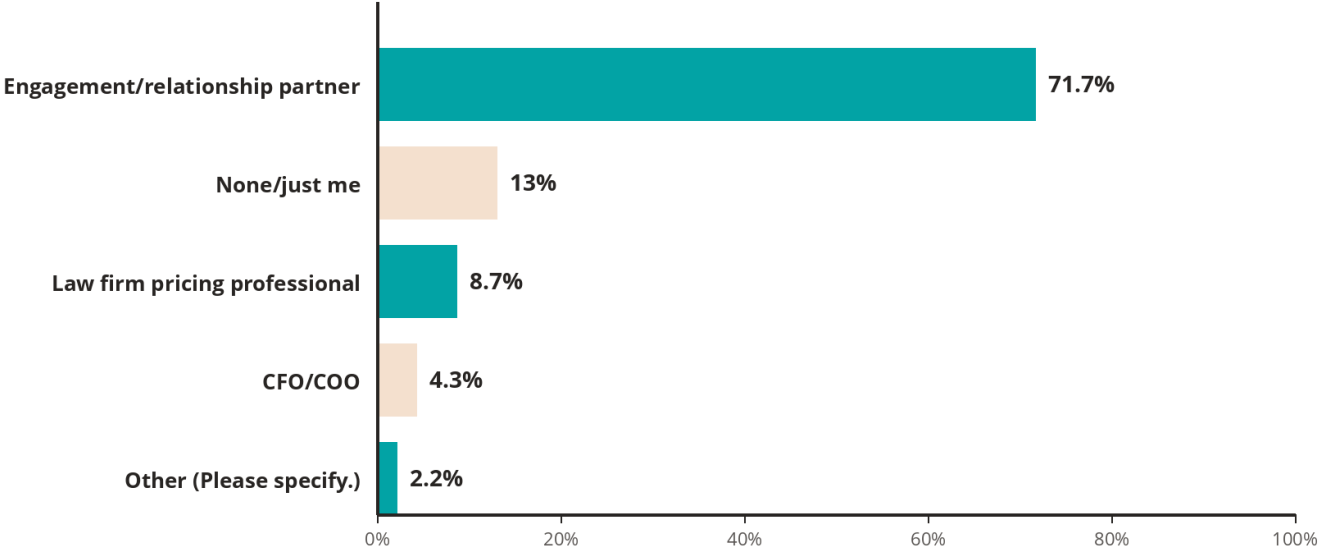
**We actively encourage our outside counsel to partner with ALSPs.**



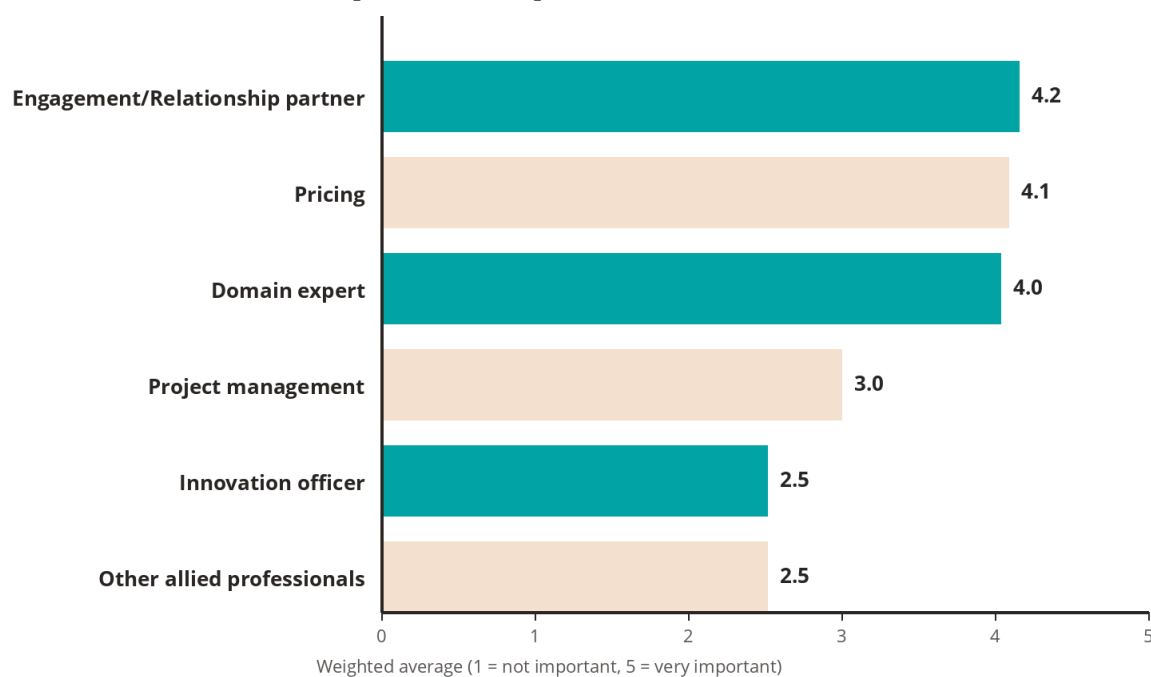
## Do you use offshore ALSPs?



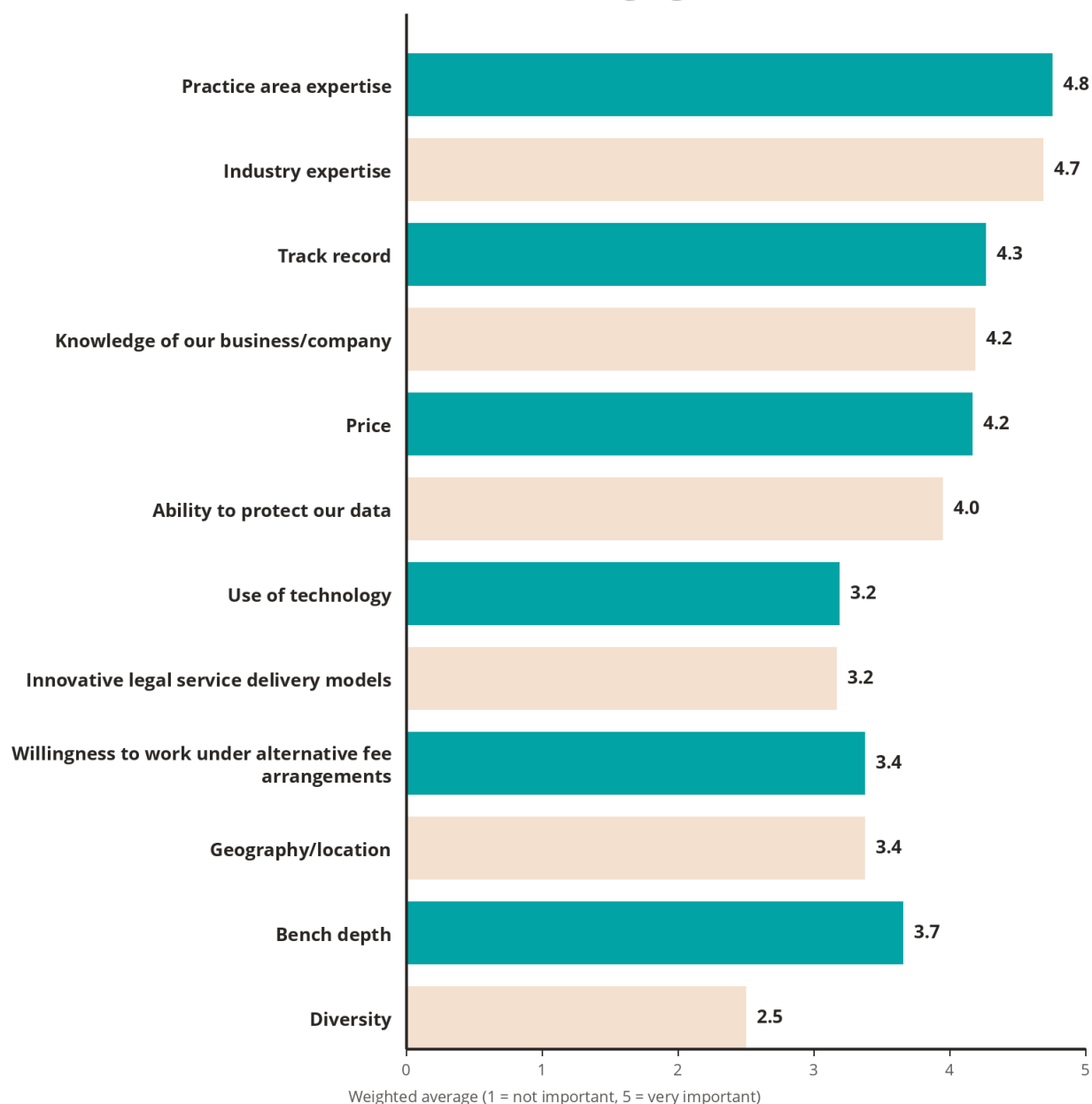
Which position do you primarily engage with when setting prices/rates and other commercial terms?



