EXECUTIVE PAPER 2026

Your AI strategy is probably backwards

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An Executive Paper on AI, legal platforms and the future of legal work

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About the authors.

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Is a recognised leader in legal technology strategy and organisational transformation. With more than two decades of international experience across law firms and corporate legal departments, he focuses on how technology reshapes legal service delivery, operating models, and competitive advantage.

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brings deep expertise in enterprise platforms, governance, and information architecture, shaped by nearly two decades at Microsoft working with organisations worldwide. His perspective focuses on building secure foundations that enable innovation at scale without increasing risk.

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Specialises in artificial intelligence, workflow orchestration, and the practical implementation of emerging technologies within legal environments. His work focuses on turning AI from experimentation into operational capability, particularly within Microsoft ecosystems.

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Introduction
The illusion of progress

Over the past two years, the legal sector has moved through what can only be described as a phase of technological fascination. Demonstrations were impressive, pilot projects generated curiosity, and conferences were dominated by conversations about prompts, models, and the future of legal work.

Many firms experimented enthusiastically, yet a surprising number quietly returned to familiar routines once the initial excitement faded. The narrative often suggested that the technology was not yet mature enough. In reality, the opposite is closer to the truth.

Artificial Intelligence (AI) is maturing rapidly. What has not matured at the same pace is the environment in which legal organisations attempt to use it. Most law firms and corporate legal departments do not suffer from an AI capability problem. They suffer from a structural readiness problem. Systems remain fragmented, knowledge is inconsistently organised, governance frameworks are incomplete, and workflows still depend heavily on individual effort rather than institutional design. Under those conditions, even the most advanced AI produces inconsistent value. Professionals experience impressive outputs one moment and unreliable results the next, which erodes trust and slows adoption.

> *"AI is there. It's no longer about experimenting. It must become part of the firm's infrastructure."*
>
> *– Marcel Lang*

Once something becomes infrastructure, it ceases to be optional. Infrastructure receives budgets, governance, leadership attention, and architectural decisions. The conversation moves from curiosity to capability.

The organisations that recognise this shift early will gain a structural advantage. Those who continue treating AI as a collection of tools will struggle to move beyond isolated efficiency gains. The difference between the two groups will not be determined by which model they use, but by how well their environments are prepared to support intelligent workflows.

The real competitive advantage: Context, not Capability

A persistent misconception in the legal technology market is that competitive advantage comes from selecting the right AI tool. Vendors compete on drafting quality, summarisation accuracy, and model performance, creating the impression that the choice of engine determines success. In practice, the differences between leading models are narrowing quickly. Once a baseline level of competence is reached, marginal improvements in language generation matter far less than the environment in which that generation occurs.

"AI needs a home base."

– Bart Bogaerts

The differentiator is context.

Every legal organisation possesses unique institutional knowledge that has been developed over years or decades of work. This includes negotiation patterns, precedent documents, internal risk positions, matter histories, correspondence, and decision-making approaches shaped by experience. This internal knowledge is the only layer of AI value competitors cannot replicate. External legal information is widely accessible, and AI models themselves are becoming commoditised. Internal context remains the only defensible advantage.

That context lives primarily within document and knowledge environments. For years, those environments were viewed as necessary infrastructure rather than strategic assets. Artificial intelligence is reversing that perception. Bart Bogaerts often emphasises a simple but powerful principle: "AI needs a home base."

Without a secure and structured home base, AI remains superficial. With it, AI becomes transformative. Organisations that invest in their knowledge foundations gain compounding benefits over time because every improvement strengthens future outputs.

From storage to intelligence:

The strategic return of the DMS

The document management system is undergoing a profound evolution. Historically, its role was to store and retrieve files. Today, it is becoming the platform where intelligence, workflows, and governance converge. This shift is not driven by technology alone but by changing expectations about how legal work should function. Several structural trends are accelerating this transformation.

- First, AI is moving from experimentation to operational deployment. Organisations are shifting from pilot budgets to infrastructure investments. Decisions about data location, integration architecture, and governance maturity are replacing questions about which tool to test next.

