

2026 Legal Tech Trends

Helping You Make the Most of Every Moment



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Letter from the CEO



This year's trends report arrives at an important moment for our industry. The rapid rise of AI has pushed legal teams across law firms, corporate legal departments, and government agencies to rethink how work gets done – not only what AI can do, but how it should be applied, governed, and adopted. Amid that change, one principle has guided our decisions at NetDocuments: **the DMS must now function as the strategic core of modern legal operations.**

For years, document management focused on storing and organizing information. Today, it must do much more. It must **activate your knowledge, support intelligent workflows, and serve as the secure environment where AI can work reliably and responsibly.** That shift is well underway, and we are investing heavily to ensure the NetDocuments platform provides the intelligence, extensibility, and governance that legal teams require.

Our focus is not on adding complexity – it's on reducing it. We believe **AI should support professionals inside the tools and workflows they already use**, not force them to learn new interfaces or juggle a growing collection of point solutions. This is why we continue to embed ambient intelligence directly into the platform, and why we built ndConnect: to give organizations access to secure, specialized Legal AI solutions while keeping NetDocuments as the trusted backbone where work, permissions, and security remain consistent.

But as many teams experienced over the last year, **technology alone doesn't drive impact – adoption does.** We are equally committed to helping customers build the readiness, structure, and change management capabilities needed to benefit from AI in meaningful ways. Our mission has always been to help legal professionals do their best work. Today, that means supporting not only the technology behind that work, but the human and operational practices that bring it to life.

In the pages that follow, you'll see six trends shaping the next phase of legal innovation. The "In Practice" examples within each one highlight what's possible right now – from intelligent assistants and connected workflows to agentic AI and self-organizing knowledge. My hope is that they **spark ideas for how your firm, department, or agency can build on what's working today and prepare for what's next.**

Thank you for your continued trust and partnership. Together, we are shaping the future of legal work with purpose, responsibility, and innovation at the core and helping legal professionals make the most of every moment.

Sincerely,

A handwritten signature in black ink, appearing to read "Josh Baxter". The signature is fluid and cursive, written over a light blue background.

Josh Baxter
Chief Executive Officer
NetDocuments

**AI should support
professionals inside the
tools and workflows
they already use.**

– Josh Baxter, CEO, NetDocuments



Introduction

The past year has been a turning point for legal teams. Legal AI adoption has surged – use by corporate legal teams' organizations is [up to 60%](#), and law firms jumped from 37% in 2024 to [80% in 2025](#), with usage among 700-lawyer-plus firms now at 100%. In 2025, firms, legal departments, and public-sector organizations experimented, piloted, and pressure-tested a wave of new AI tools. Some delivered real value; others revealed the gap between promise and practicality. What emerged from that learning is a clearer understanding of what it will take to move from experimentation to meaningful, sustainable impact.

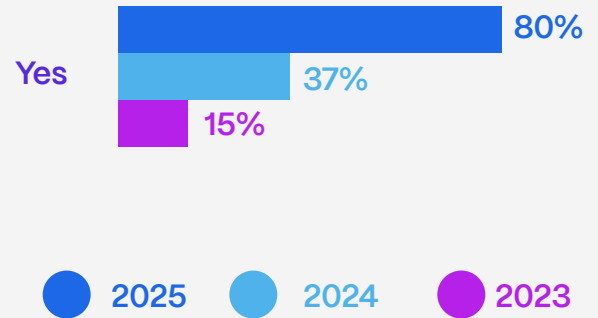
In 2026, we begin to see a more grounded vision take shape: **AI that becomes part of the workflow, not another place to click.** Ambient intelligence that supports work as it happens. A DMS that shifts from a passive system of record to the foundation of an organization's **future legal operating system** – where content, workflow, and AI come together to make both work and life better.

This evolution won't happen overnight. It requires **thoughtful change management, better-structured knowledge, secure integrations, and tools that meet professionals exactly where they work.** But the direction is clear. As organizations adopt more disciplined, workflow-ready AI – instead of chasing hype or standalone tools, the benefits compound: faster insight, smoother collaboration, fewer manual tasks, and more time for the work that depends on human judgment.