**Please rank the following in terms of their importance at law firm pitches/presentations.**



**Please rank the following in terms of selecting outside counsel for an engagement.**

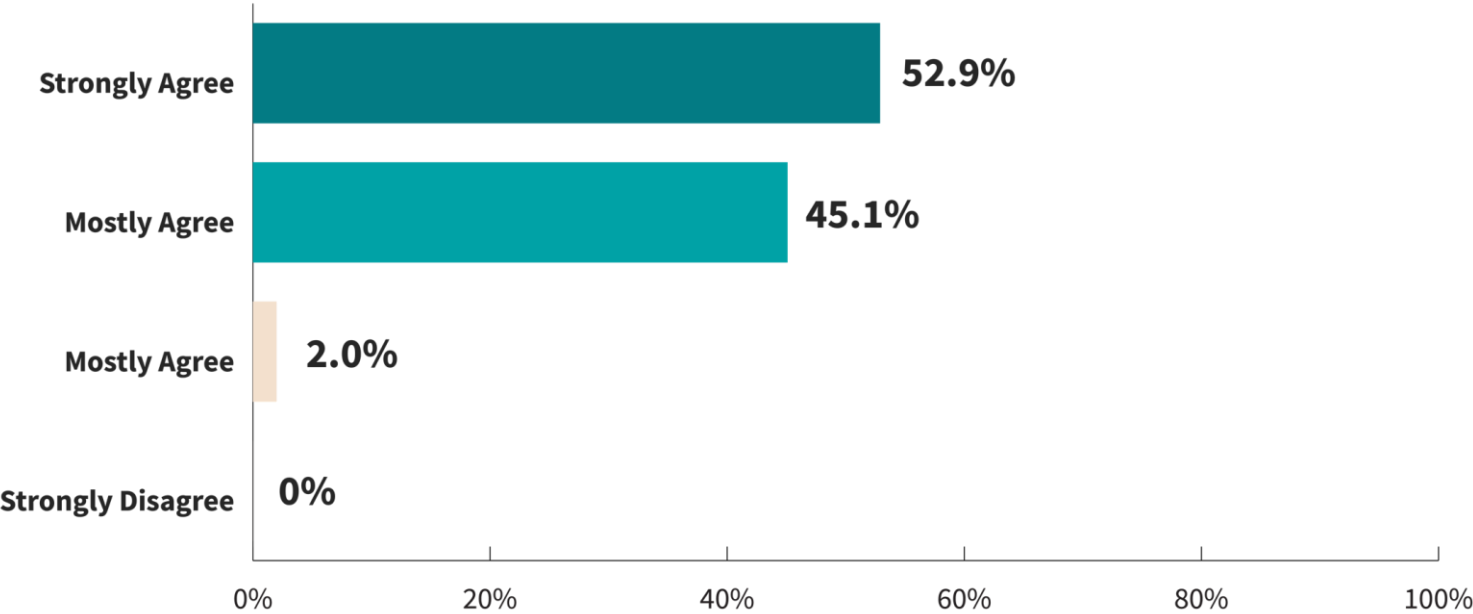


Please rank the following in terms of selecting ALSPs for an engagement (1 being not important and 5 being very important):

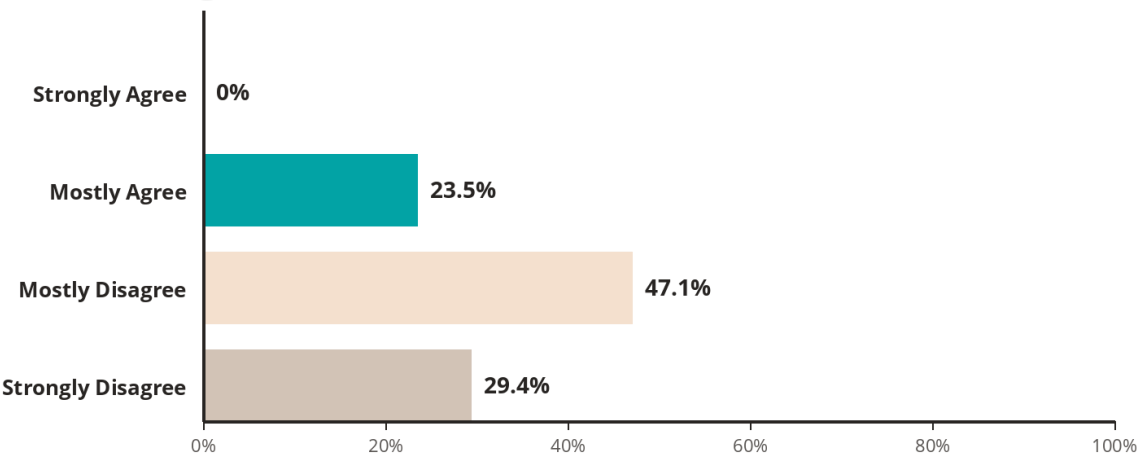
|                                                        | Weighted Average |
|--------------------------------------------------------|------------------|
| Price                                                  | 4.5              |
| Practice area expertise                                | 4.3              |
| Industry expertise                                     | 4.0              |
| Information security                                   | 4.0              |
| Track record                                           | 3.9              |
| Willingness to work under alternative fee arrangements | 3.9              |
| Use of technology                                      | 3.7              |
| Innovative legal service delivery models               | 3.7              |
| Bench depth                                            | 3.5              |
| Knowledge of our business/company                      | 3.5              |
| Geography/Location                                     | 3.1              |
| Diversity                                              | 2.6              |

Q87-1:

We prefer to do more work in-house,  
but don't always have the bandwidth or headcount.

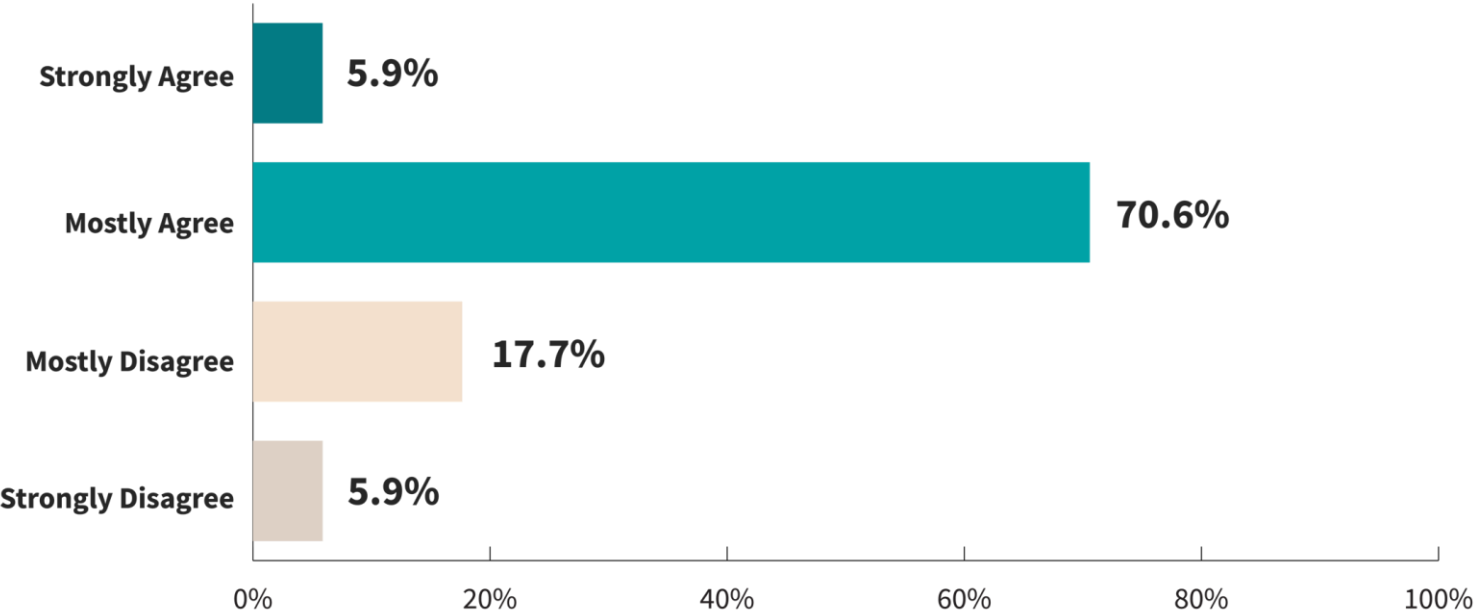


**Our law firms do a good job at suggesting alternative fee arrangements that meet our needs.**

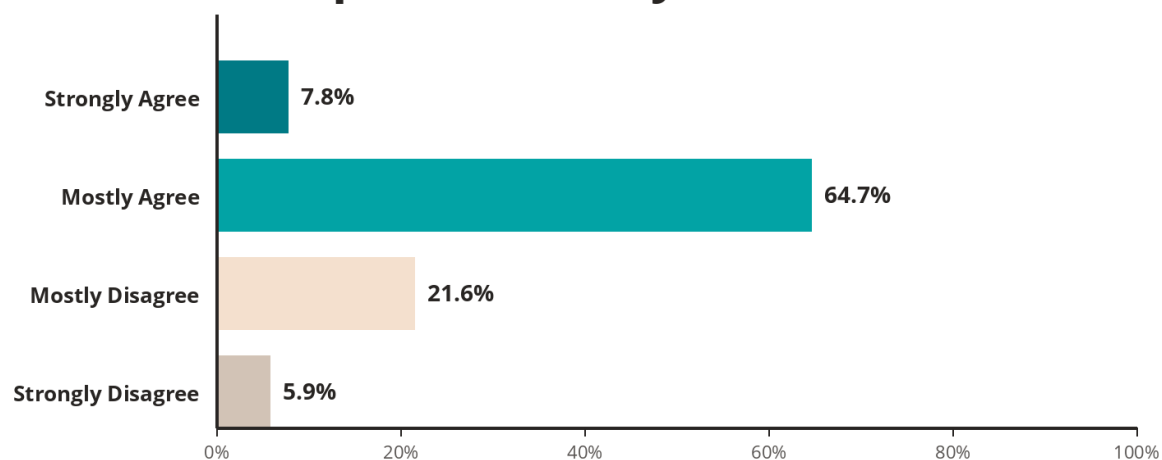




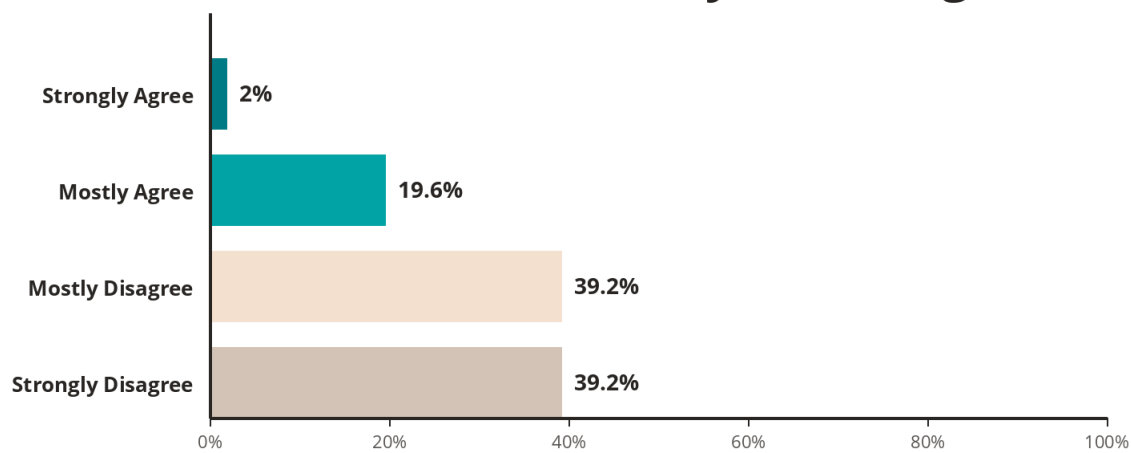
I have access to the right technology to do my job.