- Second, the legal sector relies heavily on what can be described as “sticky systems”, These are platforms that cannot easily be replaced because they hold institutional memory. Finance systems, case management solutions, and document management platforms fall into this category. Replacing them involves migration risks, adoption challenges, and operational disruption. When AI becomes infrastructure, it naturally embeds itself within these environments rather than alongside them.

- Third, user expectations are changing fundamentally. Legal professionals increasingly want guidance rather than search results. Instead of manually locating documents, they expect systems to surface relevant knowledge, highlight risks, and provide structured starting points grounded in prior work. Achieving this requires semantic understanding, consistent data structures, and integrated workflows.

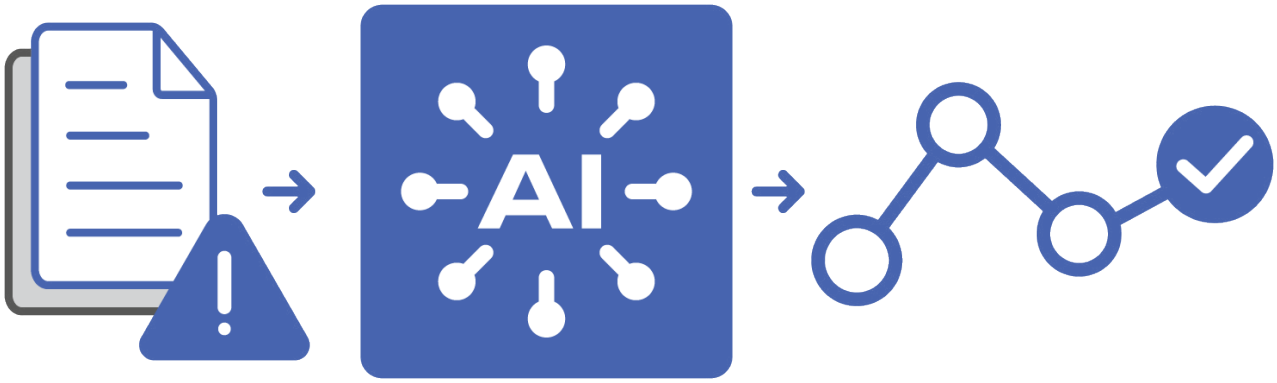
Finally, integration is replacing fragmentation. AI that operates outside daily workflows rarely scales. Lawyers do not want additional tools to manage; they want intelligence embedded where work already happens. That means; within email, documents, collaboration environments, and matter workspaces. The closer AI sits to existing workflows, the higher adoption becomes. These developments collectively transform the DMS into a legal intelligence layer rather than a storage repository.

Data quality:
The uncomfortable reality behind every AI initiative

No AI initiative can succeed without addressing data quality. Legal organisations often underestimate how inconsistent metadata, unclear permissions, and unstructured storage undermine AI performance. The principle is straightforward: artificial intelligence amplifies the quality of its inputs. When data is structured and contextualised, outputs improve dramatically. When it is chaotic, AI produces unreliable or even risky results. This is not a limitation of the technology; it is a reflection of the environment.

Modern legal platforms increasingly address this through automation and governance capabilities such as automatic metadata extraction, intelligent classification, contextual search, and workflow integration. These capabilities reduce manual effort while improving consistency, making it easier for professionals to adopt new systems without additional administrative burden.

The impact is not limited to efficiency. Better data quality directly reduces risk exposure. When permissions are clear and information is properly classified, organisations gain confidence in how AI interacts with sensitive material.



From prompts to agents:

Structuring legal workflows

The early phase of AI adoption focused heavily on prompting. Professionals experimented with instructions, refined wording, and evaluated outputs. While necessary, this phase represents only the first stage of maturity. Legal work is rarely a single-step activity. It involves layered processes such as analysing information, consulting precedent, applying policies, drafting responses, and validating against risk criteria.