The result isn't just efficiency. It's balance. It's the ability for lawyers and other legal professionals to make the most of every moment with powerful legal tech.

Here are **six key legal tech trends** that will redefine what it means to work – and thrive – in 2026. Each one shows how technology can be more than a tool; it can be **a partner that gives time, clarity, and purpose back to the people driving the future of the profession** – whether in a law firm, corporate legal department, or government agency.

Is your firm using generative AI tools for business tasks?



[ILTA 2025 Tech Survey](#)

"We're going to see – and we have seen – ambient AI become ubiquitous. It's going to seep into everything in ways that are largely undetectable but have a profound impact on what we see and ultimately what we do."

– Casey Flaherty, B+B Partner and LexFusion Co-Founder

Trends At A Glance

1 The Rise of the Intelligent Assistant

From command-based to conversational – and now to proactive. (page 6)

2 Automation with Intent

Workflows that plan before they act. (page 8)

3 Collaboration Without Boundaries

The future of co-authoring and beyond, securely reimaged. (page 10)

4 Search Becomes Understanding

AI search replaces keyword chaos with contextual intelligence. (page 12)

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Everything talks – securely and seamlessly. (page 14)

6 Knowledge That Organizes Itself

AI profiling turns documents into structured intelligence – automatically. (page 16)

1 The Rise of the Intelligent Assistant

From command-based to conversational — and now to proactive.

2026 marks a new horizon: the shift from reactive tools to **proactive intelligence** — where **background AI**, **smart answers** based on your semantically indexed knowledge and documents, and **agentic AI** converge to redefine what it means to complete legal work.

The modern legal professional won't just use AI — they'll collaborate with it. The intelligent assistant becomes an **ever-present digital colleague**, attuned to context and empowered to act. It can offer insights, draft documents, and connect ideas across the workspace in ways that feel intuitive and almost human.

AI that hums quietly in the background — always aware, always aligned — turns your digital environment into a **living network of knowledge**. Smart answers redefine search, ensuring that information is never more than a beat away, **distilling complex data into instant clarity**. And agentic **AI brings autonomy to the forefront**, completing tasks with minimal direction, easily adapting to shifting goals, and transforming tedious tasks into seamless flows across matters, cases, and departmental workflows.

"It's a tool that doesn't just enhance analysis, it fuels creativity. The potential truly expands as far as your imagination can take it."

— Molly Callahan, Certified Paralegal, GableGotwals

WHY IT MATTERS

In this next era, AI won't wait for instructions — it will understand intent, orchestrate knowledge, and accelerate human judgment. The synergy of background, answer-driven, and agentic AI moves legal work from effort to insight, from searching to knowing, from doing to deciding — **freeing professionals to spend more time and cognitive effort on strategy, creativity, and impact for clients, stakeholders, and constituents.**

The Intelligent Assistant in Practice

It's Monday morning at a 700-lawyer firm. A partner opens their DMS to discover the diligence **documents received on Friday have been automatically profiled with key data extracted** — a tailored and searchable summary of key details with key risks flagged and follow-up notes drafted, ready to be assigned to a team member for review.

Before the first meeting, **smart answers surface key negotiation points** or regulatory considerations relevant to the day's discussion. During collaboration with internal or external stakeholders on a newly received contract, agentic AI quietly assists — adjusting clauses and pre-empting inconsistencies.

A team member is able to report on the diligence review in hours versus days. **Every moment, AI works in the background** to ensure context moves with the user — flowing across applications, conversations, and documents without disruption or the need to switch systems.

By evening, the day's labor has evolved into orchestration. **What once took hours of coordination now unfolds through a fluid exchange** between human intent and machine automation — turning time spent managing tasks into time spent applying expertise and advancing client outcomes.



55%

of professionals have experienced significant changes in their day-to-day role in the last 12 months, and

88%

favor having a profession-specific AI assistant.

[Thomson Reuters](#)

"For years, we focused on finding the right document. Now the system can take the next step — pulling the answer from across your knowledge base and helping you act on it immediately. But the best AI is the AI you don't have to think about. With background AI, the system is reasoning, searching, and refining on your behalf before you even ask."