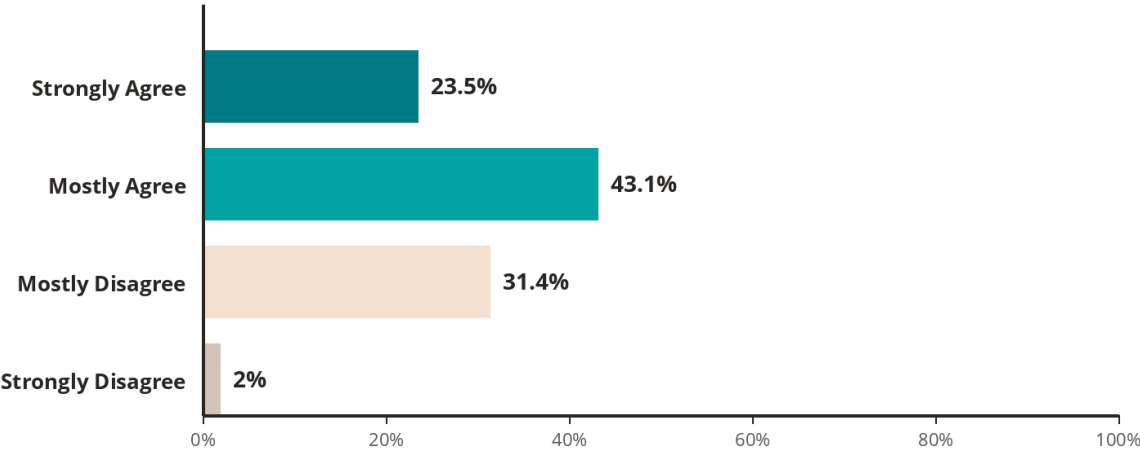
**Our lawyers have the right tech to do their job in their preferred way.**



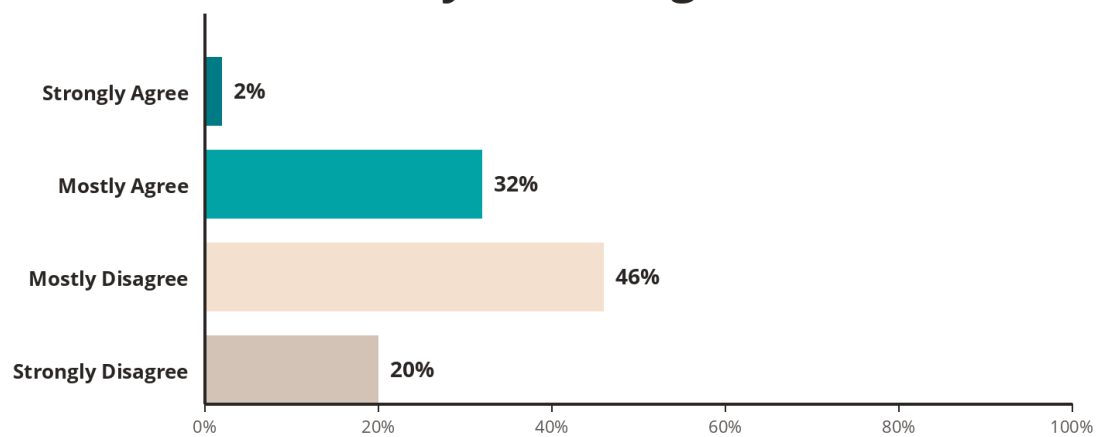
**Generally speaking, law firms and service providers ask me for feedback about how well they are doing.**



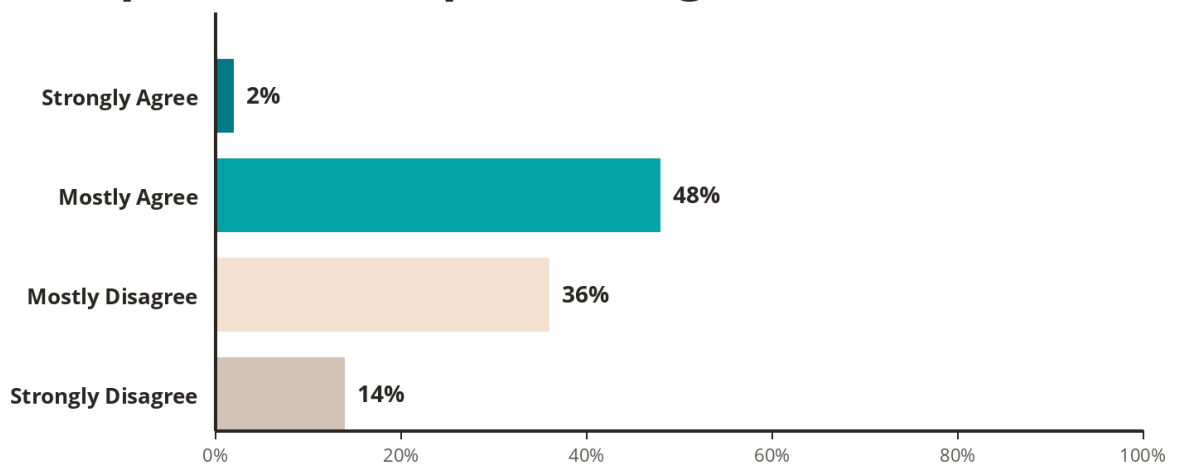
We regularly seek feedback from our internal clients.



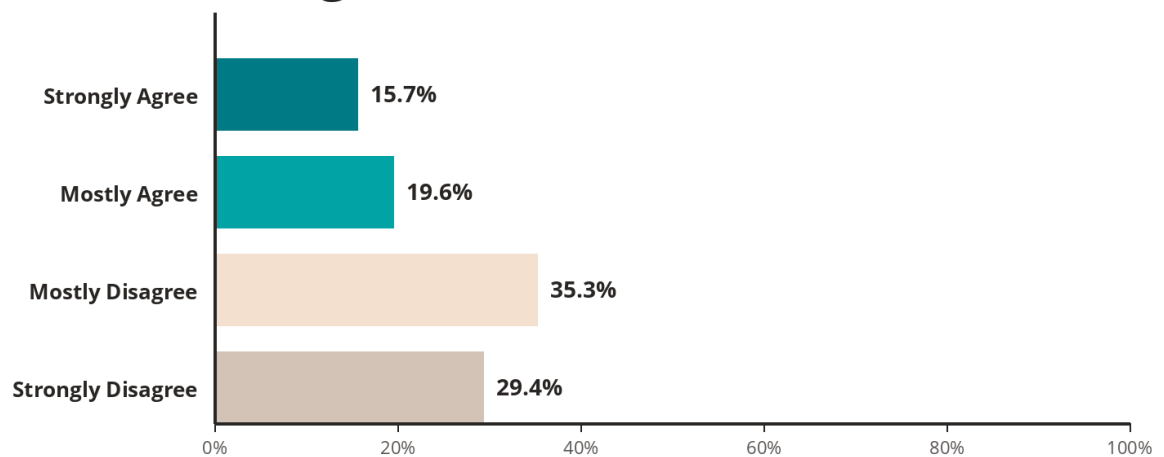
**We proactively provide our law firms with feedback about how well they are doing.**



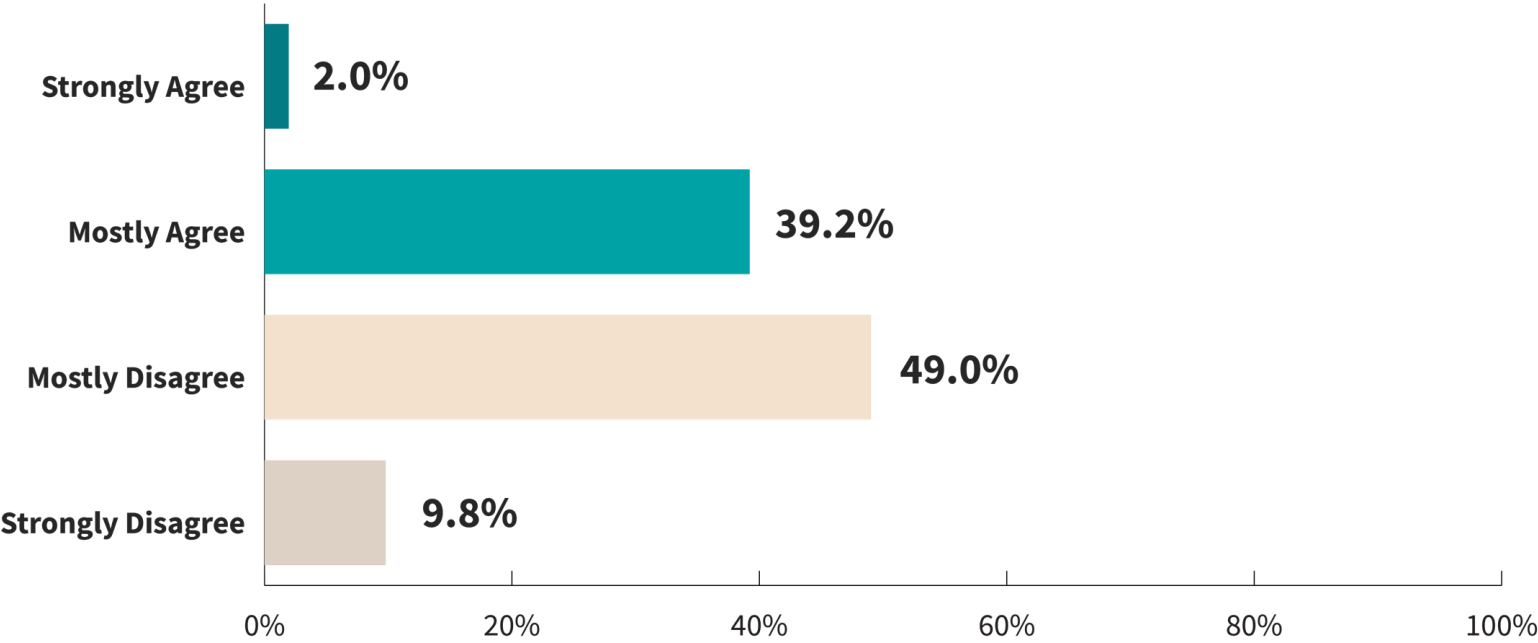
**My law firms help us see around corners by suggesting proactive steps to mitigate risk.**



