

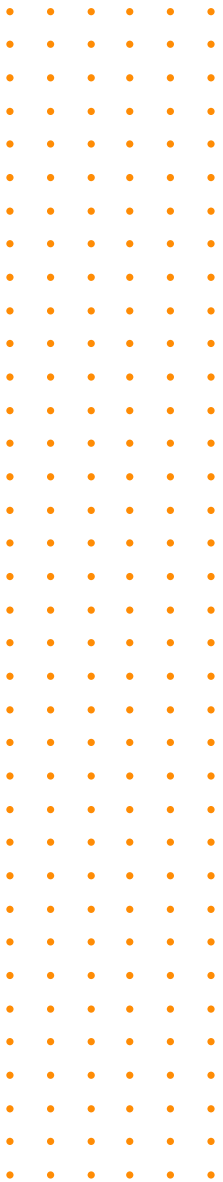
The Roadmap to Legal Transformation

A practical guide to reinventing legal
operations and driving innovation



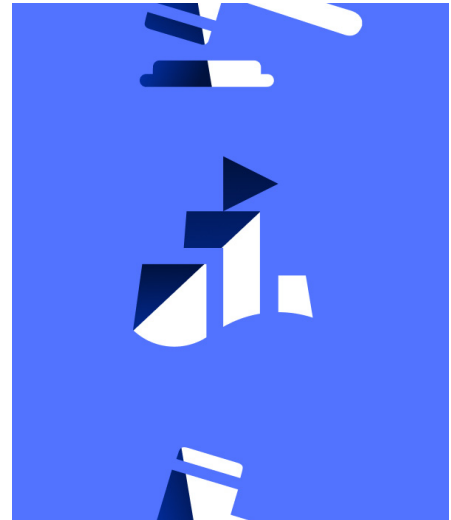
PART 1

The Legal Industry's Gridlock



The legal industry is operating under sustained pressure. Complexity is rising, expectations are shifting, and the systems that once supported legal work are no longer keeping pace.

This roadmap provides a way forward. It outlines the actions legal teams can take to counter this pressure, regain control, reclaim capacity, and lay the groundwork for long-term transformation.



Our Global Survey Report, *Beyond the Gridlock*, revealed a clear and consistent pattern: legal teams across regions and industries are facing the same compounding challenges of growing workloads, fragmented technology, expanding data volumes, and increasing cross-border obligations. While technology and budgets remain concerns, the single most pressing issue is operational: the overwhelming volume of work.

This is not simply a question of capacity, it's about the structure of how legal work is managed, and the workflows built for a previous time that no longer scale with today's complexity.

Legal teams today face a paradox: more work, fewer resources, and greater expectations, all handled through workflows built for a different era. The result? A constant state of reactive effort that leaves no time for proactive thinking.

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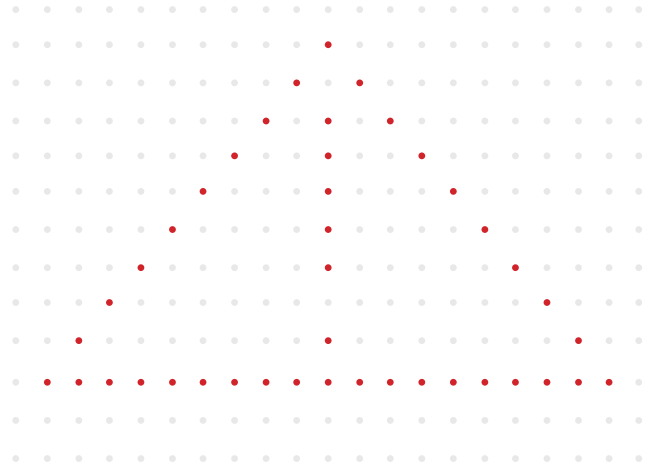
Tackling the challenges of policy review, technology implementation, and process streamlining—all while continuing to manage the daily legal work demands—can be daunting

- Senior Legal Operations

A system under strain

The underlying issues are interconnected. Manual processes slow everything down, fragmented systems limit visibility, new data types defy traditional review methods and AI tools are being introduced on top of outdated workflows, without integration, governance or clear oversight.

Despite these constraints, legal teams are actively looking for better ways to operate. There's a clear desire to contribute more strategically and increase the impact of the legal function. The challenge is finding the space to act while delivering on day-to-day demands.



Where this roadmap begins

This roadmap begins at the critical moment when a legal team decides to stop spinning its wheels and take back control.