— Dan Hauck, Chief Product Officer, NetDocuments

2 Automation with Intent

Workflows that plan before they act.

Automation is no longer about following instructions

– it's about **understanding and acting on them.**

Traditional automation excelled at repetitive, rule-based tasks, but fell short when faced with nuance, judgment, or change. In a world where few legal workflows are truly linear, static “if-this-then-that” logic has reached its limits – unless it's combined with AI.

In 2026, automation becomes **intelligent, adaptive, and context-aware** – moving from rigidity to resilience.

Agentic AI and **automated intelligence** enable workflows that **understand intent and interpret patterns** across matters, cases, investigations, and departmental operations. What once required human brain power now evolves, easily handling exceptions, adapting to new data, and refining as priorities shift.

From document profiling to matter setup, reporting, compliance, regulatory response, and internal policy workflows, these systems operate like digital coworkers within the workspace: always improving, always aligned with your purpose and expertise.

“We’ve moved from descriptive analytics to not just predictive analytics, but even prescriptive analytics. What can you do in order to make sure that a certain outcome is achieved?”

– Nikki Shaver, CEO and Co-Founder of Legaltech Hub

WHY IT MATTERS

Work becomes simpler, smarter, and self-evolving. With intelligent automation, lawyers no longer babysit workflows – they orchestrate outcomes. **By reducing friction and repetition, AI gives professionals back the time and clarity to focus on judgment and value creation.**

Legal AI Automation in Practice

It's mid-morning inside a Fortune 500 corporate legal department. A legal team member opens a new investigation matter in the DMS. Instantly, the workspace configures itself – applying templates, assigning metadata, and setting secure permissions – all informed by the organization's policies, practices, and expertise.

As new documents, emails, and incident reports flow in, **automation routes them seamlessly to the right locations, maintaining compliance and consistency without intervention.** The system recognizes business-unit-specific nuances – from naming conventions to reporting preferences – and adapts dynamically.

By afternoon, the cross-functional team (legal, compliance, HR) is reviewing the draft case summary and matter timeline assembled by an agentic process.

What once took hours of manual review and coordination is now an orchestrated flow of adaptive intelligence – a smoother workday that moves the department from managing processes to making meaningful progress on risk, remediation, and reporting to leadership.

60%

of in-house legal teams' organizations are using or developing generative AI tools, with their top goals being

increased efficiency & process automation
(35%) (26%)

Bloomberg Law



3 Collaboration Without Boundaries

The future of co-authoring and beyond, securely reimaged.

As human-AI collaboration accelerates, **the true power of progress lies in amplifying human-to-human collaboration** – frictionless, secure, and woven seamlessly into the flow of work.

In 2026, collaboration transcends platforms, while ensuring permissions are respected. It's no longer something you "do" – it's something that simply happens. Embedded across Microsoft 365 applications like Word, Excel, and PowerPoint, **co-authoring becomes real-time, traceable, and contextual**, supported by intelligent systems that handle everything else invisibly in the background.

M365 integrations ensure that **every change is captured, every version aligned, and every participant operating in sync**, allowing teams to collaborate more effectively across internal stakeholders, external counsel, agencies, and multi-department teams without sacrificing control or compliance.

As things continue to evolve, we envision a world where you might be collaborating between a human and a task-oriented AI agent to accomplish even more – **just with different collaboration partners than before** and across a broader range of legal and operational workflows.

Firms with a clear, well-communicated AI strategy are

3.9x

more likely to experience ROI from AI – because they pair technology adoption with training, communication, and cultural alignment.

[Thomson Reuters](#)

WHY IT MATTERS

With boundaries dissolved and context unified, collaboration becomes a creative continuum – one where teams spend less time reconciling versions and more time generating insight, value, and impact together regardless of whether they are drafting a brief, preparing a regulatory filing, revising a contract, or producing a public record. **The result is more time for meaningful collaboration and less time lost to coordination.**

AI-Powered Collaboration in Practice

It's early afternoon at a state agency preparing a complex regulatory opinion. Inside their NetDocuments workspace, co-authoring in Word is live, secure, and continuous – every edit instantly saved, versioned, and linked to the matter file for the record.