> *"Prompting was just the first step. Real value comes when workflows become structured and repeatable."*
>
> *– Bart van Wanroij*

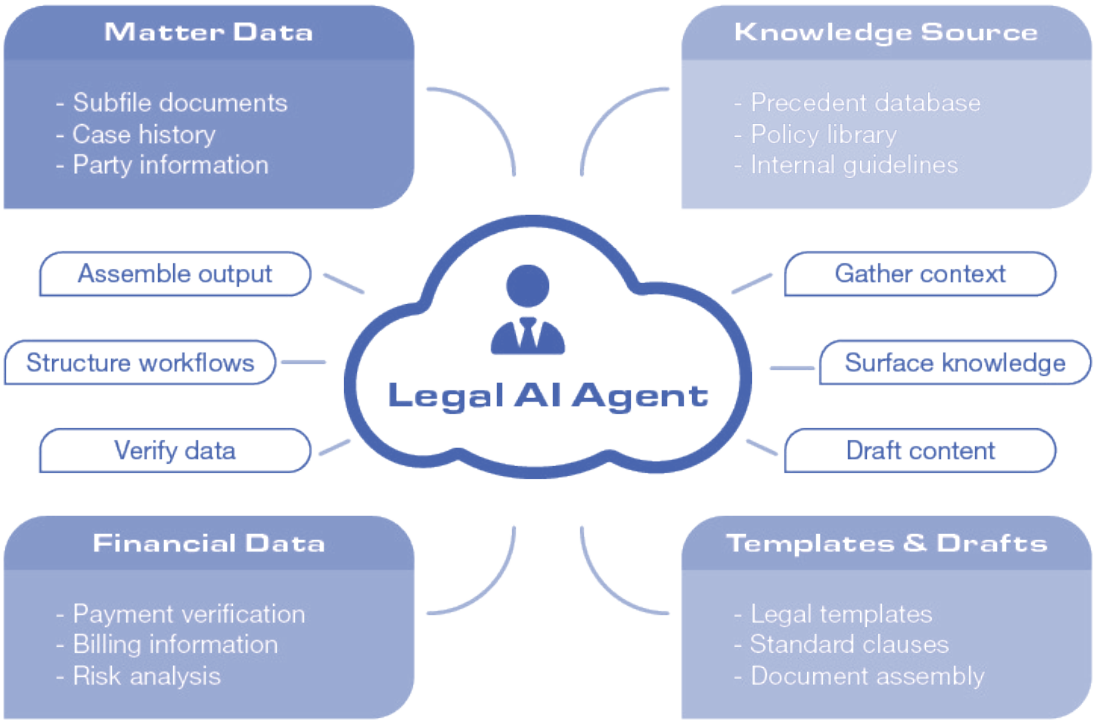
Agents represent the next stage of AI maturity. They encode workflows into structured pipelines, allowing systems to gather context, apply standards, and generate outputs more consistently. Instead of starting from scratch each time, AI follows predefined steps shaped by organisational knowledge and senior expertise.

Consider a typical scenario in a corporate legal department: a dispute arrives, the team reviews contracts, checks prior cases, evaluates risk exposure, and prepares a response. Traditionally, professionals navigate multiple systems manually before producing a draft. An agent can orchestrate those preparatory steps automatically, assembling relevant context and creating a structured starting point. The lawyer then focuses on judgement rather than information gathering.

This shift introduces consistency across teams. Senior expertise becomes embedded within processes rather than remaining dependent on individuals. Junior professionals start from stronger foundations, and overall output quality rises.

AI-Enabled Legal Workflows

Legal AI Agents are intelligent systems that **coordinate structured workflows** across your connected environment.



The next frontier:
Orchestration across systems

Beyond agents lies an even more significant development: orchestration. As AI matures, the focus shifts from generating content to coordinating work across multiple systems and data sources. Legal workflows rarely occur within a single platform. They involve document repositories, knowledge bases, financial data, and matter environments.

