



Summize

LEGAL DISRUPTORS

How to Elevate the
Legal Role



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Setting the scene with Tom Dunlop

At the start of 2025, we shared a survey of over 250 in-house legal professionals, asking how they see the evolving legal role.

Three areas stood out where the pressures are the greatest: uncertainty about what evolution truly means and how to get there, the need for legal to be involved in the wider business strategy, and the increasing pressure to automate processes with tech and AI – because after all, we’re all needing to do more with less.

This time, we’re going one step further.

Our goal is to help legal teams not just evolve, but truly elevate their role. To do so, we’ve gathered insights, guidance, and inspiration from a group of remarkable in-house legal professionals who have already transformed the role – **these are our Legal Disruptors!**

These seasoned in-house experts from businesses worldwide have reshaped the legal function, challenged outdated stereotypes, and proven extremely vital to their organizations. In this new edition of our Legal Disruptors report, we share their practical advice and actionable steps on how to influence business strategy, how to use tech and AI to drive collaboration, and finally, how to deliver vital measurable impact.

Their perspectives, combined with our findings, are designed to move the industry forward. Our report reminds us that disruption isn’t about reinventing everything; it’s about considered changes that create great value for you, your legal team, and the wider business too.



Tom Dunlop

CEO and Co-Founder,
Summize

Part 1:

Reflecting on the evolving role of legal in 2025

Reflecting on the evolving role of legal in 2025

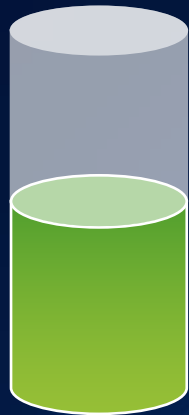
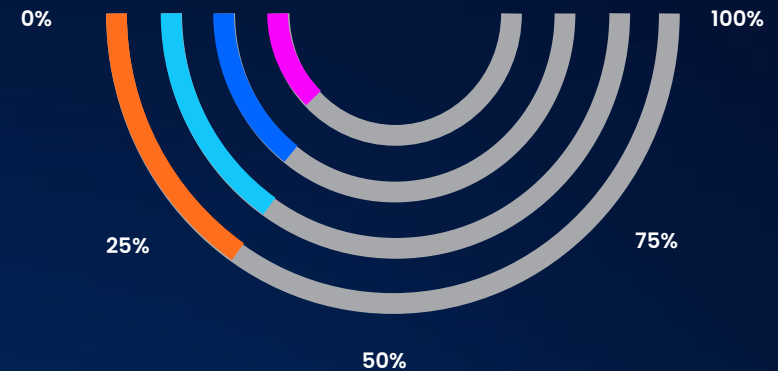
Our survey results

The Legal Disruptors survey explored the key challenges legal teams are facing. Here are the top results:



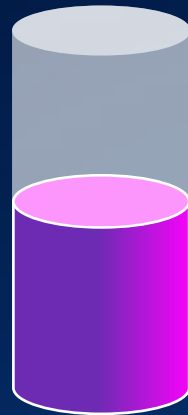
Our respondent's biggest challenges

- 32% Compliance with new regulations
- 32% Data security risks
- 30% Adopting new technologies such as AI
- 28% Positioning legal as more strategic



58%

are concerned about adopting AI and positioning legal as more strategic



45%

have AI security and privacy concerns

#1

challenge in contract management

is achieving company-wide CLM adoption

Reflecting on the evolving role of legal in 2025

2025's key challenges

Our survey revealed three key challenges that legal professionals are facing as part of the evolution of the role.