As counsel from different divisions and policy analysts work together, **AI surfaces contextual insights directly in-line** – pointing to prior guidance, related regulations, and comments from earlier rulemakings. When a division head comments in Teams, their feedback is synchronized quickly in the same governed workspace – no email attachments, no confusion, no lag.

Behind the scenes, intelligent systems manage access based on role, maintain version integrity, and record every change with a **complete audit trail suitable for public records and oversight.** Once finalized, the opinion is shared securely with other agencies and prepared for publication – all without breaking the flow.

Collaboration no longer feels like coordination. It feels like cohesion – a frictionless flow of ideas that keeps public-sector teams focused on policy and impact, not document wrangling.

“One of the most exciting things about AI is its potential to enhance collaboration across disciplines, product groups, time zones, and even languages. The benefits of these new agentic capabilities have been transformative.”

- [Nathalie D'Hers, Corporate Vice President, Microsoft Employee Experience](#)

4 Search Becomes Understanding

AI search replaces keyword chaos with contextual intelligence.

The era of keyword guessing is over. In vast document ecosystems, traditional search often leads to noise – endless lists of partial matches that bury insight under irrelevance. But **AI search**, powered by **semantic understanding**, changes everything.

In 2026, search evolves from retrieval to **reasoning**. Instead of matching words, **AI search grasps meaning, context, and intent** – interpreting natural language the way a human expert would. It's like having a highly trained legal researcher who knows not only where every document lives, but how each one connects, what it means, and why it matters.

Ask, “Find the contract between ABC Corp. and XYZ Industries with indemnity clause,” and your workspace doesn't just scan filenames – it understands the meaning of the request, the clause even if it's termed “liability protection” or “compensation for loss,” the parties, and the purpose. **One intelligent query replaces hours of digging** and delivers precise, contextual results instantly.

However, even AI search is only as good as the content and metadata it has access to. Data hygiene and adequate access that respects information governance will continue to be important considerations. Data siloed in disparate locations still presents the same old search challenges – no single knowledge repository or way to search across all data. The role of the DMS, as an organization's single system of record, remains mission critical. Also, having complete, accurate, and consistent application of metadata across the entirety of an organization's knowledge dramatically improves AI search results, as well as the human function of quickly filtering through results.

Leaders of legal organizations who are looking to take maximum advantage of technology to transform the “search experience” into near-instant understanding should be aware that not all “AI search” solutions are built equal. Digging deeper to understand the real limits of different approaches to leveraging AI in search can help you make the best decision for today and for the future.