**We have terminated a law firm, or ALSP, because they failed to follow our guidelines or instructions.**

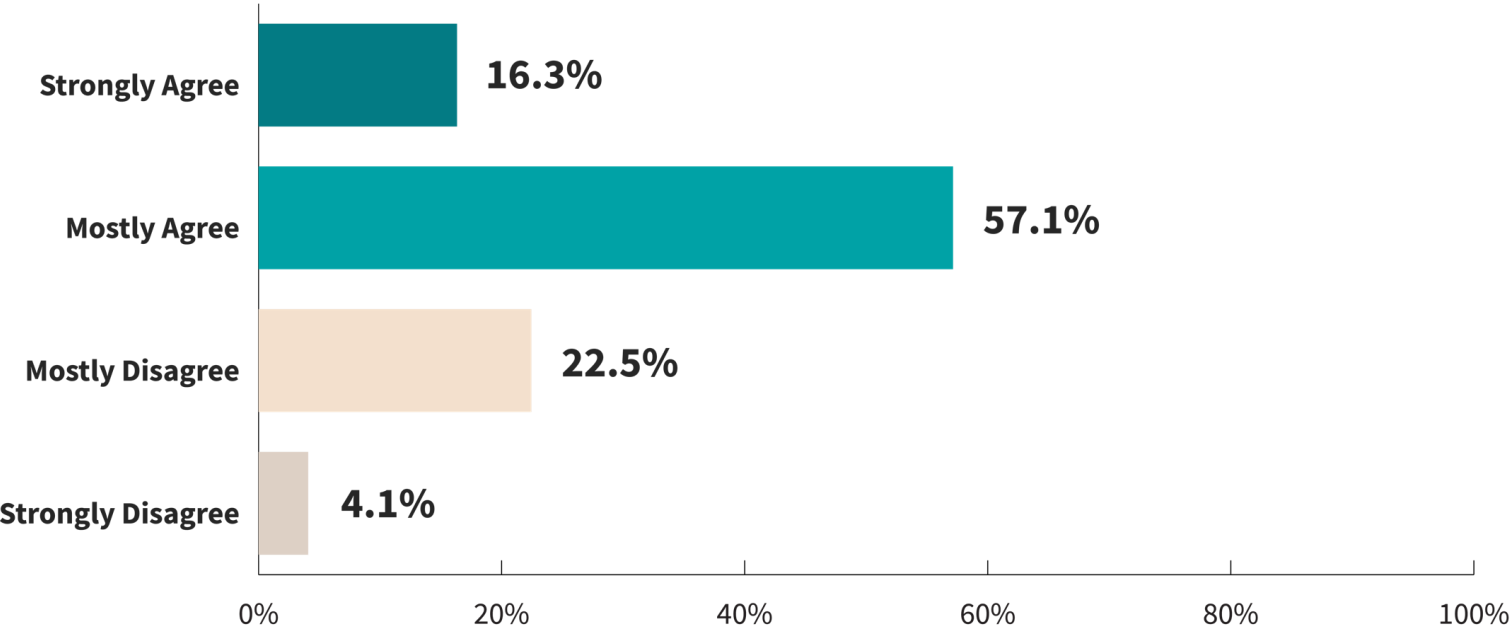


Our law firms are innovative.

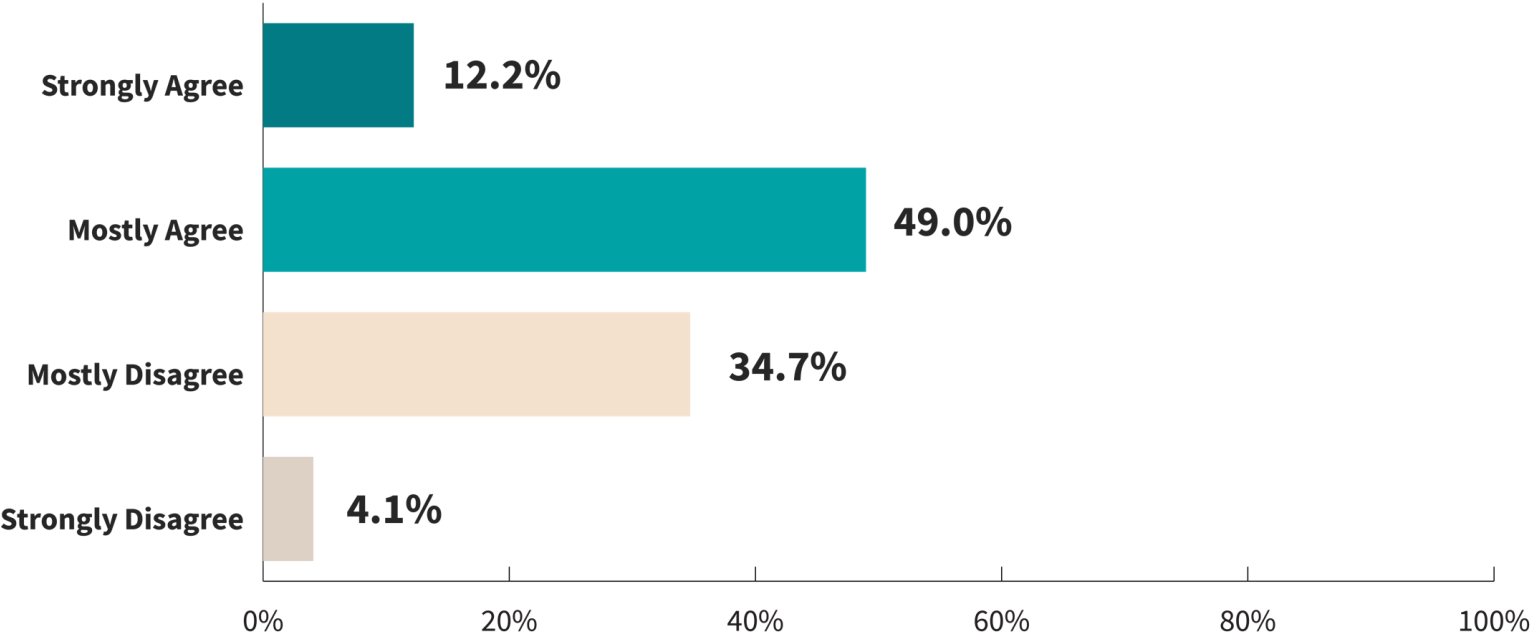




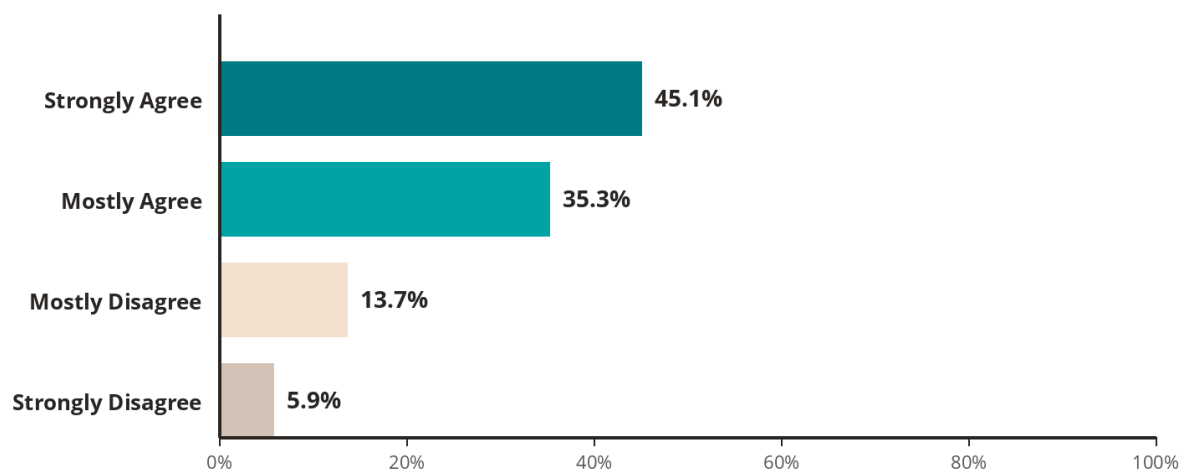
**ALSPs are leveraging technology to deliver legal services more effectively and cost-efficiently.**



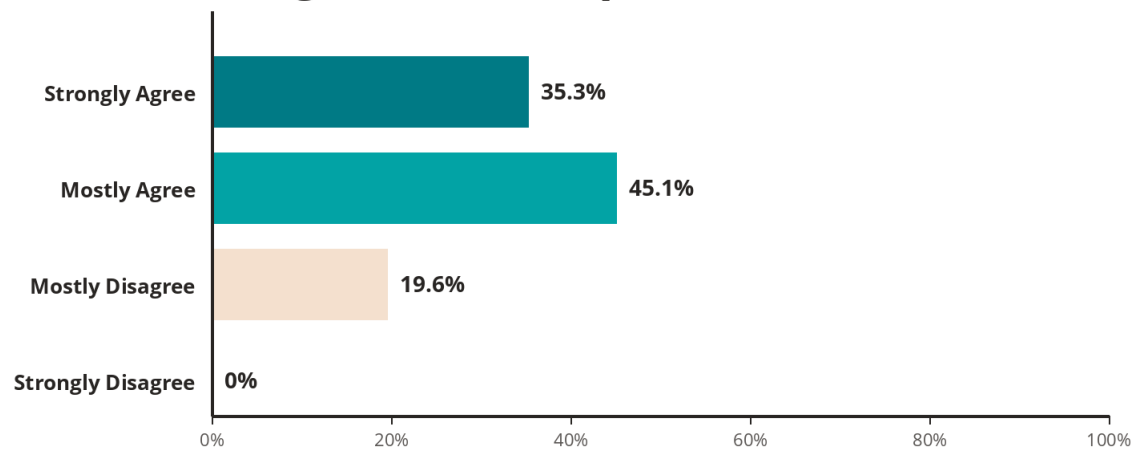
Our ALSPs are innovative.