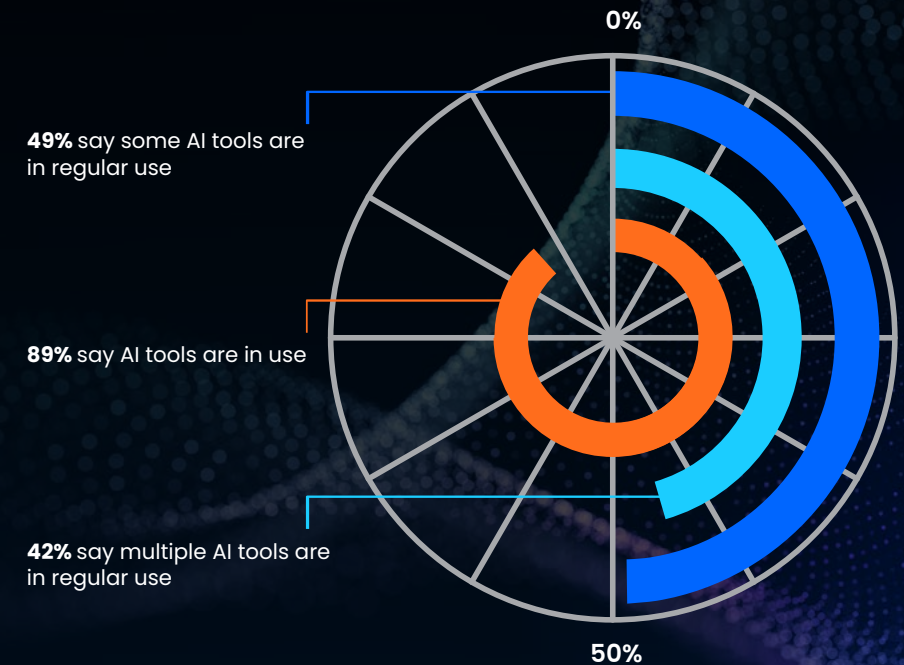
Challenge 1. The need to evolve the legal function and reshape how the wider company perceives it, while still handling routine legal tasks, such as contract management, accurately and on time.

Challenge 2. Legal teams reported feeling pressure to have a greater role in shaping the wider business strategy and demonstrating the true value of the legal function. This sentiment was voiced even more strongly among senior leaders, indicating the top-down pressure for change.

Challenge 3. The respondents stated the pressures to leverage technology and AI, often with a reduced budget and headcount. However, adoption remains uneven: while **89%** of respondents use AI, only **42%** use multiple AI tools consistently. The main reasons for lack of multiple tool use were identifying practical use cases, concerns about security and accuracy, and difficulty obtaining wider business buy-in.

The top 2 priorities for senior leaders

- transform processes with automation and tech
- increased involvement with business strategy



Reflecting on the evolving role of legal in 2025

Overcoming challenges with our Legal Disruptors

Our goal is to support legal teams in keeping pace with rapid change, while elevating their role and transforming today's challenges into opportunities for success.

This is why we have spoken with legal professionals from diverse backgrounds and industries, who are breaking outdated stereotypes and proving the true strategic value of legal. These are our Legal Disruptors.

Through a series of interviews, each shared their journey, the obstacles they overcame, and the lessons that shaped their careers and success.

While each story is unique, four common principles emerged from our conversations. Each principle exists to guide any legal professional that aims to elevate their impact, step into a strategic leadership role, and turn today's pressures into opportunities. We'll explore each principle in detail, with insights and guidance from our Legal Disruptors themselves.

Laura Proctor, CMO, Summize



What advice do you have for a legal ops teams who want time or budget to try and play with some of these tools?

Daryl Osuch, Head of Legal Ops, JERA



Firstly map a workflow. If you're jumping to a tool, you might be jumping too early, so map the workflow, see where that tool can impact. The workflow doesn't have to be complicated or sophisticated, it could be PowerPoint.

Laura Proctor, CMO, Summize



That's great advice!

Daryl Osuch, Head of Legal Ops, JERA



Thanks! Secondly, one thing we don't do enough of is the kind of analysis of time taken per step inside of that workflow. Having a half cooked estimate is better than nothing at all. So have some reasonable estimates about the time taken and the time that we could potentially save.

Part 2:

Meet our panel of Legal Disruptors

Meet our Legal Disruptors



Tom Fleuriot Founder of Flocsam

Founder of legal ops consultancy Flocsam, all about driving quick tactical change for legal teams.



Sheila Murphy Legal Coach & Consultant

Former GC at MetLife, now CEO, coach, and consultant helping legal pros advance their careers.



Claire Sanders Founder of Being Human

Former GC and now helping legal professionals reconnect with human skills at Being Human.