Why It Matters

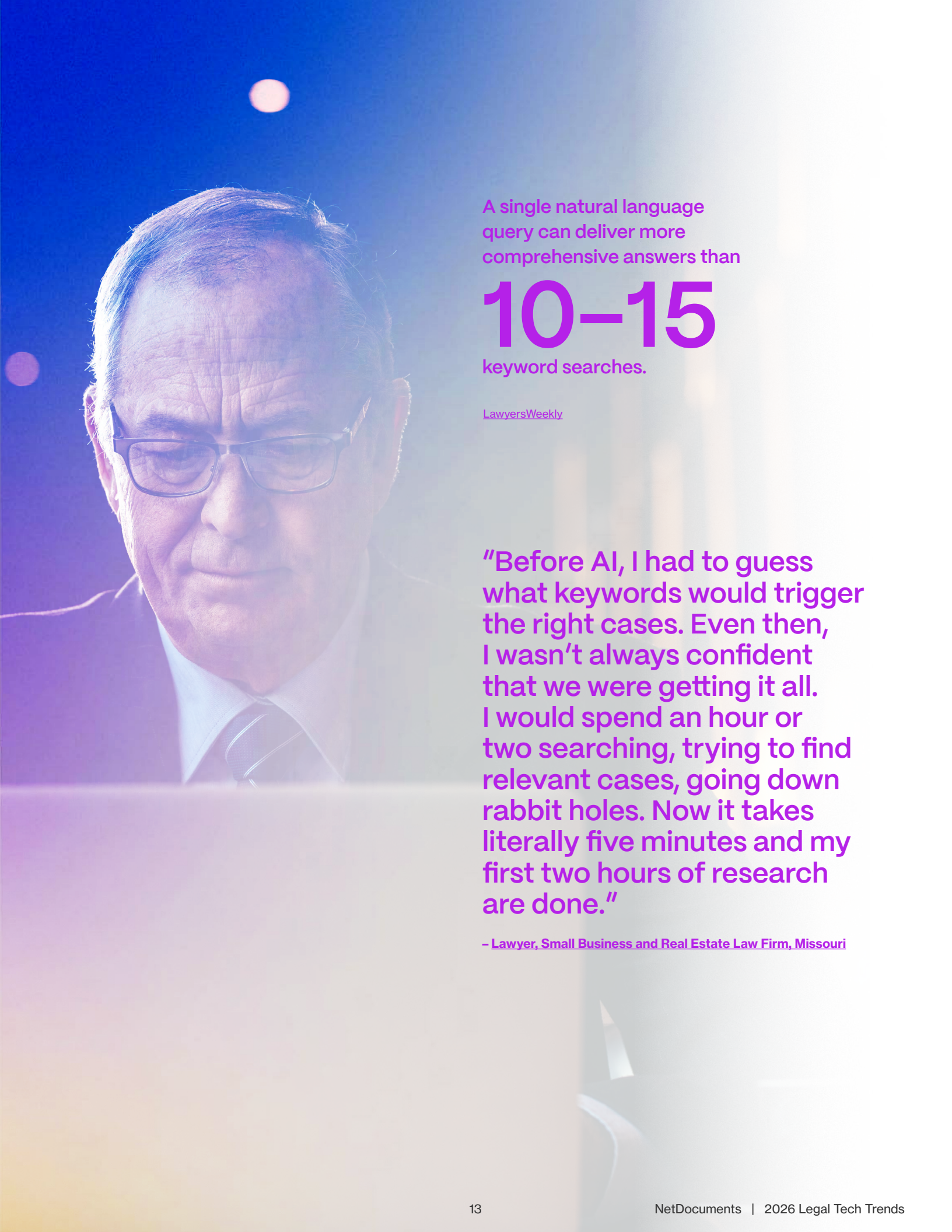
With AI search, professionals aren't just retrieving surface-level content – they're discovering knowledge. Meaning replaces matching, and every search becomes an act of insight. **Hours of finding and gathering information shrink into moments of understanding, empowering faster, sharper decision-making** in litigation, transactions, compliance, investigations, and public-sector matters.

Legal AI Search in Practice

At a 10-lawyer boutique firm focused on sports and entertainment, an associate needs to prepare an initial draft of a sports endorsement agreement for a new client using relevant precedent content. She opens the DMS and types, “Find sports endorsement deals” in the search field. In the past, she would have needed to search for “Celebrity Promotion Agreement” and then “Sponsorship Agreement” and then “Endorsement Agreement” to find relevant examples. In seconds, hours of manual searching disappear – replaced by precise, contextual answers.

AI search understands the intent behind the query – identifying the right documents and linking related precedents from similar matters. No digging through folders. **No trying to remember which partner handled which deal.** No friction. Just relevant results.

Behind the scenes, **semantic reasoning and contextual AI interpret meaning and reference relevant profile metadata** as well as content, all while respecting access controls, ensuring that every result is both relevant and secure. By 2026, small firms aren't just “searching” – they're gaining big-firm-level understanding from the knowledge they already have.

A man in a dark suit, white shirt, and patterned tie, wearing glasses, is looking down at a laptop screen. The background is a blurred office setting with warm lighting and a bokeh effect of light spots.

A single natural language query can deliver more comprehensive answers than

10–15

keyword searches.

[LawyersWeekly](#)

“Before AI, I had to guess what keywords would trigger the right cases. Even then, I wasn’t always confident that we were getting it all. I would spend an hour or two searching, trying to find relevant cases, going down rabbit holes. Now it takes literally five minutes and my first two hours of research are done.”