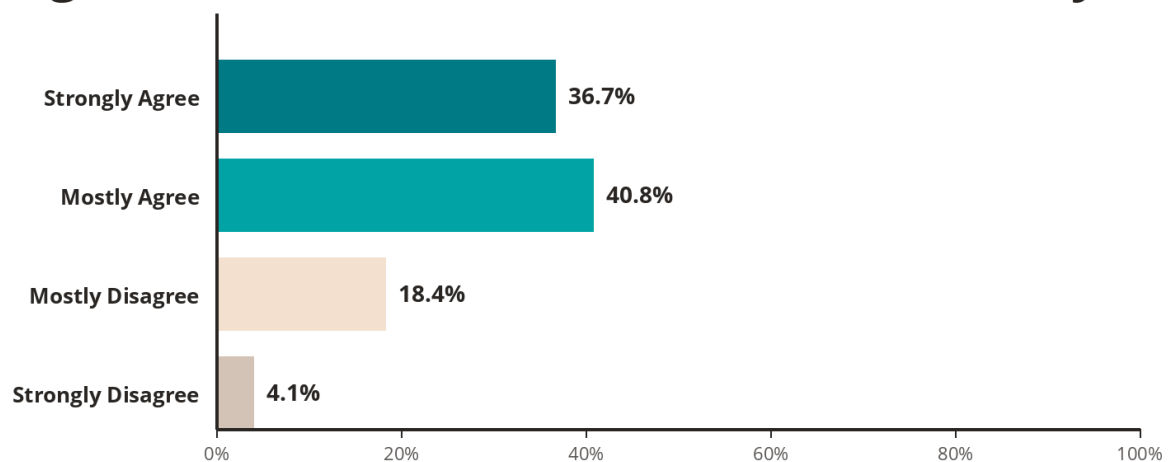
**I get all the support I need from my general counsel.**



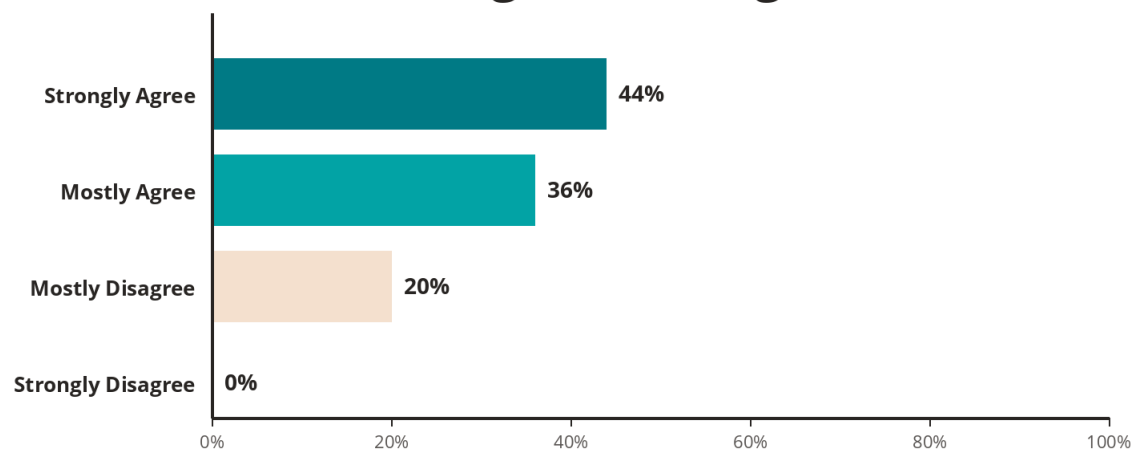
We have taken steps to establish legal workflow automation throughout the department.



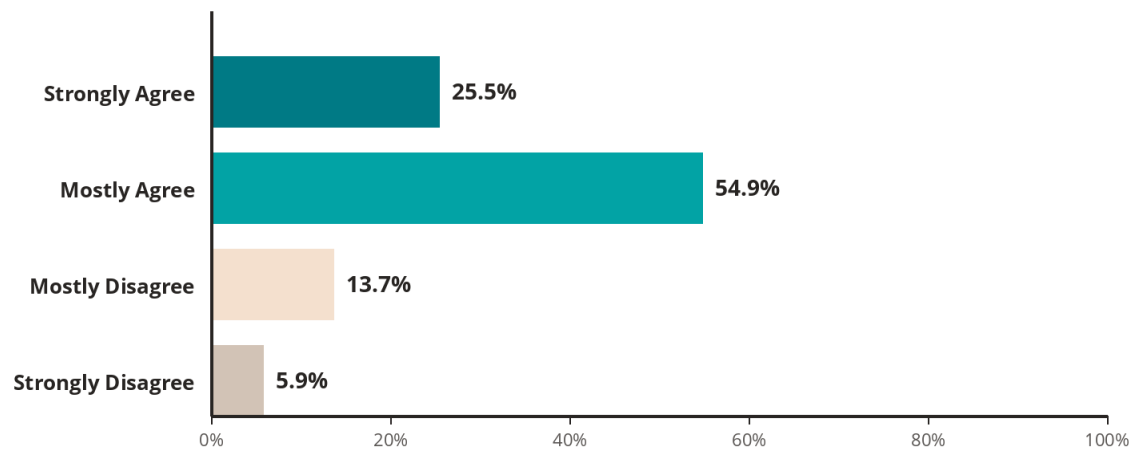
**I believe that work done under our alternative fee arrangements is more cost-efficient than hourly.**



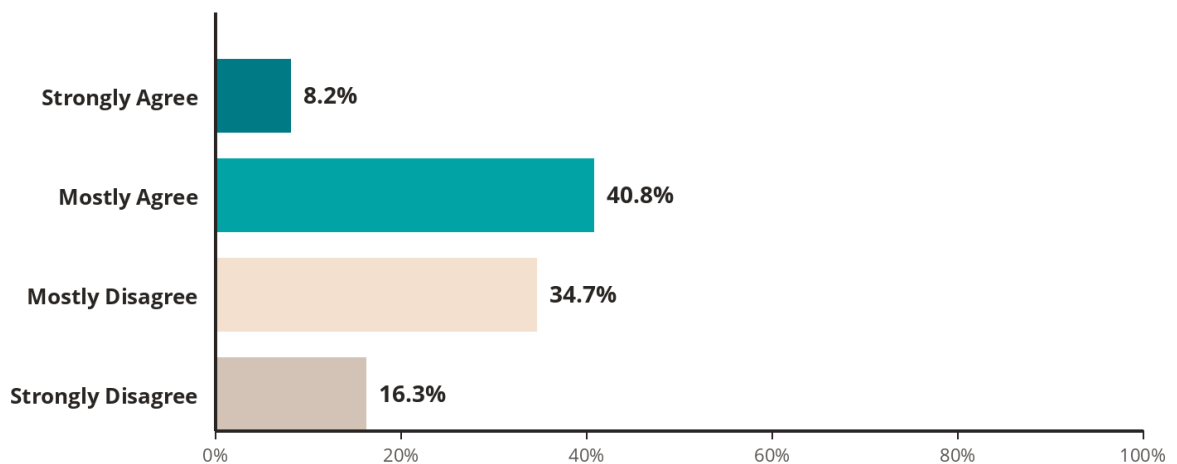
**Corporate law departments will be the primary driver of innovation and change in the legal sector.**



**Measuring the value of legal services is more art than science.**

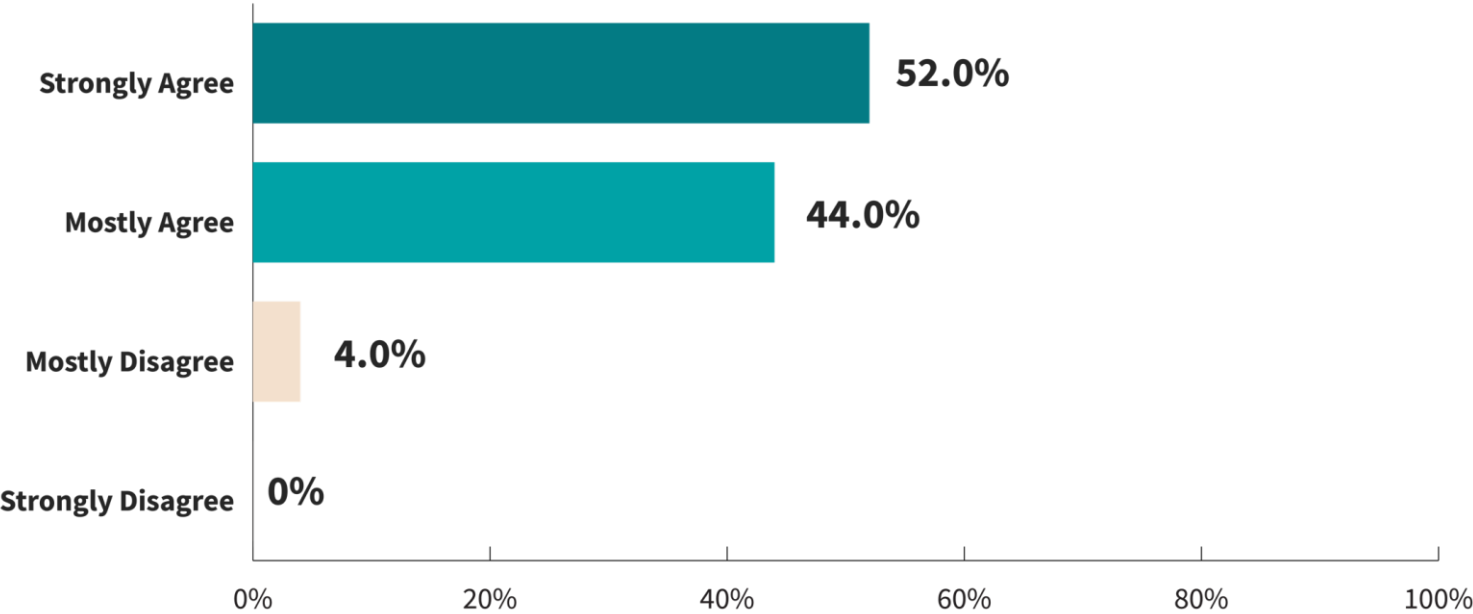


**Shadow billing is an effective way to measure the value of fixed fees.**

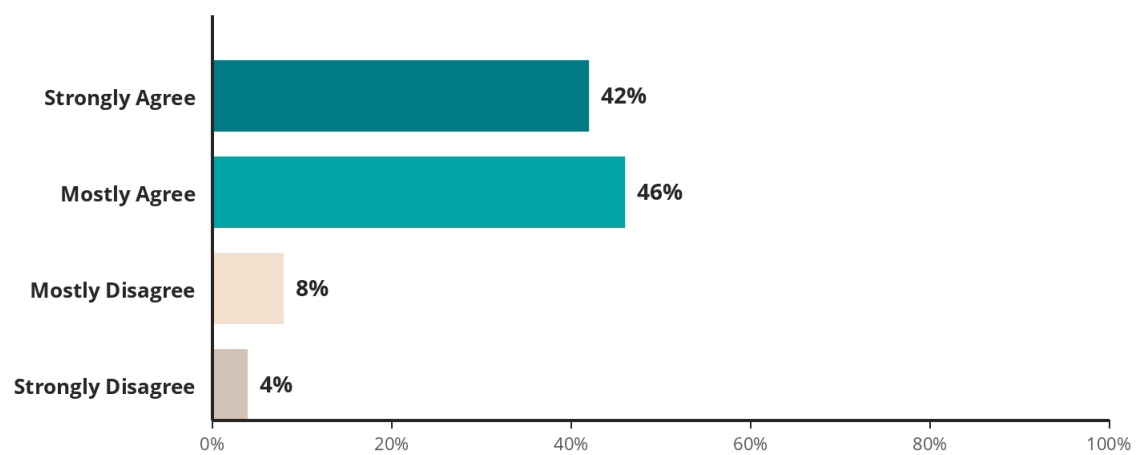




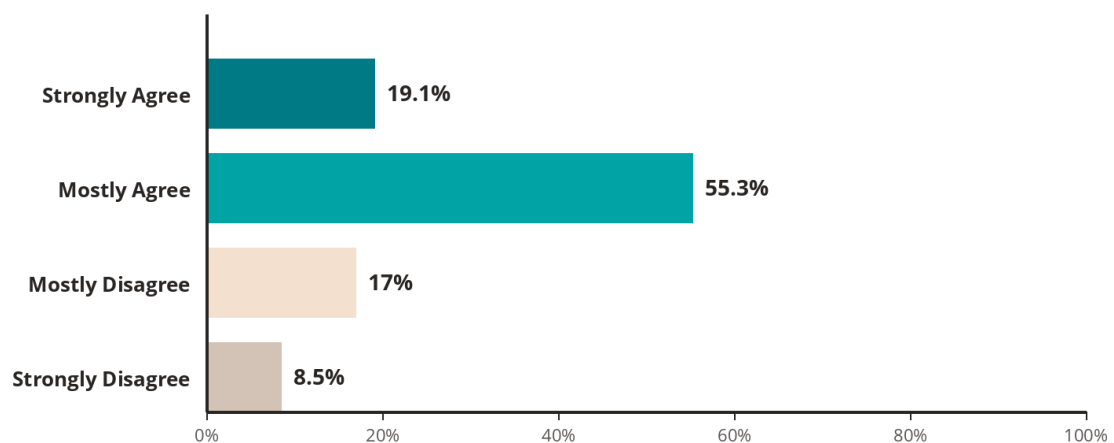
I would appreciate law firms approaching us more frequently with new legal service delivery models.



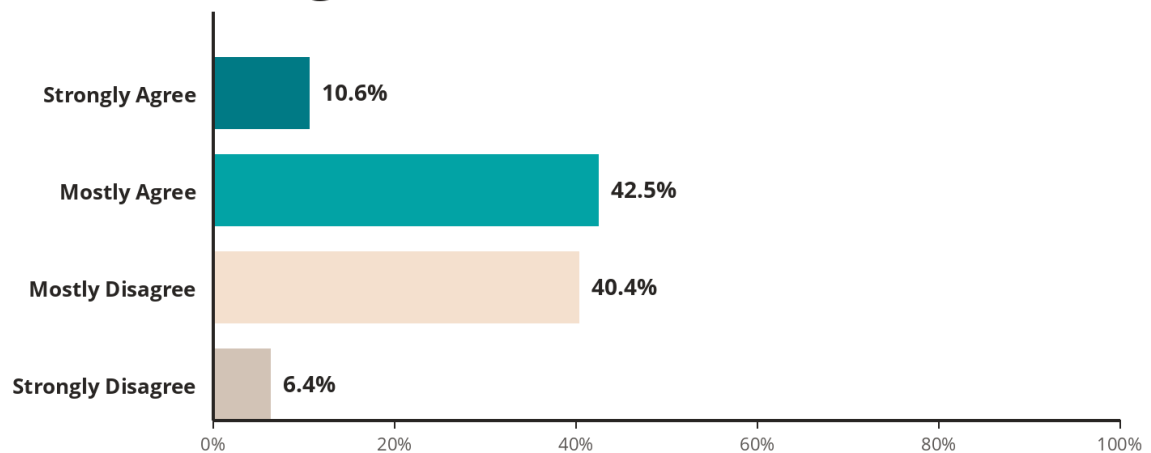
We are actively trying to cut costs by bringing more work in-house.



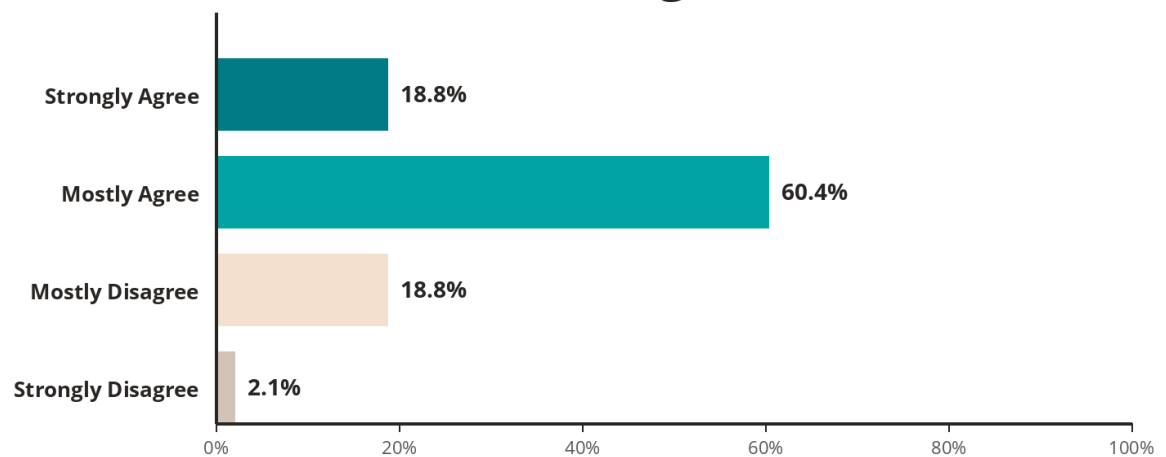
**Dedicated pricing professionals at law firms make it materially easier to drive innovation in fees.**



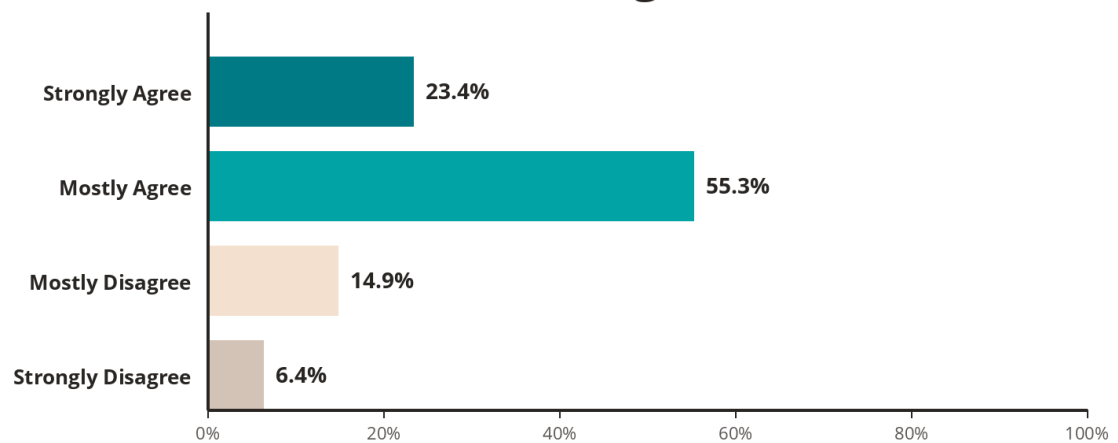
**I believe aggressive rate discounts are the best cost-savings tool and generate the most value.**



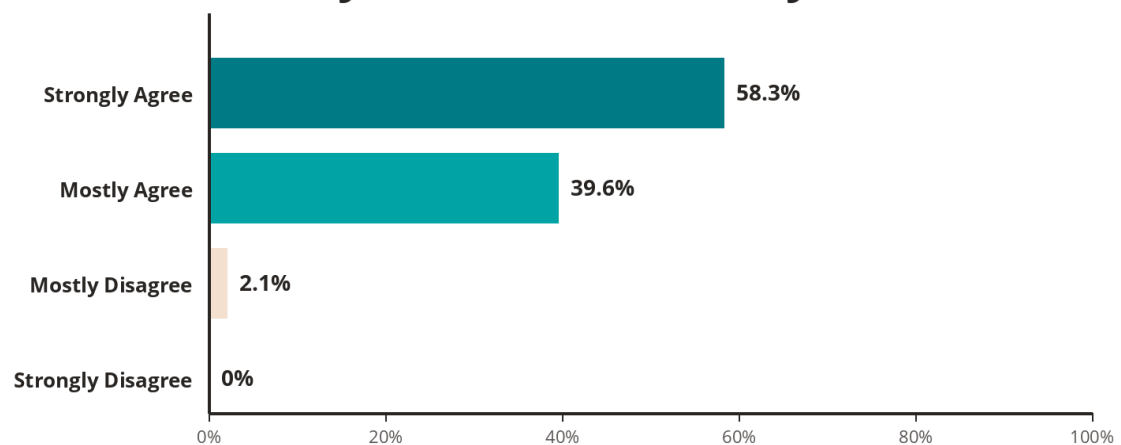
**I believe moving matters to firms with lower rates is an effective cost-savings tool.**



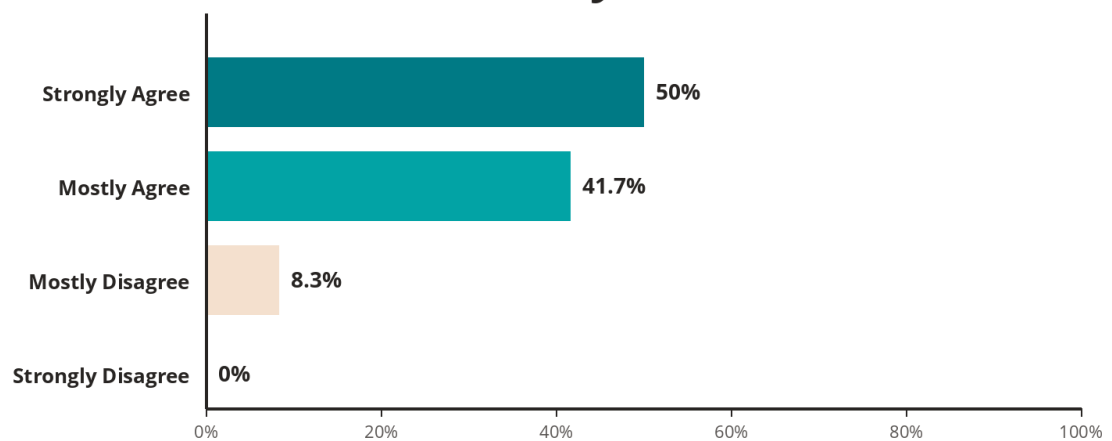
**I believe selecting firms with lower rates on new matters is an effective cost-savings tool.**



**I believe most law departments will be using GenAI substantially in the next three years.**

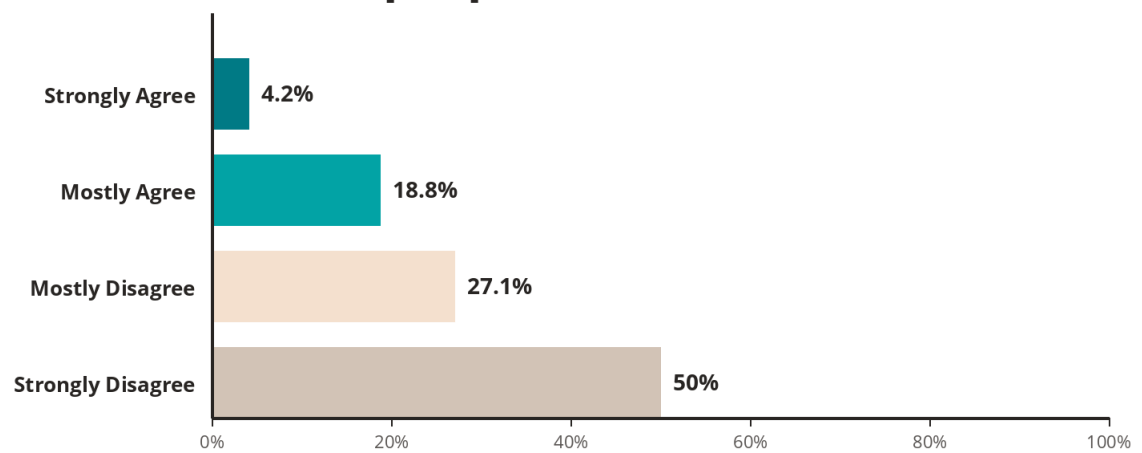


**I believe most law firms will be using GenAI substantially in the next three years.**

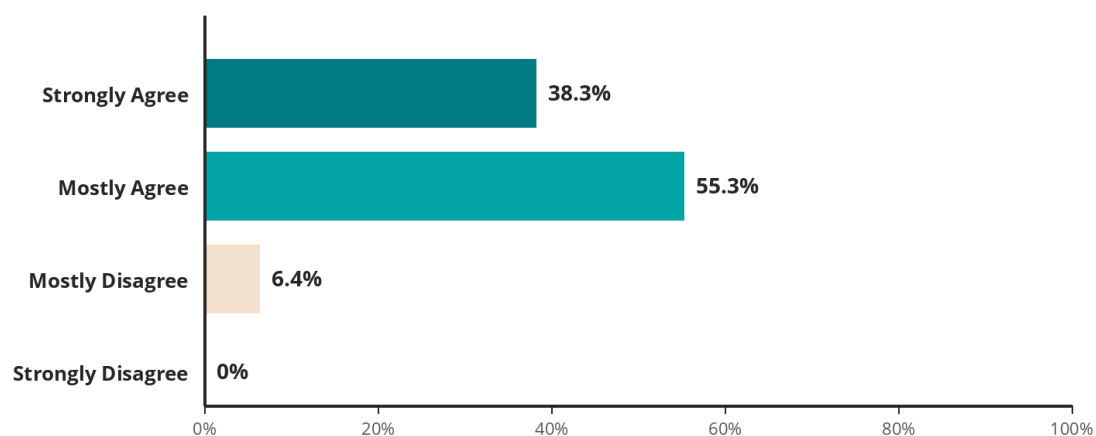




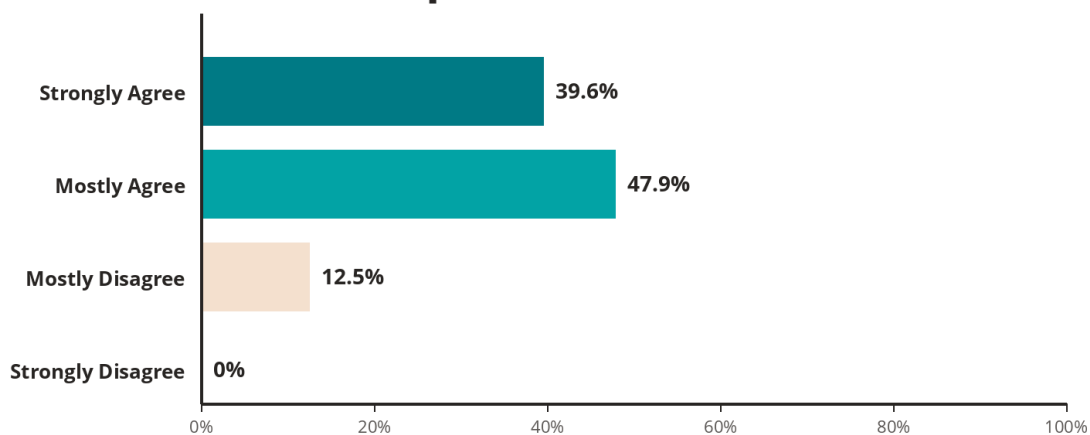
**We allow our law firms to use our data for GenAI training purposes.**



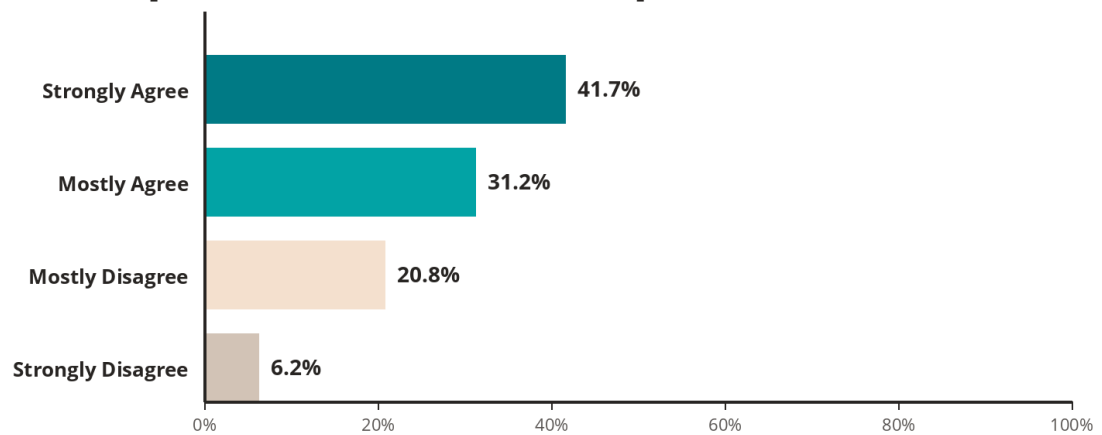
**We expect GenAI to enable us to bring more work in-house.**



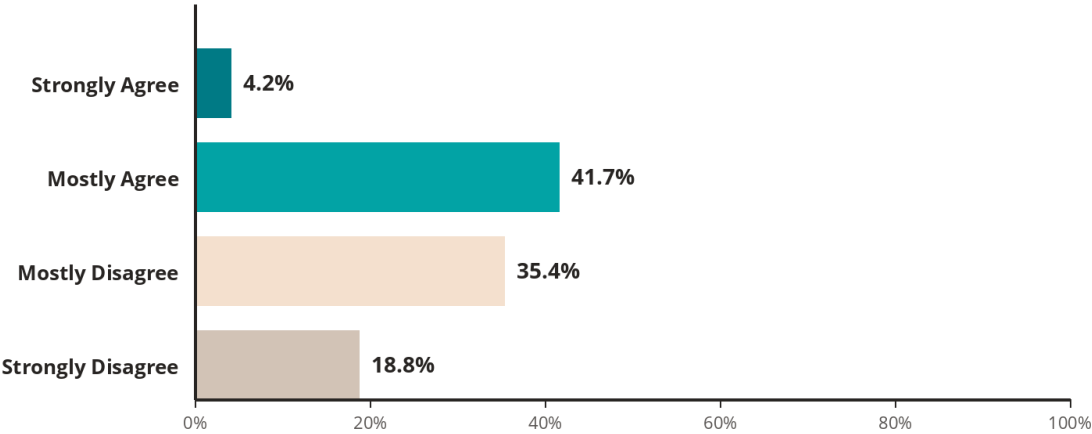
**I believe wider adoption of GenAI will lower our law firm spend.**



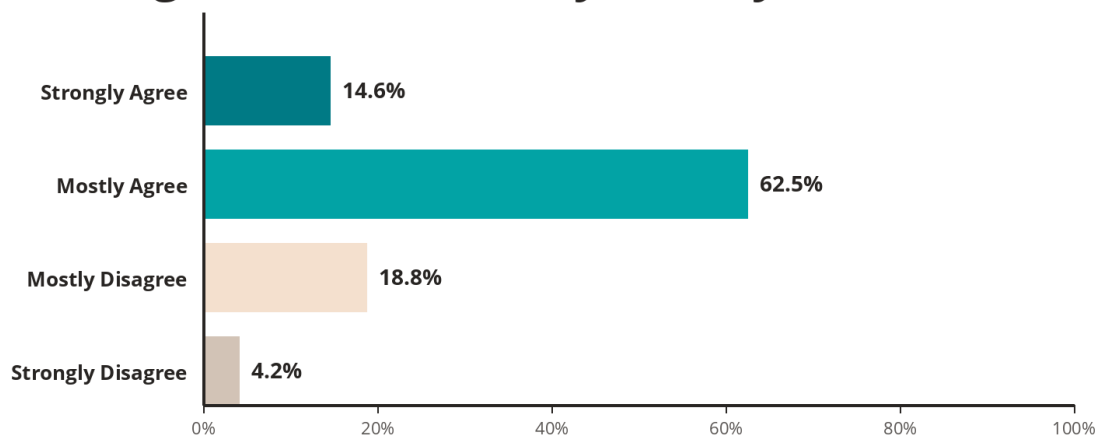
**I believe Shadow AI will become an increasing problem for corporations and law departments.**



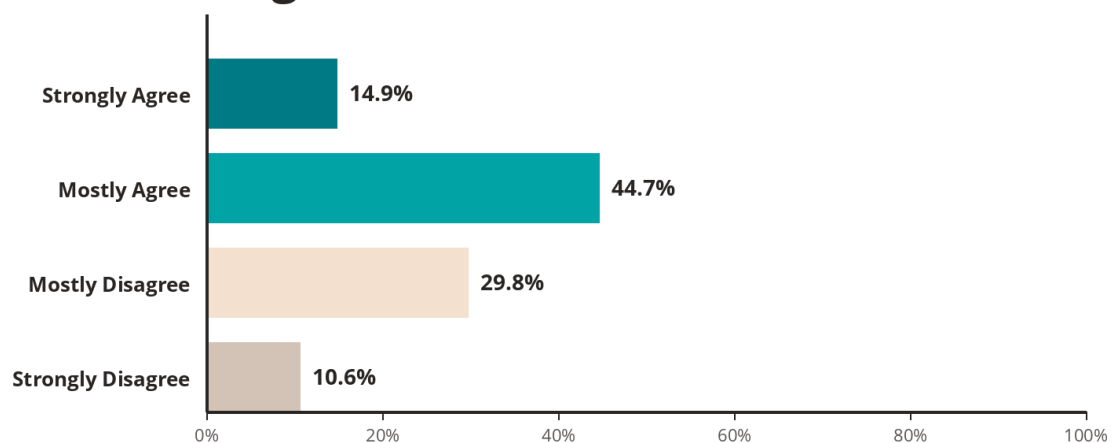
I trust GenAI vendors to safeguard and ethically use my data.



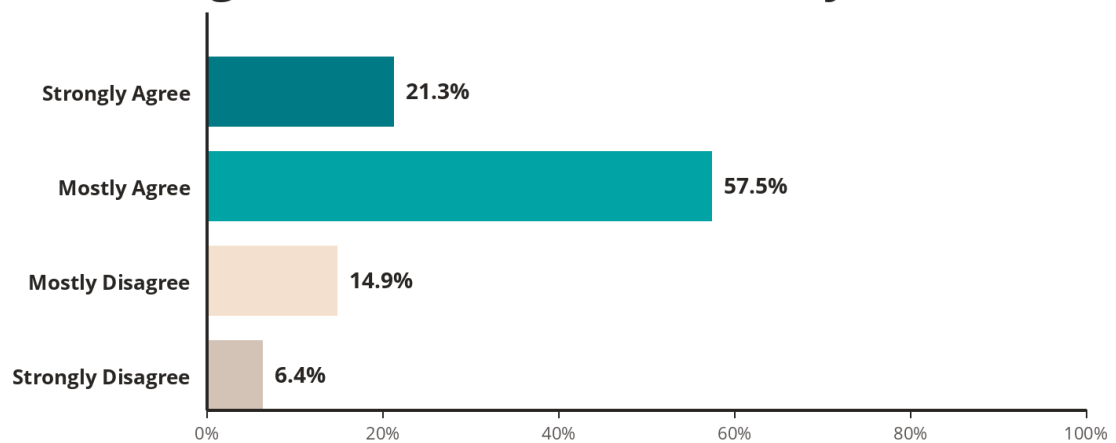
**I believe legal-specific GenAI vendors are more likely to safeguard and ethically use my data.**



**Firms will increase their use of AFAs/modified billing for work augmented with GenAI.**

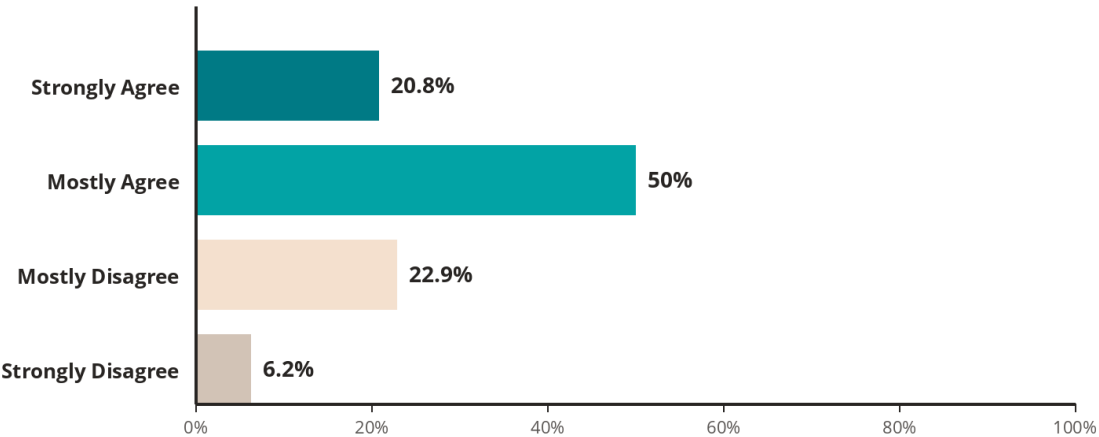


**I believe the value of legal services will go up if GenAI/LLM is integrated into service delivery.**

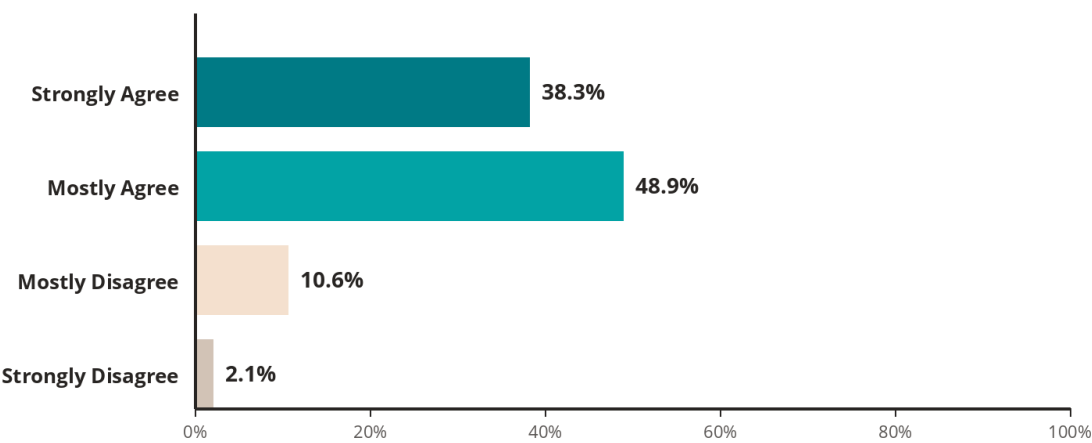




I believe most in-house teams will have AI seamlessly built into their workflows.



We are actively considering tools that leverage agentic AI.



By what percentage do you think your company’s legal spend would increase without a legal department operations function?