Patti Barnard Fractional General Counsel

Former Chief Legal Officer, now Fractional GC, helping legal teams know and prove their worth.



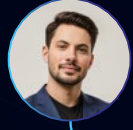
Carly Duvall Le Riche GC at Cariloop

Ambitious GC and former private practice lawyer, delivering strategic business legal change.



Kate Tyers Global Legal Director

Global Director of Legal, conference speaker and mentor, leading strategic legal value.



Ferdinand Wieland Legal Counsel

An AI and tech enthusiast, working as a Legal Counsel for European businesses.



Giovanna O'Malley Contracts Consultant

Founder of Contracts By Color, a consultancy helping businesses get the most out of contracting.



René Jovel Assistant GC and Professor

Seasoned legal professional and Professor at Marquette University, championing personal brand.



Daryl Osuch Head of Legal Operations

Legal ops expert, podcast host, and tech enthusiast, based in Japan.

Our disruptors' four emerging principles

Four key themes, advice and guidance on how to elevate the legal role.

1

Strengthen your business acumen

Learn how to become part of the strategic conversation and ensure legal gains a seat at the table.

2

Build cross-department relationships

Discover the importance of strong relationships outside of the legal team and how they create greater legal success.

3

Create a strong in-house brand

Explore the importance of defining your personal and legal brand, making sure legal is perceived as you intend.

4

Use tech and AI as your trusted partner

Don't let technology and AI hinder your legal practices, understand how it can empower your tasks and strategic output.

Part 3:

Four principles on how to elevate the legal role

1. Strengthen your business acumen

Why it matters

A key theme from both our 2025 Legal Disruptors report and interviews was the need for legal professionals to strengthen their business acumen.

In our 2025 survey, **48%** of senior leaders said legal's involvement in business strategy is vital, versus only **35%** of non-senior leaders, suggesting that senior leaders feel greater pressure from stakeholders and management teams.

Too often, legal works in a silo – as General Counsel Carly Duvall Le Riche noted, *“the same mistake I’ve seen over and over again is that they bring in legal too late.”*

Alignment between legal and the business is essential: legal must show strategic value, and business leaders must understand legal's role in growth and proactive risk management. For legal teams, this starts with deepening business knowledge and adopting a business mindset. For example, when it comes to contract management, how can legal teams gain a proactive approach to ensure contracts are used as assets to help drive revenue?

Our disruptors' advice: build your business acumen, understand what drives the company, and then make sure you're part of the strategic conversations.



“

You've got to be so much more than a lawyer now.

Kate Tyers, Global Legal Director

59%

of law departments still need to tie legal metrics explicitly to business goals.

(CMS Law 2025)



1. Strengthen your business acumen

Learn from our disruptors

Our Legal Disruptors share clear advice on how legal professionals can strengthen their business acumen.

Carly Duvall Le Riche, General Counsel at Cariloop, urges lawyers to **broaden their skillset beyond law**, from PR, to operations, to the roles filled by business executives. This broader perspective helps legal professionals speak others' language and better understand their legal needs.

With that foundation, lawyers can adopt a business-first mindset by **thinking like the business, not like lawyers**. Fractional GC Patti Barnard, reflecting on her time as an in-house General Counsel, deliberately learned sales language, revenue models, and growth strategies, so that she could be part of sales conversations.

It's then essential to **align legal's goals with the company's goals**. As Legal Counsel Ferdinand Wieland explains, "*people from the wider business are my clients.*" Supporting them on the likes of contract negotiations means driving shared goals and positioning legal as a partner, not a gatekeeper.

Finally, Legal Consultant Tom Fleuriot recommends delivering **quick tactical wins**. While long-term thinking matters, solving small issues fast can strengthen legal's impact and reduce the bottleneck stereotype. Small wins build trust and momentum, showing legal as a driver of change.

Key takeaways



Develop your practice as a generalist. Learn a lot about a lot of different things as opposed to going really deep into one narrow topic.

Carly Duvall Le Riche



Learn how to "talk the talk"— understand sales language, business revenue models, and how to scale the business.

Patti Barnard



Your legal team's mission is to deliver the business strategy while upholding your professional duties. It's that simple.