– [Lawyer, Small Business and Real Estate Law Firm, Missouri](#)

5 The Era of Connected Intelligence

Everything talks — securely and seamlessly.

For years, integrations have been essential. In 2026, with the rise of **agentic AI** and **intelligent automation**, integrations evolve into the **nervous system of productivity** — connecting people, platforms, and processes into a single flow of awareness.

The new era of **connected intelligence** brings harmony to the digital workspace, establishing critical connections between your expertise and content, and your chosen AI-enabled tools. **Microsoft 365, AI assistants**, legal research tools, and **firm-built apps** don't just coexist — they communicate, collaborate, and coordinate. Each system understands context, shares insights, and completes tasks in concert with the others — all while respecting data governance and security boundaries.

While no single platform will meet every niche need, **your document management system** should be the hub where connected intelligence actually happens — the place you work, where content lives, and where security is enforced by design.

As this trend accelerates, it's essential that any vendor you bring into that ecosystem is as serious about security and governance as you are — across every workflow, every AI feature, and every integration.

"You tell the AI to perform a particular legal action, and it works out how to do that, poses its own questions and works out how to navigate through a variety of different means."

- James Grice, Head of Innovation and AI, Lawfront

Why It Matters

As AI systems begin to communicate with one another, context needs to flow effortlessly — following you across every app, channel, and device. Connected intelligence dissolves silos, enabling a unified digital experience where insight moves as fluidly as thought — so **professionals spend less time switching systems and more time driving results** in service of clients, internal stakeholders, or the public.

Connected Intelligence in Practice

It's late afternoon at a midsize litigation firm, and a lawyer needs to draft a response to a motion, but the law has recently changed. Leveraging their chosen legal research tool, they can **locate and pull up a recent motion** directly from their DMS containing similar facts and update the content.

Behind the scenes, the **DMS orchestrates the connections** — pulling the document, enabling the attorney to conduct research in the legal research platform, and automatically saving the new responsive pleading to the correct matter workspace within the DMS with all permissions and audit trails intact.

By 2026, connected intelligence transforms isolated tools into a coordinated, secure environment — a connected workday where **time, context, and collaboration flow as one**.

But this doesn't happen by stitching together dozens of apps. It requires a platform that serves as the center of legal work — the system that understands your content, your governance rules, your workflows, and your security model.

While agentic AI is still
in its infancy, its growth
is accelerating:

11%

of firms are already
piloting agentic AI
tools, and

27%

are in discussions
with vendors.

ILTA



6 Knowledge That Organizes Itself

AI profiling turns documents into structured intelligence — automatically.

For decades, **metadata has been the foundation of legal work** — essential for search, organization, governance, matter management, reporting, and now AI. But metadata has always shared the same flaw: it depended on people to fill it out. And busy people rarely have time for perfect tagging.

In 2026, that changes. This is the year **the legal workspace becomes self-organizing**. It's also the year legal professionals become more selective: less swayed by AI hype, more focused on tools that quietly solve daily problems.

Legal tech teams are moving away from complex AI pilots that place a burden on users and toward ambient, embedded AI — capabilities like **automatic profiling and enrichment that deliver immediate value** within everyday workflows, without requiring new interfaces or extra effort.

AI profiling and automatic metadata enrichment **transform unstructured content into structured, contextual knowledge without human effort**. Instead of lawyers tagging documents, the system quietly reads, classifies, and connects them — identifying matter details, clauses, tasks, issues, parties, PII, work product, and relationships across the repository to support litigation, transactions, compliance, investigations, and public-sector work.

It's the beginning of **a continuously expanding, always-current knowledge graph** for the entire legal organization, enabling all manner of workflows and insights.

And with this foundation, intelligent assistants, agentic workflows, semantic search, reporting, expertise location, and predictive guidance all become dramatically more accurate — because they're finally operating on **complete, structured data without requiring additional human effort**.

Why It Matters

When knowledge organizes itself, two things happen:

1. AI becomes dramatically more accurate, relevant, and trustworthy. Semantic search improves. Smart answers sharpen. Agents take smarter action with fewer mistakes. Everything works better because the system finally understands the work.

2. Professionals stop wasting time categorizing, filing, and correcting data. The hours once spent fixing profiles or hunting for the right version of a document are returned to legal professionals, freeing them to focus more on judgment, creativity, strategic planning, and outcomes that matter to clients, stakeholders, and the public.

AI profiling **eliminates one of the most persistent sources of friction in legal work** — the administrative burden of organizing knowledge — giving professionals back headspace and momentum. In an era of AI overpromises, it's a tangible, verifiable capability that improves the workday for lawyers, legal ops, paralegals, analysts, and public-sector professionals from day one. Knowledge management lawyers are much more effective when they can work on bringing workflows with curated content to lawyers rather than doing the curation.

This is how intelligent work becomes effortless work.

AI Profiling in Practice

A litigation team uploads a new batch of deposition transcripts and discovery documents. Without a single human prompt:

- The system identifies the parties, judge, jurisdiction, witnesses, and key topics as profile metadata
- Makes key pieces of information available for search and filtering
- Tags files containing sensitive information and applies the correct DLP rules
- Classifies the documents by type and automatically places them in the correct location within the matter workspace

Corporate legal teams see similar value when they upload third-party contracts or investigation files, and **public-sector agencies** can apply the same capabilities to case files, regulatory comments, and FOIA responses – all automatically organized and classified for downstream work.

Hours of manual summarizing, tagging, and cross-referencing disappear. And when the team asks their AI Assistant for a case summary or to prepare a motion outline, it draws on a complete, structured picture of the matter – not a scattered set of untagged files.

In 2026, knowledge activation is no longer a human project. It's a background capability, woven into every moment of work.

AI profiling doesn't just make AI better; **it makes people better** – by giving them clarity, context, and the freedom to focus on what truly matters.



"The average recall increases dramatically, from 17.65% with baseline raw metadata to 62.87% with [AI-generated metadata]."

[Cornell University](#)

Making the Most of Every Moment

In 2026, intelligent work is no longer about doing more; it's about leveraging technology to make the most of every moment. Across the legal industry, technology is reshaping the workday, giving professionals time to **think deeply, advise strategically, and live more fully.**

These six trends – from intelligent assistants and adaptive automation to AI search, connected intelligence, AI profiling, and purpose-driven innovation – reveal how **the next generation of legal tech will elevate both performance and quality of life.** They eliminate friction, reduce burnout, and allow legal professionals to focus on what truly drives value.

But unlocking these benefits isn't automatic. The organizations that will lead in 2026 aren't those chasing every new technology – they're the ones who **pair innovation with intentional change management, clear strategies, and disciplined adoption.** They invest in educating their people, defining workflows, aligning stakeholders, and ensuring that new capabilities truly fit the way their teams work.

In a year when AI-powered tools will be everywhere, success won't hinge on having the most features. It will hinge on **helping people use them confidently, consistently, creatively, and securely.** Capabilities only become outcomes when teams adopt them – and when adoption becomes part of the culture. Because the most powerful results happen when technology fades into the background and professionals can focus on what they do best.

AI isn't just transforming how legal work gets done. It's helping professionals **make the most of every moment** – in work, and in life.



“The number one measurement that people wanted to hit with ROI is: am I giving people work-life balance back?”

– Zach Warren, Senior Manager, Legal Enterprise Content, Thomson Reuters Institute



Watch a panel of industry experts discuss these trends and more.

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netdocuments®

NetDocuments helps legal professionals to do their best work with an intelligent document management system (DMS) that goes beyond getting organized and brings to life seamless AI, powerful workflows, and smarter experiences. The #1 trusted cloud-native DMS for 25+ years, NetDocuments delivers tools to make work easier throughout the document lifecycle – from award-winning automation and AI to email management, search, collaboration, document bundling, advanced security, and more.

The platform also integrates with 150+ other technologies, including Microsoft 365, DocuSign, and practice management systems, making it a core solution that meets users wherever they work.

Supporting more than 7,000 law firms, corporate legal departments, and public sector organizations worldwide, NetDocuments is recognized as one of America's fastest-growing private companies, appearing on the Inc. 5000 list for four consecutive years.

To learn more, visit netdocuments.com