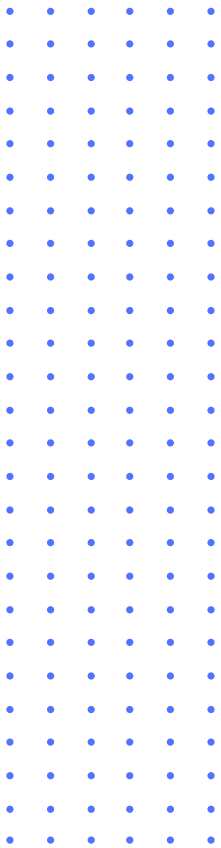
It guides you through the stages to transformation, starting with how to identify operational gridlock, followed by targeted operational reinventions that reduce complexity and ease the burden of daily workloads. These improvements create the clarity and space needed to then pursue a broader, strategic transformation.

This is a practical framework for legal teams ready to move from gridlock to growth. Starting with operational reinventions, then advancing step-by-step toward a stronger, more scalable legal function.



PART 2

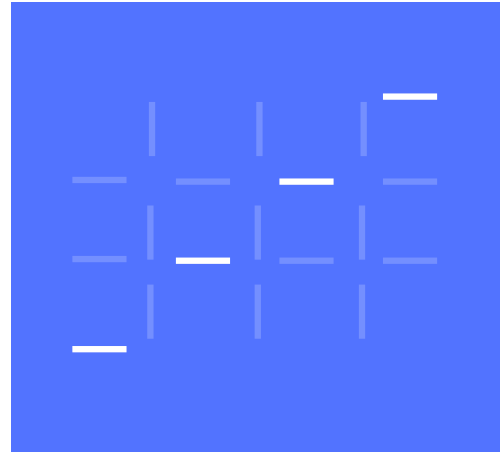
Reinventing Legal Operations



The foundation for lasting change

Transformation is a series of small, deliberate steps that compound over time.

Legal teams making the most progress are not waiting for the perfect tool or the next budget cycle. They are addressing the everyday inefficiencies that slow work down, delay decisions, and erode capacity. These targeted, operational reinventions are clearing the way for something larger.



Our survey revealed that teams are prioritizing practical, high-impact improvements, particularly in areas like contract management, compliance, and legal project management. These shifts may appear incremental, but their effect is compounding. They restore time, reduce noise, and reintroduce clarity.

That's the key to this kind of reinvention: it creates space for you to think. The mental bandwidth to step back from the minutiae, to challenge assumptions, and to find clarity on the bigger picture. And clarity is where long-term transformation begins.

Where legal teams are focusing their reinventions

48%

Contract
management

42%

Compliance & risk
management

40%

Information
governance

Survey data shows teams are starting with practical, high-impact areas that compound into lasting change.



Be proactive, don't sit back and watch, instead learn, test and if you fail then fail fast and move on

- Senior Legal Operations

What operational reinvention looks like

Operational reinvention means identifying what's slowing you down and redesigning it with purpose. It is a methodical approach to improving how legal work flows, not by doing more, but by removing what no longer serves.

High-performing legal teams are focusing on six key areas where small, strategic changes drive meaningful improvement:



	THE ISSUE	START HERE	ACTION
Workflows	Most operational drag occurs in the transitions; where intake is unclear, handoffs are inconsistent, or escalation lacks defined criteria.	Map how requests enter, move through, and exit the legal function. Focus on triage, escalation, and resolution.	Run a one-hour cross-functional workshop to review real examples. Document the pain points. Prioritize fixes that reduce cycle time or dependency.
Contract Management	High-volume agreements, like NDAs or vendor contracts, consume disproportionate time and introduce risk through inconsistencies.	Select one contract type and build a streamlined, standardized path.	Develop a playbook, align stakeholders, and define approval routes. Only once the process is stable should technology be layered on.
Technology Stack	Tools added in isolation often duplicate functionality, create confusion, or fail to integrate with existing systems.	Audit the current toolset and score each by usefulness, integration, and adoption.	Eliminate or consolidate low-value tools. Engage legal ops and IT early when assessing future investments.
Compliance Integration	Compliance risk often stems from process gaps, not lack of intent.	Identify high-risk workflows, particularly those involving vendors, data sharing, or multi-jurisdictional matters.	Embed preventative compliance checks at key decision points. Use lightweight prompts, not heavy procedures.
Automation	Repetitive, manual tasks divert attention from strategic work.	Identify one task repeated weekly that can be automated without system overhaul.	Use accessible tools (e.g., Outlook rules, workflow automation platforms) to automate triage, approvals, or responses. Track the hours saved.
Data	Legal teams often have access to data but lack the insight to translate it into action. This applies both to portfolio visibility (clear metrics on matter volume, cycle times, bottlenecks) and to data handling (ensuring that information is collected, processed, stored, and disposed of responsibly).	Identify 2–3 core metrics your stakeholders care about, such as time to resolution, matter volume by category, or backlog status. At the same time, review how data is governed across its lifecycle to ensure integrity, compliance, and defensibility.	Build a dashboard that surfaces insights, not just numbers, and establish lightweight policies for how data is managed day-to-day. Focus on clarity, not completeness.



Finding your gridlock

Use this list to identify the area's most in need of reinvention.

Workflows and process clarity

- ☐ Do we have a clearly defined intake process for legal requests?
- ☐ Is it easy to triage and assign incoming work?
- ☐ Can we track where each matter is in its lifecycle without asking around?

Contracting

- ☐ Are high-volume contracts handled through a standardized process?
- ☐ Do we have a clause library or templates that reduce drafting time and review cycles?
- ☐ Is contract status visible to both legal and business teams?

Technology use and overlap

- ☐ Do we know which legal tools are being actively used and which are underutilized?
- ☐ Are our tools clearly differentiated, with each serving a distinct purpose?
- ☐ Are our tools integrated, or are we manually transferring information between systems?

Compliance integration

- ☐ Are compliance checks embedded into day-to-day workflows?
- ☐ Is there clarity on when and how compliance should be engaged?
- ☐ Are we confident that nothing is falling through the cracks?

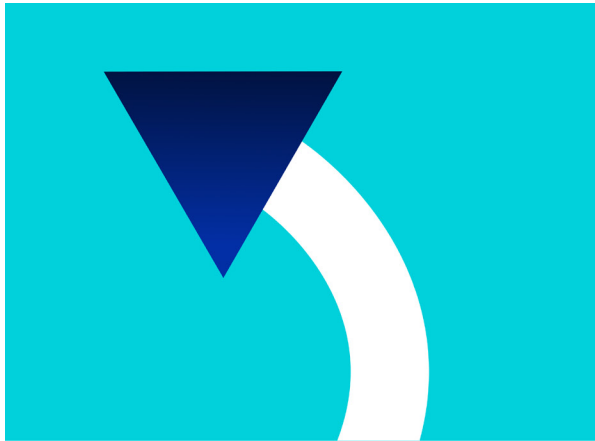
Team efficiency and workload visibility

- ☐ Do we know how long core workflows take?
- ☐ Are our workflows and handoffs running smoothly without consistent delays or bottlenecks?
- ☐ Do team members have clear visibility into status updates without duplication of effort?

Data and reporting

- ☐ Do we have visibility into key operational metrics?
- ☐ Can we answer the GC's or CFO's most common questions without manual reporting?
- ☐ Do we have a single source of truth for client and matter data, or are we relying on shadow spreadsheets?

Roadblocks and how to move past them



Every reinvention effort encounters resistance. Some are structural, others are cultural, but all can slow momentum if left unaddressed. Understanding these roadblocks early helps legal teams anticipate resistance, prepare targeted responses, and keep progress on track.

People

Change can trigger defensiveness, especially if team members feel their current ways of working are being replaced. Anchor your message in potential improvement, not criticism. Use early wins and data to show the benefit clearly.

Process knowledge

If no one fully understands how a workflow operates from end to end, fixing it becomes guesswork. Take time to map out what's currently happening. Invite input across functions. Clarity is the first step toward better design.

Budget

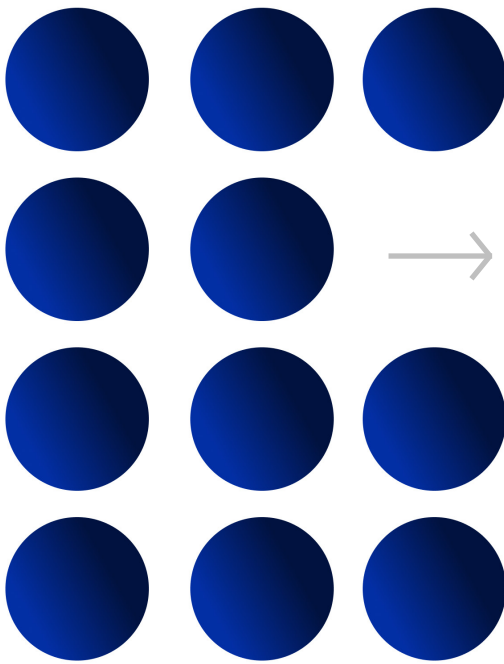
Many improvements don't need funding to get started. Streamline meetings, fix document templates, clarify escalation paths—these are changes within your control that build momentum and unlock future investment.

Time pressure

Teams often deprioritize change because they're buried in daily demands. That's why small, targeted shifts are effective. Focus on one process, measure the impact and use that success to carve out space for what's next.

Unclear ownership

When no one owns the change, it stalls. Assign a lead for each reinvention effort. Give them support, visibility, and decision-making power to keep things moving.



How to lead the change

Every successful reinvention effort needs someone to lead the charge. It starts with an email, a one-hour meeting and a few willing collaborators. The most important thing is change requires a starting point.

Engage early and collaboratively

Involve the people who use the process daily. Their input builds trust and ensures relevance.

Pilot, then adapt

Launch small changes, gather feedback, refine quickly. Don't aim for perfection, aim for momentum.



Choose a focused starting point

Identify a single, high-friction process that affects speed, consistency, or user experience.



Communicate with precision

Replace assumptions with facts. Use clear metrics to define improvement.



Build internal advocates

Colleagues who experience the improvement firsthand will become the best champions for what comes next.

Quick wins you can implement today




These five actions can be implemented with minimal resources and deliver results fast:

- ☐ Track turnaround times for one key workflow
- ☐ Automate responses for common queries
- ☐ Create a dashboard with three operational KPIs
- ☐ Consolidate or sunset one underused legal tool
- ☐ Build a clause library for high-volume contracts

How to measure reinvention

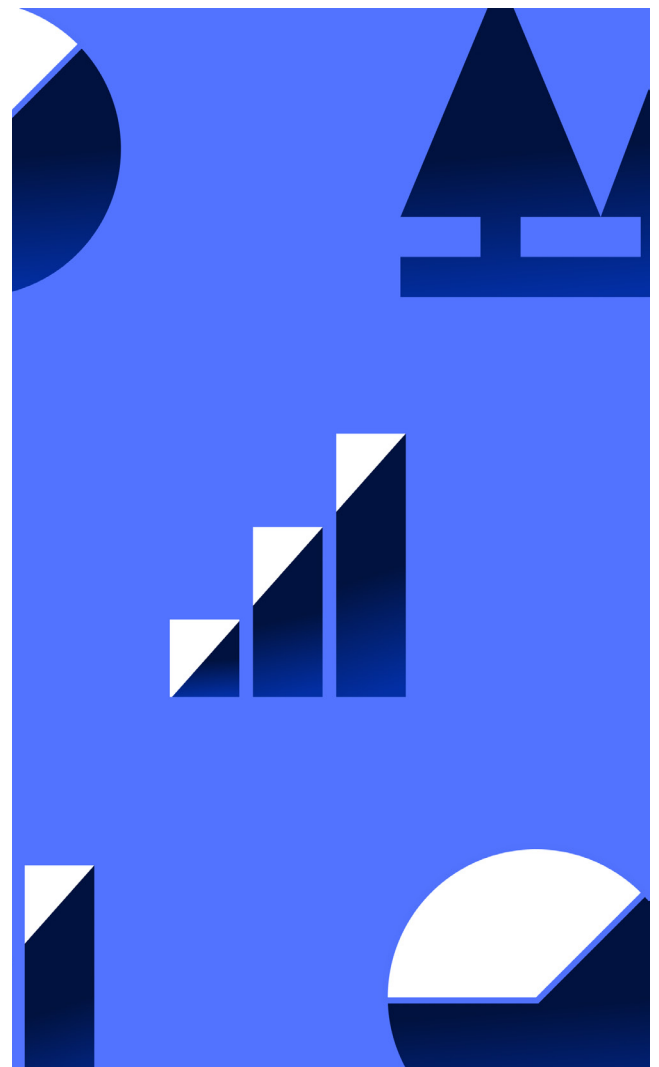
Visible progress creates momentum. Tracking the right metrics helps teams demonstrate value, earn stakeholder confidence, and make the case for continued investment.

Focus on changes that clearly improve operational performance:

-  Hours saved per task or process
-  Number of steps removed from a workflow
-  Time from request to resolution
-  Reduction in escalations or rework
-  Fewer platforms, templates or entry points

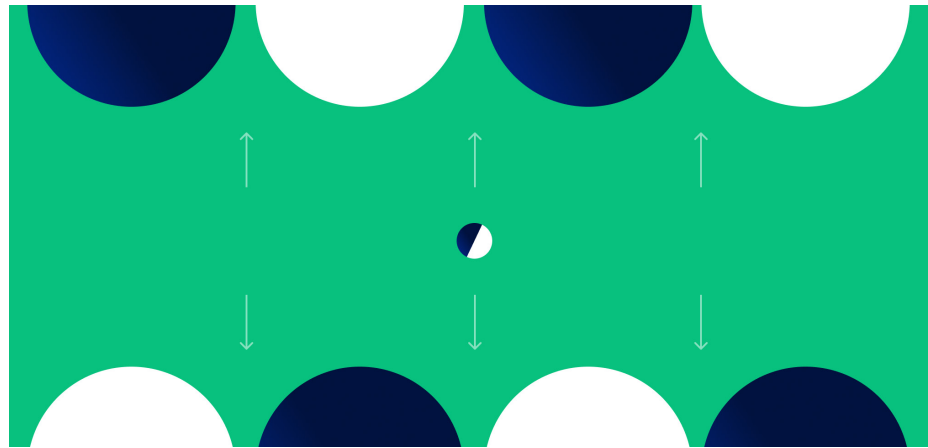
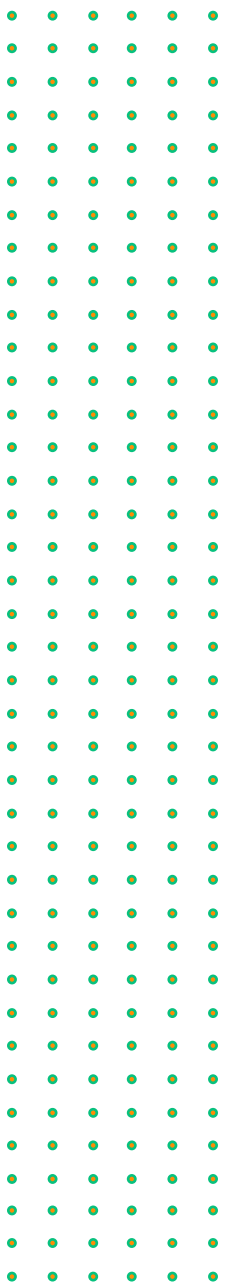
Keep the reporting simple and focused. Share wins with leadership, highlight what's working, and use those results to move to the next priority.

Reinvention scales when progress is visible, repeatable, and tied to outcomes the business cares about. Show what's working, and others will follow.



PART 3

Making Room for Strategic Transformation



From operational space to strategic scale

Each reinvention, whether it is a faster intake process, a streamlined contract, or an automated task, creates time. Those reclaimed hours give legal teams the chance to step back from daily demands. It is the moment when firefighting slows, inboxes quiet, and space returns to think, plan, and lead.

Time needs direction. Without intent, it will be absorbed again by urgent requests and ingrained habits. With focus and discipline, it becomes a resource that powers lasting change. Effective teams commit their time to structured improvement efforts. They launch short projects with defined outcomes, run weekly sessions to reset priorities, and hold forums that bring business and legal stakeholders into alignment. This discipline ensures progress even under heavy workloads.

This is the inflection point where reinvention transitions to transformation.

Small reinventions generate capacity. Capacity supports structured planning. Planning creates the path to transformation. The challenge now is to use the time you have created to actively shape the legal function you want.

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The more you can embrace innovation and technologies that will produce efficiencies, the more time you'll have to concentrate on the strategic side

- Senior Legal Counsel

What readiness looks like

Operational improvements create the ideal conditions for something greater. Transformation is the ultimate goal and requires shared direction, engaged stakeholders, and a clear understanding of where change will have the greatest impact.

Here are the signs your team might be ready:

Core processes are simplified, documented, and running more efficiently.

There is leadership interest in evolving the legal function beyond reactive service delivery.

Team members are engaged, aligned, and contributing new ideas.

Operational metrics are being tracked and used to drive decisions.

Clear problem areas have been identified where new systems or automation could add value.



Is your team ready for transformation?

How prepared is your team to embrace change and future-proof the way you work? This quick quiz will help assess your team's readiness for transformation

Answer YES or NO to the following questions.

	YES	NO
Our team regularly evaluates and updates workflows to improve efficiency.	<input type="checkbox"/>	<input type="checkbox"/>
We have leadership support for exploring and adopting new technologies.	<input type="checkbox"/>	<input type="checkbox"/>
We allocate time and resources for training and upskilling team members.	<input type="checkbox"/>	<input type="checkbox"/>
Our team is adaptable and open to change when new processes or tools emerge.	<input type="checkbox"/>	<input type="checkbox"/>
We have piloted or implemented new technology in the last 12 months.	<input type="checkbox"/>	<input type="checkbox"/>
We actively monitor legal tech trends and discuss their impact on our work.	<input type="checkbox"/>	<input type="checkbox"/>
We have team members or partners with expertise in legal technology.	<input type="checkbox"/>	<input type="checkbox"/>
We have a dedicated budget or funding for innovative projects.	<input type="checkbox"/>	<input type="checkbox"/>
We collaborate with external partners to explore new solutions and strategies.	<input type="checkbox"/>	<input type="checkbox"/>
Our team seeks feedback and iterates on the new processes or technologies we adopt.	<input type="checkbox"/>	<input type="checkbox"/>

Your score : add up how many times you answered YES.

8-10 | Innovation Leaders

Your team is ahead of the curve, with the right structures, support, and culture to drive legal innovation. Now's the time to scale your efforts, explore AI adoption, and optimize workflows for even greater efficiency with major transformation.

5-7 | Innovation Intermediates

You're on the right path but have opportunities to refine your strategy. Focus on leadership buy-in, piloting new tools, or expanding your legal tech expertise. Small improvements could elevate your team into the leadership category.

0-4 | Innovation Beginners

Your team has untapped potential but may need a shift in mindset or resources to drive innovation. Start by identifying one or two areas to strengthen, such as leadership support or workflow optimization. Every step forward builds a foundation for future success.

What does transformation look like?

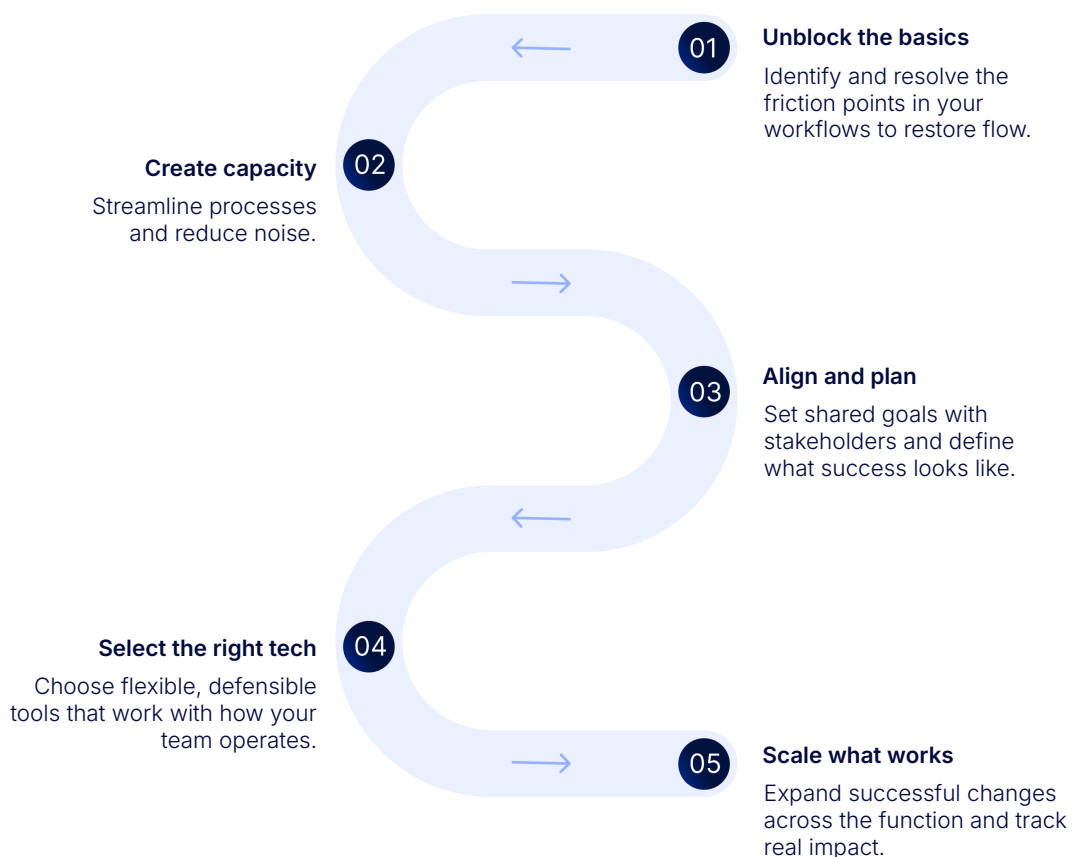
Transformation means rethinking how legal work is structured, delivered, and measured. It brings together streamlined operations, connected systems, and meaningful data to create a legal function that operates with clarity, scale, and purpose. Technology plays a key role, enabling legal teams to work more strategically and deliver greater value to the business.

Picture this :

instead of chasing redlines across disconnected tools, your team sees every open matter, every risk flag, and every bottleneck in one unified view. Strategy replaces guesswork. Your legal team moves from reactive support to proactive leadership.



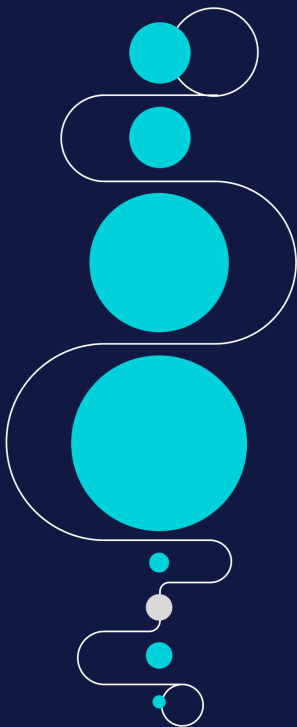
Transformation is a journey. It's important to follow a phased approach that gives you time to learn, iterate, and scale.



You've laid the groundwork. Now it's time to think bigger—about the systems, partnerships, and infrastructure that will carry transformation across the entire legal function.

Partnering for strategic transformation

At this pivotal point in your legal transformation journey, success depends not only on your internal readiness, but on choosing a partner who can help you scale with confidence. The right partner will not only implement transformative technology; they'll challenge assumptions, support change, and forge a strategic alliance that will propel your legal function into a new era of efficiency, insight and value creation.



What to look for:

Deep legal expertise: A partner with a profound understanding of legal workflows, data management, and risk mitigation.

Proven use-case alignment: Demonstrated success in addressing specific legal challenges similar to yours.

Transparent implementation: Clear communication of milestones, roles, and expectations throughout the transformation process.

Scalable architecture: Solutions that are flexible and adaptable to your evolving needs.

Robust security measures: Built-in controls that ensure data integrity and compliance.

Collaborative mindset: A willingness to listen, adapt, and co-create solutions that align with your objectives.

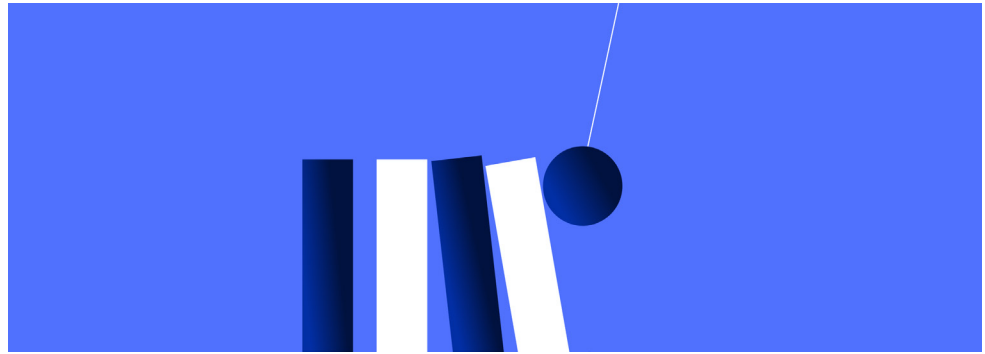
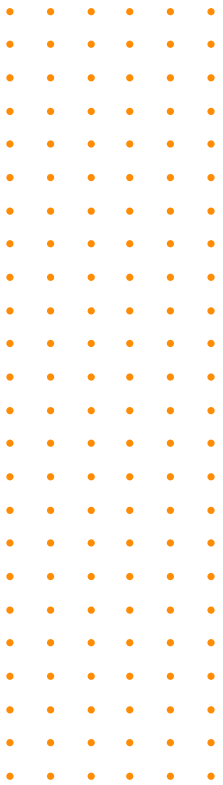
Smart transformation depends as much on the partner as it does on the platform.

Engaging such a partner transforms the abstract concept of change into a tangible, actionable plan. It marks the transition from operational reinvention to strategic transformation, setting the stage for a legal function that is not only efficient but also resilient and forward-thinking.

This is where transformation begins...

PART 4

Transformation



Legal work isn't slowing down. The volume of matters, data, and decisions continue to rise, putting teams under pressure to respond faster, work smarter, and maintain control in increasingly complex environments.

Teams that have simplified their operations are now building the infrastructure to thrive under this pressure. Transformation means shifting from scattered, reactive processes to a connected legal function, one that delivers clarity, speed, and value at scale.

Here's what you should be prioritizing:



Control

Visibility across all data, matters and systems is a non-negotiable. Legal teams need to know what's happening, where, and why. You should be in control of your own data, with clarity over your operating environment, so decisions can be made with confidence.



Speed

Teams need faster access to the right information, surfaced at the right time, so they can make strategic decisions sooner. That means cutting through noise, accelerating insight, and eliminating delays that hold work back.



Simplicity

Disjointed tools and complex processes create drag. Simplify systems, standardize how work is done, and unify your platforms so that they're seamless.



Intelligence

Intelligence comes from connecting that data across matters, spotting patterns early, and turning insight into proactive decisions.



Innovation & Value

Invest in systems and structures that support continuous improvement and can adapt and evolve with your needs.

Choosing solutions that deliver

Technology is one of the defining enablers of transformation. It is the difference between incremental improvement and scalable impact. The systems you choose now will shape how your legal function operates, evolves, and delivers value in the future.

To operate at this level, legal teams need technology that aligns with how they work and where they are headed. The right platform simplifies complexity, connects fragmented systems, and provides the flexibility to adapt as needs evolve. You also need a partner who is leading the way in innovation, driven to keep pace with rapid technological change and committed to ensuring your transformation continues long into the future.

While technology is transformative, technology alone is not enough to sustain it. The partner you choose matters just as much as the platform. You need a provider who can combine innovative tools with proven expertise, services that flex with your needs, and guidance you can trust. A partner who is not bound by one system, but focused on creating solutions that work in your world.

This is where transformation takes hold, when technology, services, and expertise come together to deliver impact.



Consilio: where innovation meets impact

Consilio delivers powerful solutions for today's complex legal challenges. Our integrated approach brings together innovative technology, cost-effective services, and deep expertise to create secure, efficient outcomes that minimize risk. These are the foundations that drive true transformation and they are powered by a relentless focus on innovation.

Here's how we put transformation into action:

- Unify systems, streamline data, and enable AI that works in your workflows
- Unlock speed, efficiency, and quality through expert deployment of AI, TAR, and advanced analytics
- Strengthen compliance integration by embedding oversight into everyday processes
- Add capacity and expertise through flexible talent and advisory services
- Embed sustainable transformation that elevates performance long term

Consilio helps legal teams operate with precision, lead with confidence, and adapt to whatever comes next. By combining exceptional technology, industry-leading AI with expert oversight, and a holistic approach to legal services, we deliver solutions that are seamless, effective, and built to evolve with your needs.



Move beyond the gridlock, for good.

You've identified the blockers. You've tested solutions. You've proven what works.

Now the opportunity is bigger.

Transformation doesn't require a perfect moment. It requires a strong foundation, and a decision to move forward.

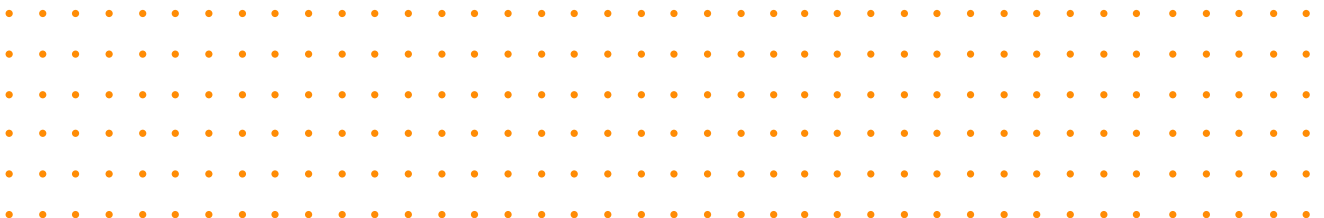
Whether you're refining operations or ready to scale, the next step is clarity: the right plan, the right priorities, and the right infrastructure to support them.

Consilio brings the expertise, services and innovation to help legal teams move beyond gridlock and create lasting transformation.

This is the roadmap. The first step is yours.



The partner you need for
legal transformation.



Your Roadmap to Transformation

Use this space to capture what matters, define your next steps, and shape a path forward that works for you.

Priorities

What are the top 2–3 areas in your legal function that need transformation?

➤ _____

➤ _____

➤ _____

Barriers to address

What's holding you back right now?

☐ _____

☐ _____

☐ _____

Quick wins

List one small step you can take this quarter to build momentum.

Big goals

What does success look like in the next 12–24 months?