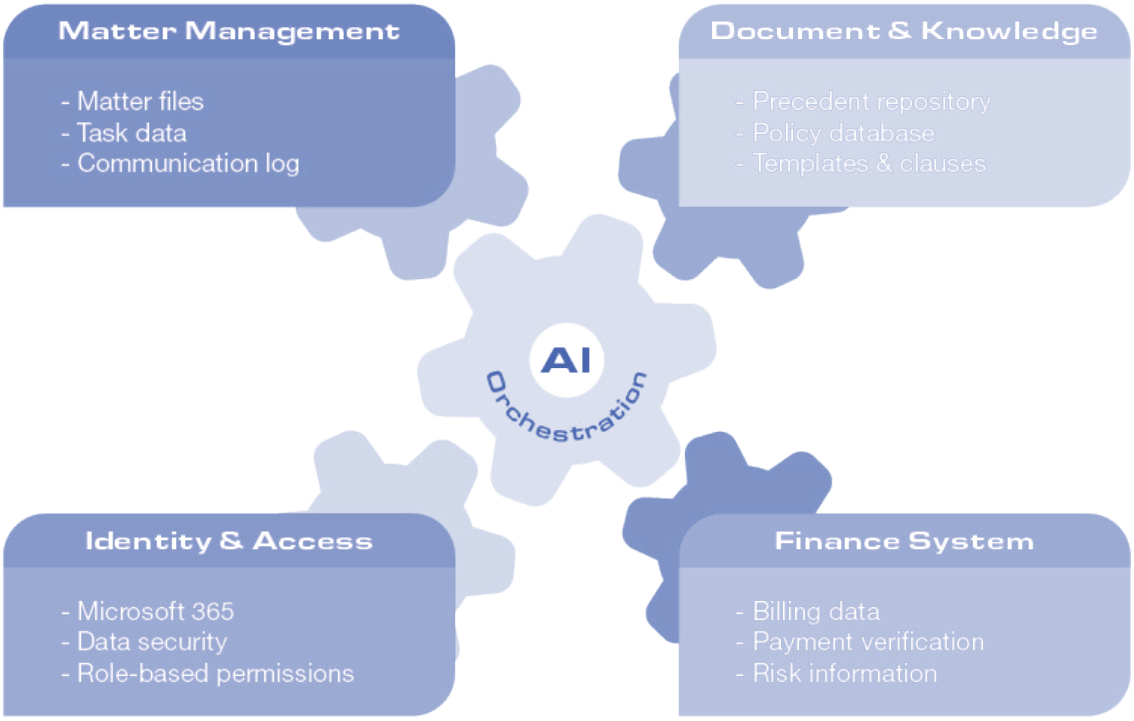
Traditionally, professionals navigate these environments manually, stitching together context before producing output. Orchestrated AI changes that dynamic. Systems begin interacting through structured processes, allowing AI to retrieve information, validate data, and prepare outputs across environments before human intervention. The lawyer enters the process later, focusing on analysis and decision-making.

This evolution introduces new strategic requirements. Traceability becomes essential. Organisations must understand how outputs were generated, which sources were consulted, and what assumptions were applied. Document platforms are therefore evolving into provenance engines that capture relationships between inputs, workflows, and outcomes. Transparency strengthens defensibility and trust, both critical in legal environments.

Architecture becomes the defining factor. Organisations that design coherent ecosystems where systems communicate effectively will outperform those relying on disconnected tools.

AI Orchestration

System **Intelligence** coordinates AI workflows across your legal ecosystem.



Security and governance:

From technical detail to strategic priority

As AI capabilities expand, awareness of associated risk grows. Legal organisations operate under strict confidentiality and regulatory obligations. A seemingly simple action, such as uploading a sensitive document into an uncontrolled environment, can create significant exposure. Consequently, security and governance are becoming primary decision criteria rather than secondary considerations.

Platforms integrated within environments such as Microsoft 365 offer advantages because identity management, permissions, retention policies, and compliance controls are embedded within the same ecosystem where content resides. AI can access information while respecting the same boundaries that govern human users.

> *"Without governance and architecture, AI amplifies risk instead of reducing it."*
>
> *– Bart Bogaerts*

Security is not merely an IT concern. It is a core legal responsibility. Organisations that treat governance as foundational rather than optional will move faster with greater confidence.

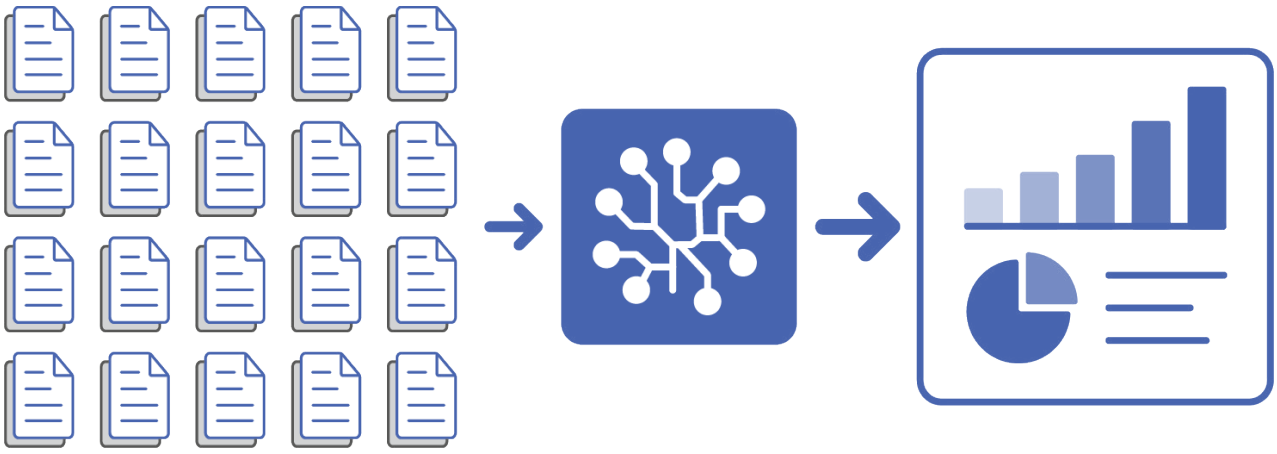
The Legal Operating System

An integrated and secure platform where knowledge, processes and governance converge.

Knowledge management
finally becomes operational

For decades, knowledge management was recognised as important yet difficult to implement effectively. The challenge was never the absence of documents but the inability to extract usable insights at scale. Artificial intelligence changes that equation by enabling semantic reasoning across large content repositories.

Lawyers can ask questions grounded in prior matters, identify patterns, and reuse knowledge without extensive manual curation. Knowledge management shifts from aspiration to operational capability. Institutional intelligence becomes accessible, reducing duplication and accelerating delivery.



Practical direction for legal leaders

The transition toward AI-enabled legal environments requires deliberate action. Leaders should focus on several priorities.

- Treat AI as infrastructure rather than experimentation.
- Establish governance frameworks, approved use cases, and training programmes aligned with organisational objectives.
- Focus on integration rather than tool acquisition. Systems should work together seamlessly, sharing context and permissions.
- Invest in data foundations. Metadata consistency, matter structures, and access models directly influence AI performance.
- Prepare for agent-driven workflows by identifying repetitive processes suitable for automation while maintaining human oversight.
- Encourage collaboration between generations. Technical fluency and legal expertise must combine to build scalable solutions.

These steps move organisations from curiosity toward capability.

Readiness checklist

Evaluate your organisation across the following areas:

Foundation

- [ ] Structured document environment
- [ ] Reliable metadata
- [ ] Clear permissions

Governance

- [ ] AI policies and controls
- [ ] Secure data boundaries
- [ ] Compliance and auditability

Integration

- [ ] AI embedded in workflows
- [ ] Systems connected across environments

Strategy

- [ ] Leadership alignment
- [ ] Exploration of agents and orchestration

Knowledge

- [ ] Reusable prior work
- [ ] Operational knowledge management

Conclusion:
The organisations that will lead

The legal sector is entering a period where technological advantage depends less on innovation itself and more on implementation maturity. Artificial intelligence will continue advancing rapidly, but competitive differentiation will arise from environments where intelligence, context, and governance reinforce each other.

The organisations that succeed will not be those deploying the most tools. They will be those building coherent ecosystems: secure, integrated, workflow-driven, and knowledge-enabled.

"The firms that win won't be the ones with the most AI tools. They'll be the ones with the smartest foundations."

– Marcel Lang

Your AI strategy is not defined by what you buy. It is defined by what you build.