Tom Fleuriot



Know your business. As an in-house lawyer, your job is to be a strategic partner, not just a legal advisor.

Kate Tyers

2. Build cross-department relationships

Why it matters

To further develop and cement your business acumen, it's essential to build strong relationships across different departments – a key principle for many of our Legal Disruptors.

By aligning with other teams and showing the value that legal delivers, partnerships can form around shared goals.

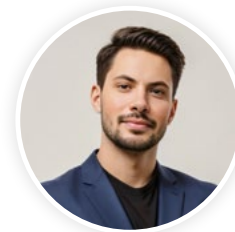
Our first Legal Disruptors report identified contract management as a key area where legal teams often operate in isolation, creating bottlenecks and slowing down processes. Even when new tools are introduced to streamline workflows, many survey respondents (32%) reported that limited company-wide adoption was the biggest barrier to success. Tools designed to accelerate legal work only deliver results when they're embraced across the entire organization.

These challenges show the importance of breaking down silos. Closer alignment with other departments makes it easier to gain buy-in and drive adoption of initiatives like technology, AI, and automation.

Our disruptors note that working closely with teams like sales was critical to their success and elevation.

In our 2025 survey, we asked legal professionals their biggest pain point when it came to contract management:

- 32% Lack of adoption or use company-wide
- 31% Contract intake process is hard to manage
- 31% Manual processes take too much time
- 29% Managing too many internal stakeholders



“

It's the people who don't know anything about legal that usually hate working with legal. But that doesn't need to be the case.

Ferdinand Wieland, Legal Counsel

2. Build cross-department relationships

Learn from our disruptors



Claire Sanders, Founder of Being Human

"Block time for focused work, but also make room to be visible and approachable." Claire used private rooms to focus but balanced this by working in the company kitchen, showing she was approachable, open to conversation, and eager to build relationships.



Patti Barnard, Fractional GC

Enable your sales team with self-serve legal tools for faster deal closures, *"I created playbooks so the sales teams were enabled and empowered to go out and negotiate smaller contracts themselves."*



Carly Duvall Le Riche, General Counsel

Carly strengthens collaboration by surrounding herself with colleagues who are committed to developing new ideas. She leans into their innovation and guidance to help advance legal initiatives.



Giovanna O'Malley, Contracts Consultant

"Legal and sales used to tag team each other when it came to contracts. We would take calls together and get the contracts done more efficiently," states Giovanna. Her collaborative approach to contracting helped accelerate business deals but also deepened trust between the teams.



Ferdinand Wieland, Legal Counsel

Once you align the business' and legal's goals, Ferdinand advises to then educate non-legal teams on your goals so that they fully understood your role, purpose and value.

3. Create a strong in-house brand

Why it matters

When asking our disruptors what ‘brand’ means to them, the responses varied widely, highlighting that there isn’t a single legal brand. Instead, there are multiple ways to shape perceptions of a successful in-house legal professional.

When asked why the legal brand isn’t already a positive brand, Claire Sanders, former GC and now Founder of Being Human, explains, *“it’s a complex profession, with years of stigma. Lawyers feel they always need to have the answers, and their professional identity is so strong that setbacks can feel all-encompassing.”*

She notes that stereotypes like the “fun police” persist, but perceptions can shift when legal professionals build their role’s brand, especially if it reflects each individual’s personality and strengths.



Read Summize’s CEO **Tom Dunlop’s** Bloomberg Law commentary on how legal can strengthen their personal brand:



Think commercially, not cautiously – Lawyers often focus on risks, but should instead ask commercial questions. This shift prioritizes business results over caution.



Employ empathy as a leadership tool – Communicate risks to internal stakeholders by framing issues in terms of their impact.



Be your own champion – Emphasize your role in negotiating high-value partnerships and aligning with key business goals. Shift your perception and become a trusted commercial leader.



Learn your company inside and out – Immerse yourself in as many aspects of the business and operational data to understand key revenue drivers.



Elevate your role as a strategic business partner – To build a distinct personal brand, in-house legal teams must align their role with company goals. Get close to all the C-suite and show how legal is a key player in defining business strategy.

**Bloomberg
Law®**

3. Create a strong in-house brand

Learn from our disruptors

1. