

2026 Vision: Driving Profitable Change with AI, Client Experience, and Data

Solution Series Webcast, ALA

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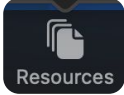


Session Best Practices

60-minute webcast

–

Session is being recorded and will be available post-event

- Use  to engage with attendees
- Use  to ask questions directly to panelists
- Slides available for download during the session 
- Please complete the poll at the end of the session (not required)

What is one goal for your
firm in 2026?

- 01 2025 Trends and Defining Goals
- 02 Change Management Techniques
- 03 Turning Inspiration into Action
- 04 Sustaining Success
- 05 Resources and Questions



Our
Tenth
Annual Edition

Legal Trends Report Data Sources

Tens of thousands of Clio-using law firms
contribute to the Legal Trends Report

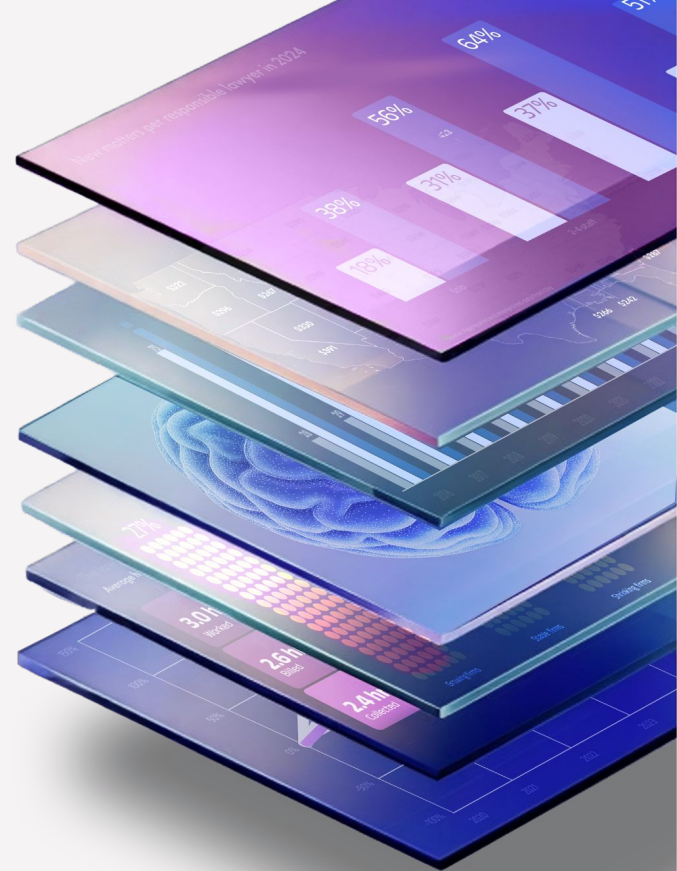
Clio data

Cohort analysis

Interviews and diary study of legal professionals

Legal professional and consumer surveys

NEW! Neurological scanning



Key Legal Trends Shaping How Teams Work

Legal Trends Report

Published by Clio

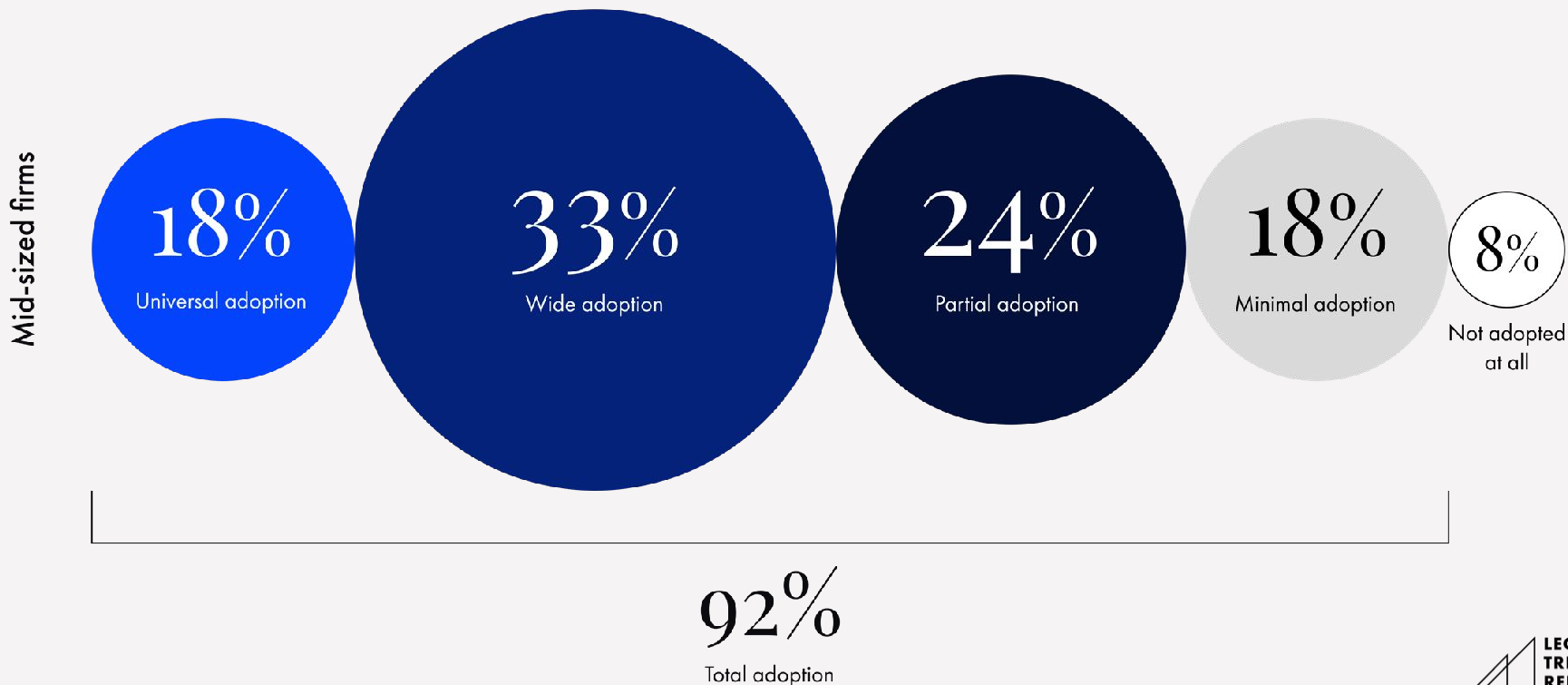


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01 - 2025 Trends: Artificial Intelligence in Legal

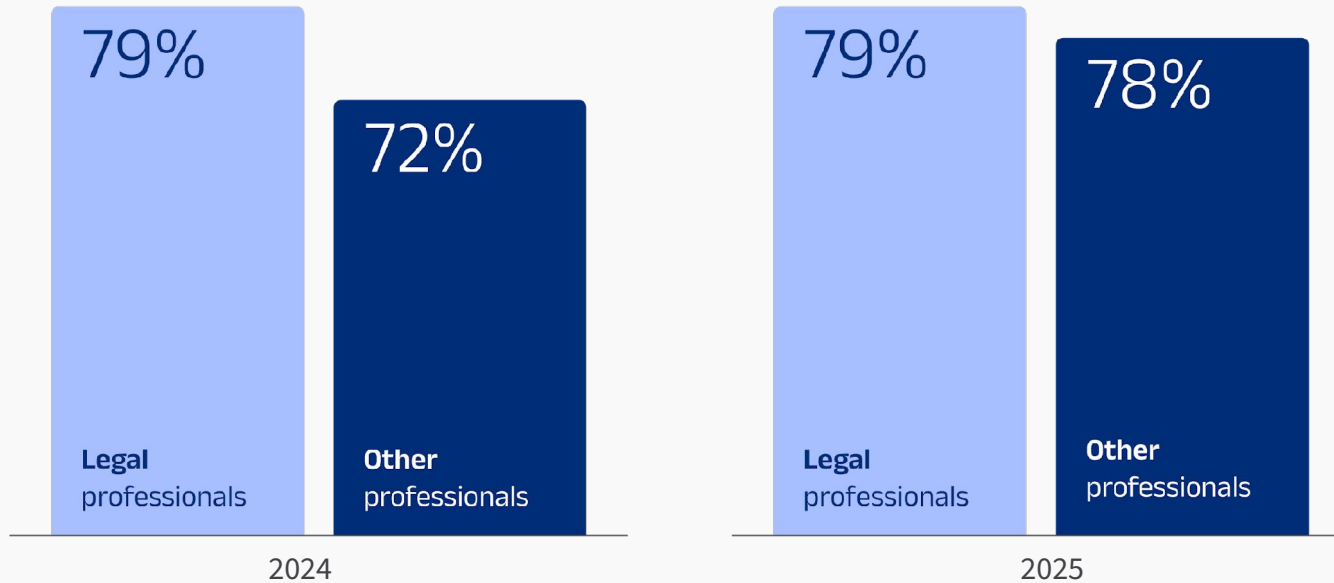
Nearly all mid-sized law firms have adopted AI in some capacity

% of lawyers that have adopted AI in some capacity



AI adoption remains high among legal professionals

Use of AI



Growing law firms are quickest to adopt AI

More growing firms
use AI in Clio

+113%

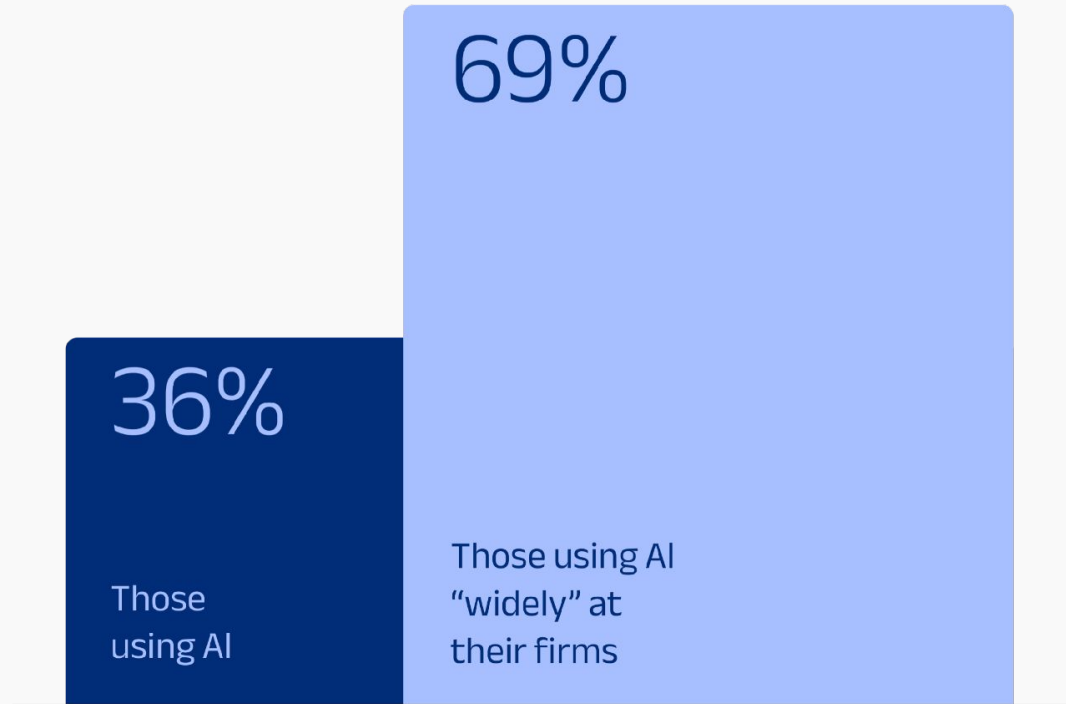
more than **stable firms**, and

+96%

more than **shrinking firms**

Wider adoption of AI leads to greater revenue

Revenue increases
among AI adopters

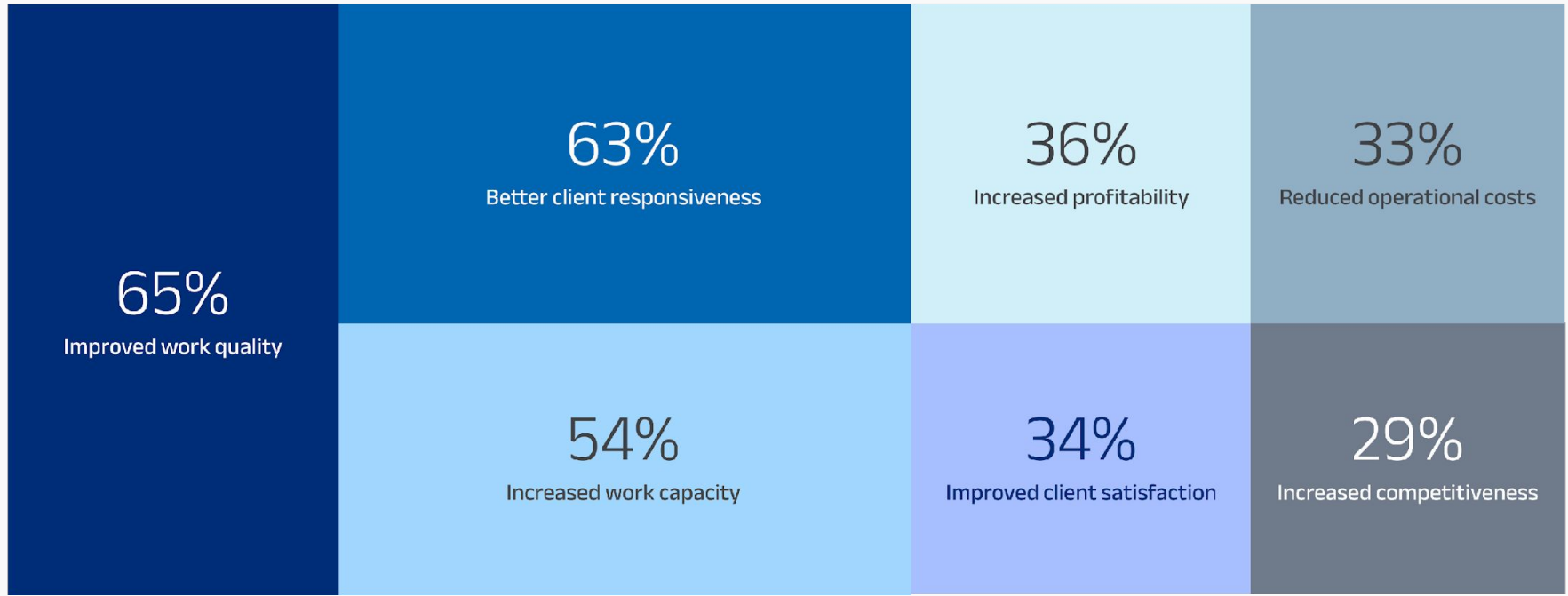


How has your firm
implemented AI this year?

What benefits from AI are law firms seeing now?



What benefits from AI are law firms seeing now?



01 - 2025 Trends: Optimized Client Experience

60%

of law firms didn't
respond to emails

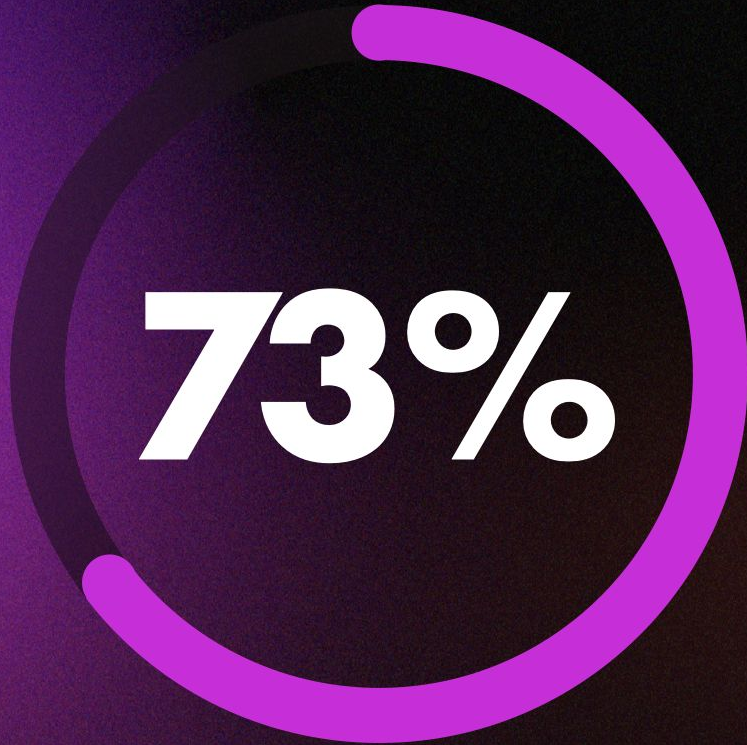
Only 28% of firms provided clear next steps

56%

of law firms
answered calls

Only 7% of phone calls rated as excellent client service*

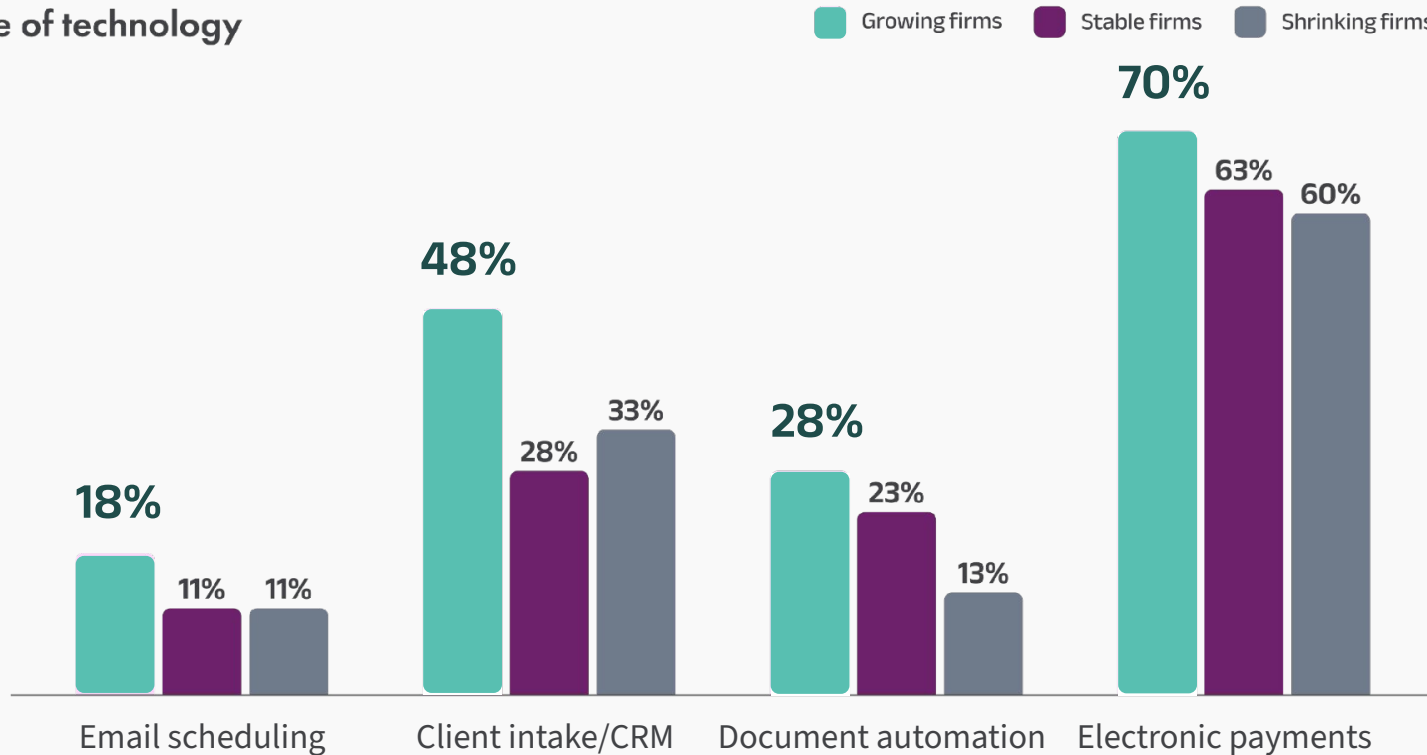
**Based on data from the 2019 Legal Trends Report*



of our 2024 shoppers were unlikely to recommend the law firms with whom they communicated

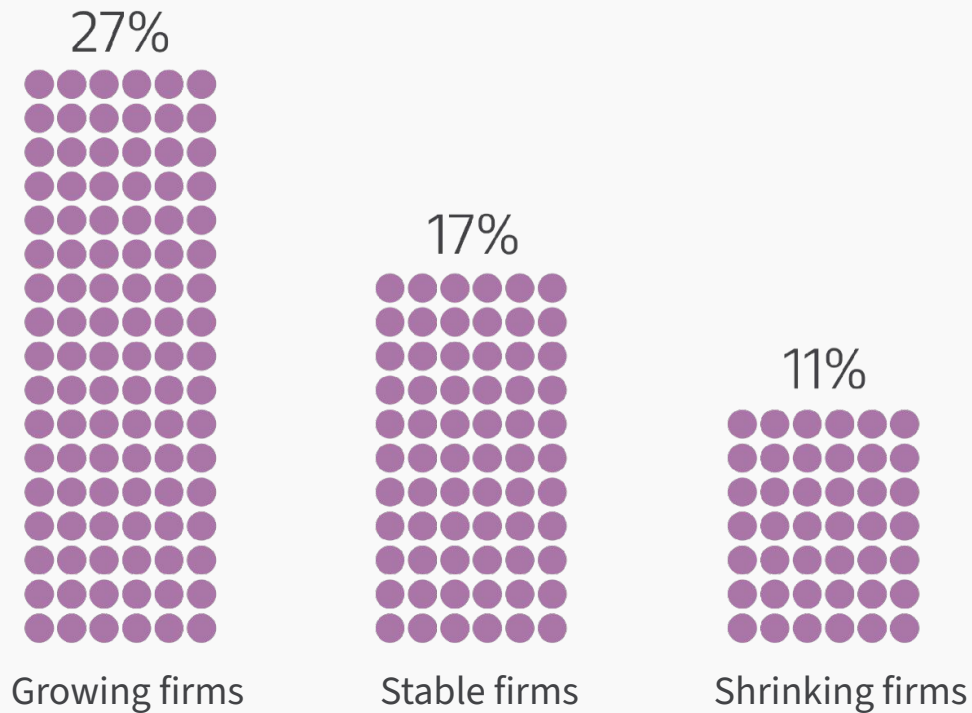
Growing Law Firms Focus on Client Experience Technology

Use of technology



Growing Law Firms Focus on Client Experience Technology

% considering client experience when purchasing new technology



02

01 - 2025 Trends Law Firm Metrics

Law Firm

Key Performance Indicators



2025 Forecast

Utilization rate

$$\text{Number of billable hours worked} \div \text{Number of hours in a day} = \mathbf{38\%}$$

Realization rate

$$\text{Number of billable hours invoiced} \div \text{Number of billable hours worked} = \mathbf{88\%}$$

Collection rate

$$\text{Number of hours collected upon} \div \text{Number of billable hours invoiced} = \mathbf{93\%}$$

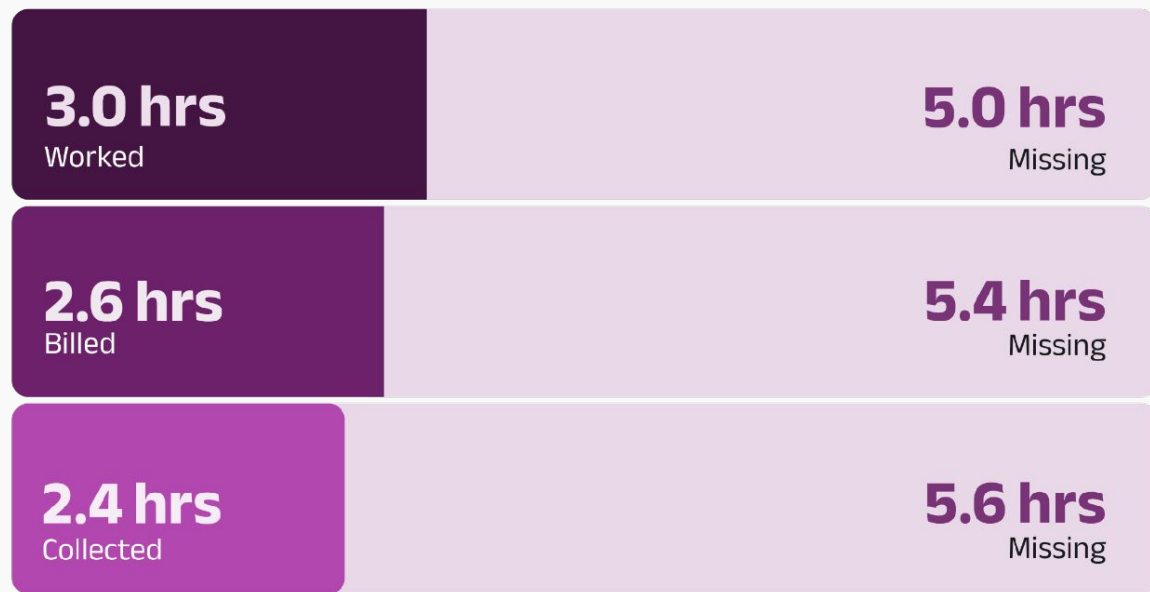
The lawyer's funnel (2016)

Average hours worked, billed and collected



The lawyer's funnel (2025)

Average hours worked, billed and collected



38%
Utilization

88%
Realization

93%
Collection

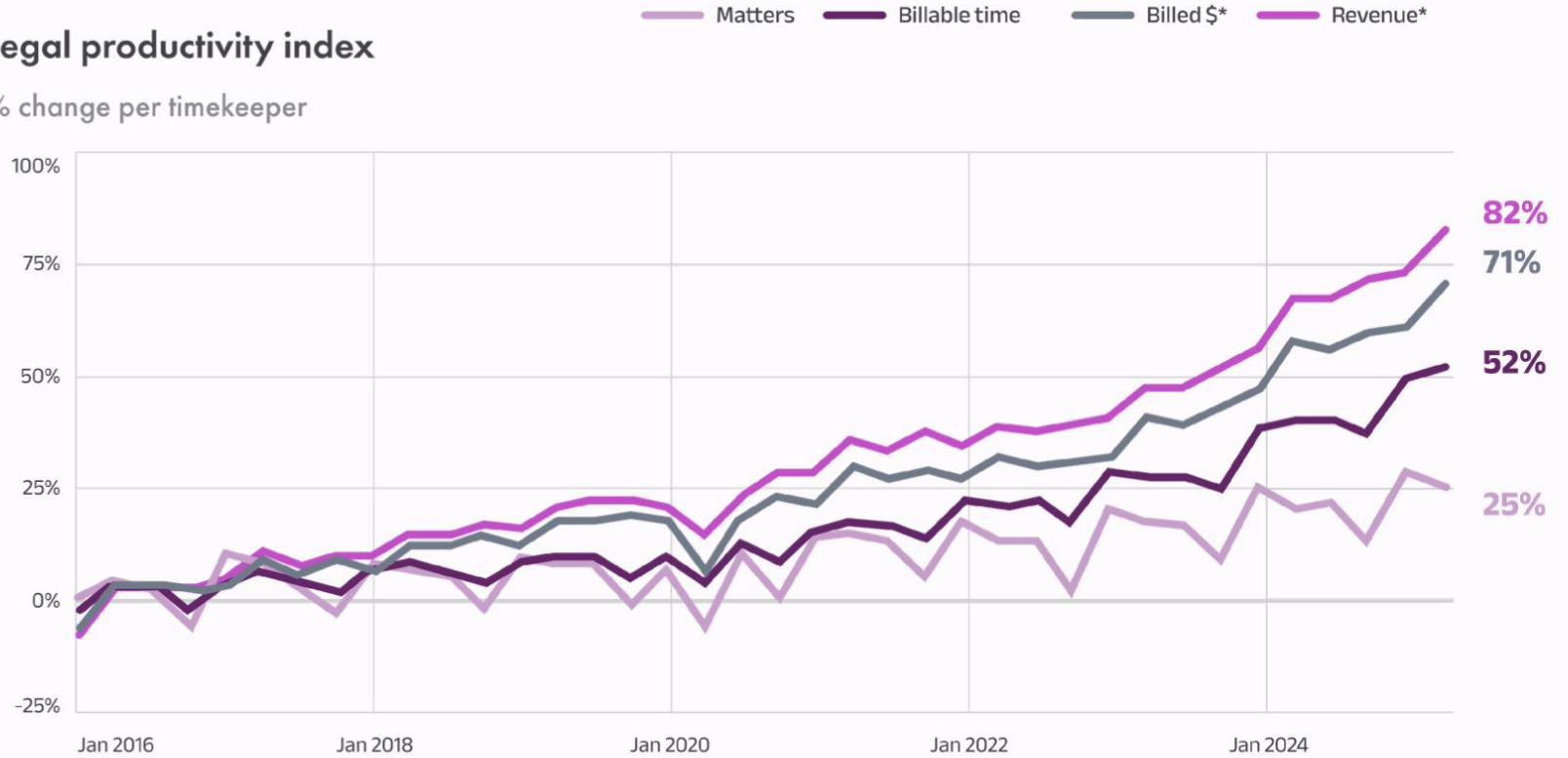
8 hour work day

Legal Productivity Index



Legal productivity index

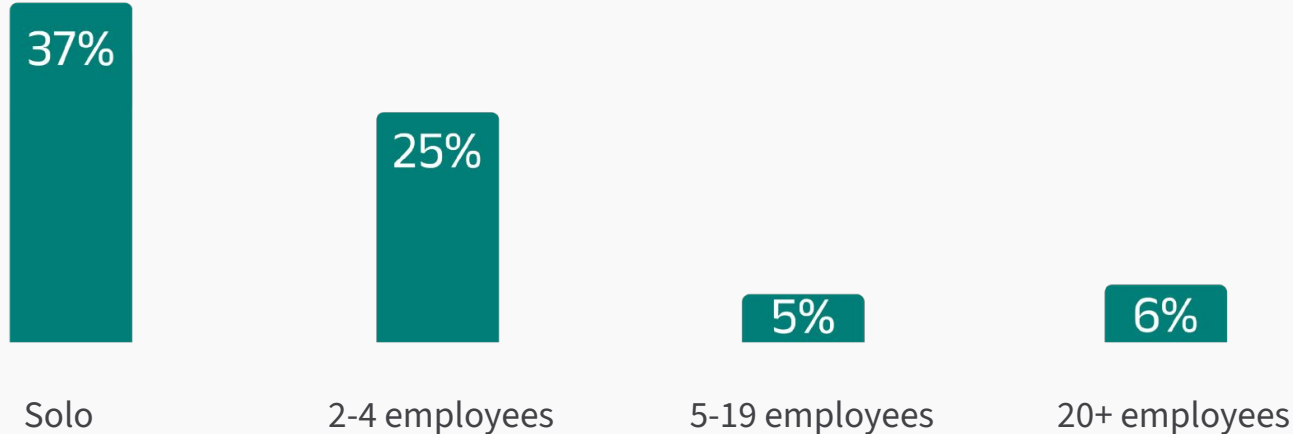
% change per timekeeper



*Adjusted for changes in hourly rates

Responsible lawyers in growing law firms take on more cases

Growing law firms vs full data set: Difference in new matters per responsible lawyer in 2024



Larger law firms grow headcount rather than caseload

Growing law firms vs full data set: Difference in new matters per responsible lawyer in 2024



■ Mean average

5%

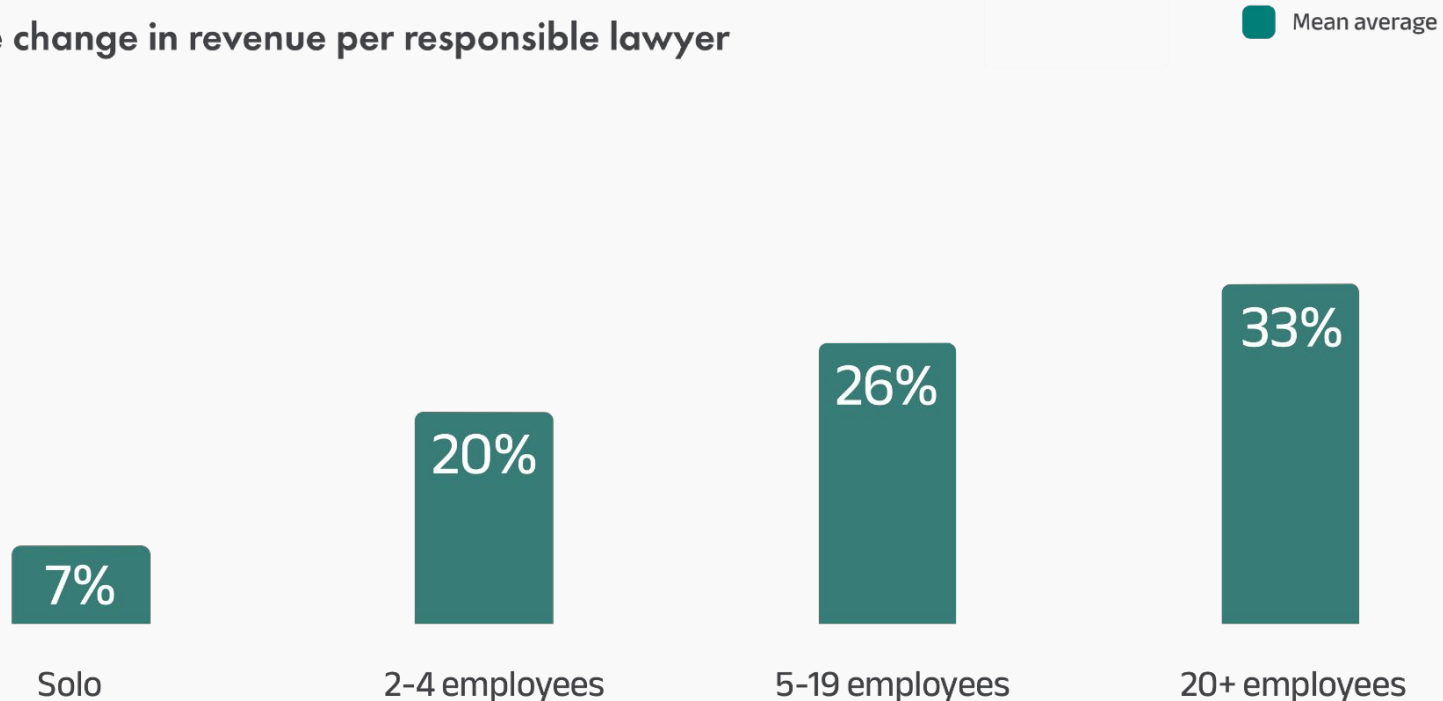
5-19 employees

6%

20+ employees

Mid-sized law firms see the most gains in revenue per responsible lawyer

Percentage change in revenue per responsible lawyer
2016-2023



TAKEAWAY

**Successful law firms
sustain growth
by increasing the
impact of their people**

Law Firm Lockup



Median Realization Lockup

43 days

Median Collection Lockup

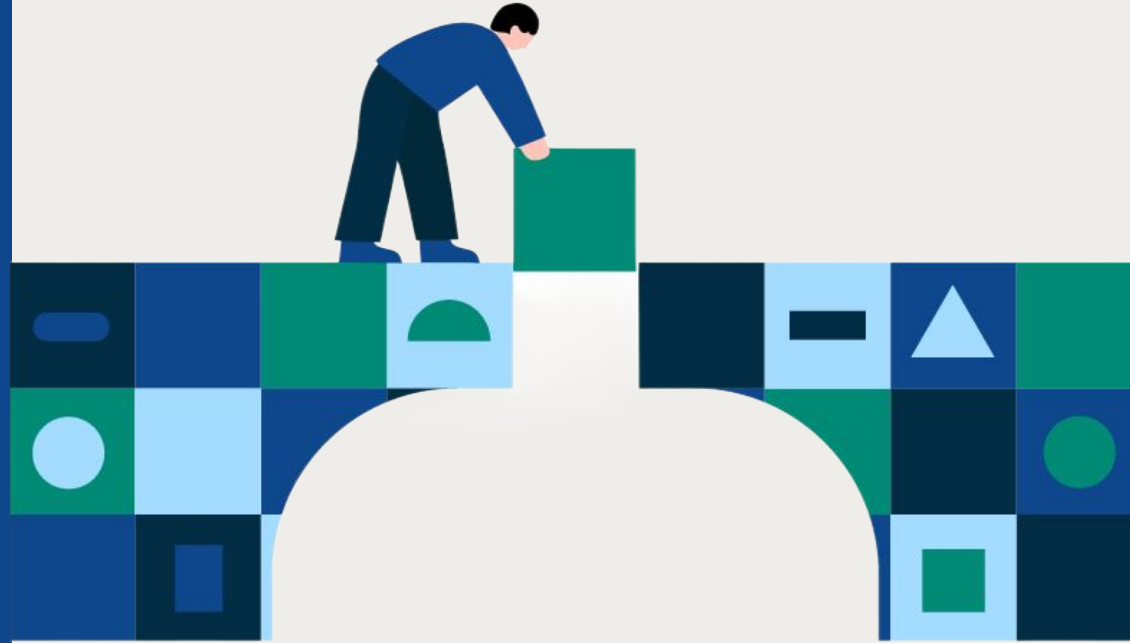
32 days

Median Total Lockup

93 days

Bridging the Gap from Inspiration to Action

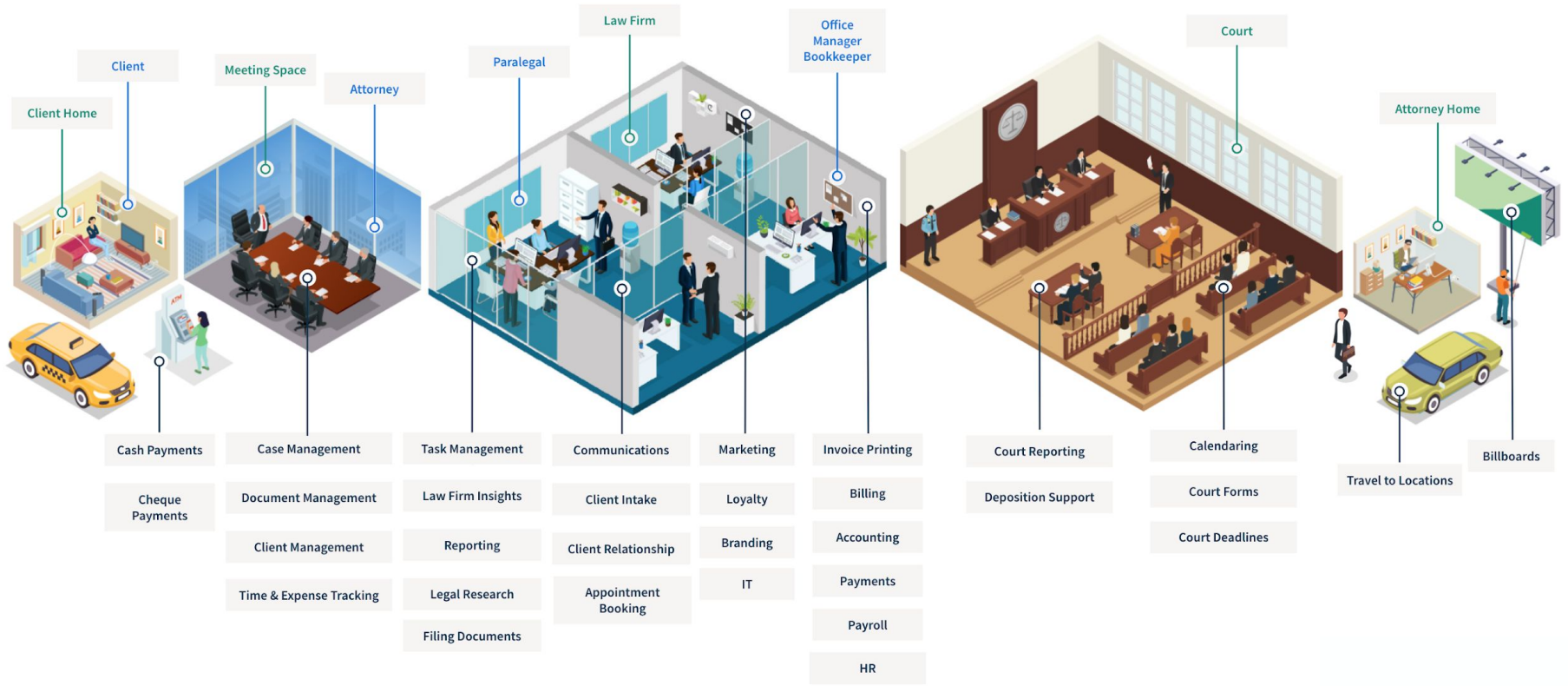
- Competing priorities
- Firm resistance
- Lack of a clear plan



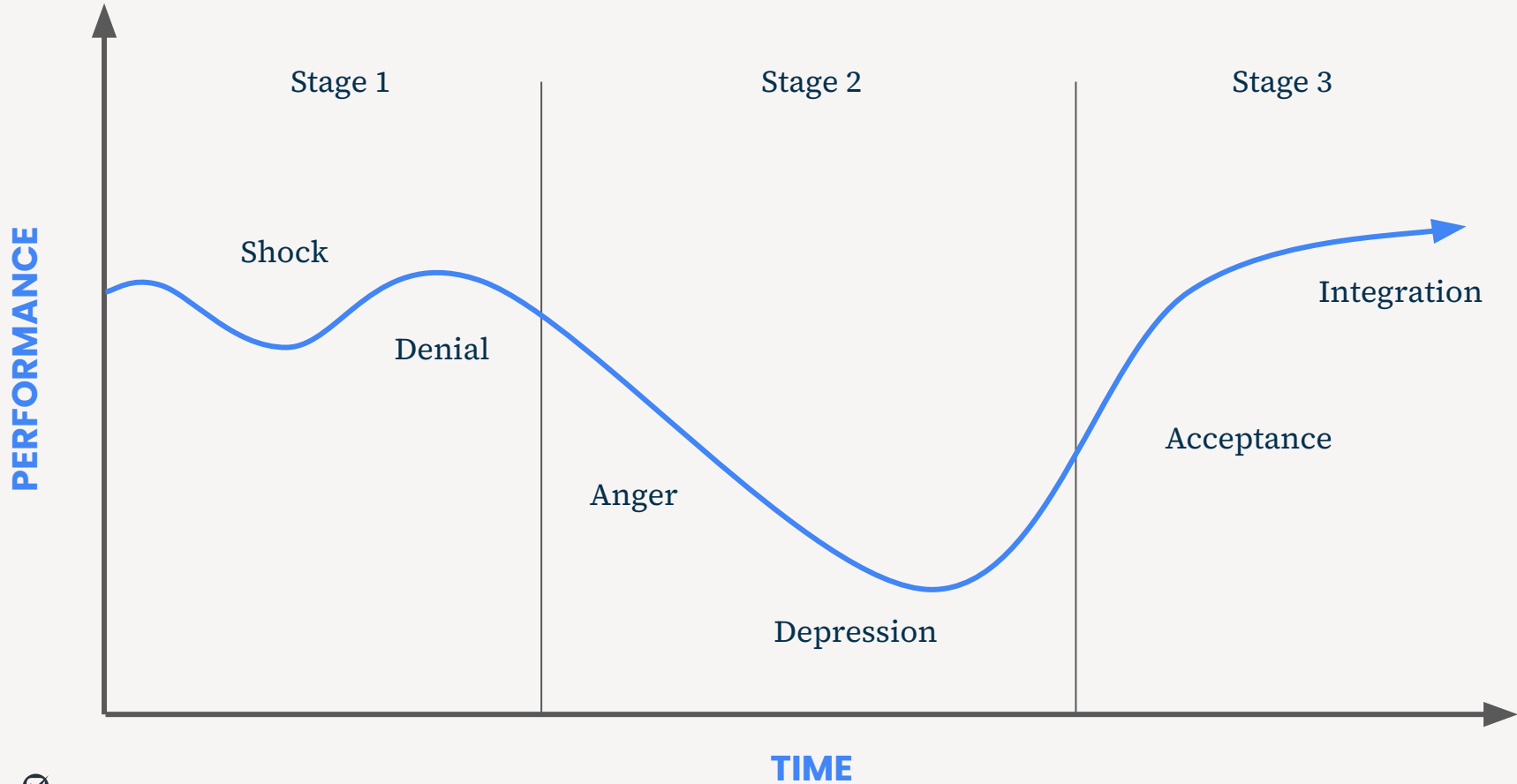
How does change feel to
you?

Why Change Feels So Hard

Change = Loss of control



The Change Curve

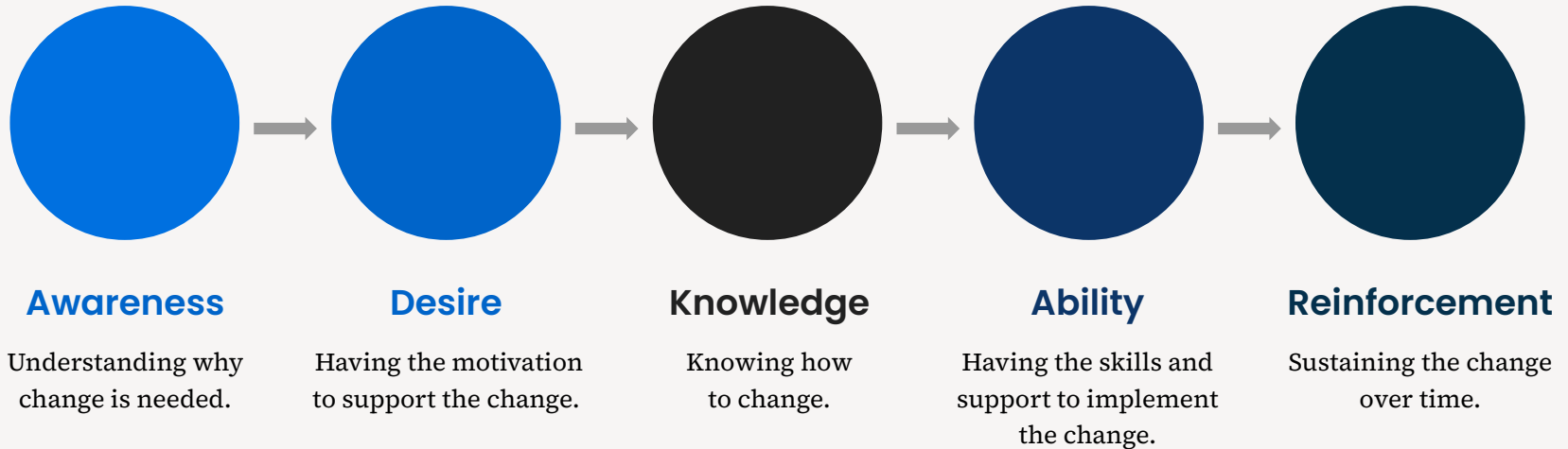


Change Management



What is Change Management

The ADKAR Model



When Change Fails



What is one goal for your
firm in 2026?

Turning Goals into Action

- Engage early and often
- Communicate with intention
- Create “quick wins”
- Use tech the right way
- Measure what matters
- Framework for action



Involve the Right People Early

- Identify champions across departments
- Involve end users in planning and feedback
- Tools for gathering feedback and getting buy-in



Over-Communicate— With Purpose

- Tailor your message: leadership vs. staff
- Answer the unspoken question: “What’s in it for me?”
- Use multiple formats: emails, demos, huddles, one-pagers



Small Wins Build Big Momentum

- Launch something simple that demonstrates value
- Publicize success stories internally
- Use positive peer pressure



Tech Is the Tool — Not the Solution

- Address fear around AI, automation, tech
- Provide training and real-world examples
- Allow time for questions and practice

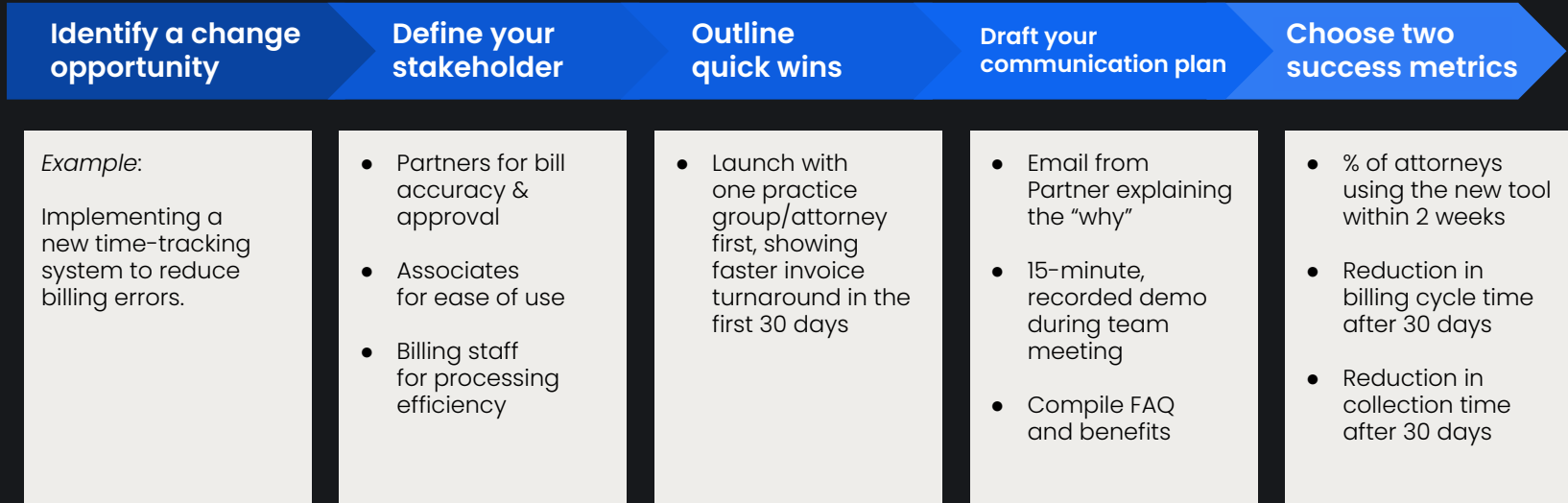
Track Impact, Not Just Activity

- Sample metrics:
 - % tool adoption
 - Time saved
 - Staff satisfaction
- Build feedback loops (surveys, debriefs, check-ins)
- Revisit results quarterly



Framework for Action

Take This Back to Your Firm



"Change cannot be put on people. The best way to instill change is to do it with them.
Create it with them."

—LISA BODELL

When Change Prevails

- Culture of Feedback
- Strong Leadership
- Building Trust
- Starting Small
- Bring in the Perspective of Resistance
- Be Creative and Open-Minded



“Our clients and our team members are less burnt out. We can support one another. We’ve reduced our working hours and we haven’t missed a beat because Clio’s made us more efficient and productive.”

Angela Lennon
—Partner at Koenig|Dunne





**Don't wait for buy-in—
build it.**

Final Resources and Questions



Download the report today





Guide to Change Management

**Scan to
Explore**



Clio is the operating system for law firms



Clio Offerings



Clio Manage

Legal practice management software

Run your firm, organize cases, and collaborate with clients all from one AI-powered place.



Clio Grow

Client intake and legal CRM software

Simplify client intake and firm marketing with online intake forms, automated communications, email campaigns, and more.



Clio Work

Context-aware AI

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Advanced document automation

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- No, thank you



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Thank you!

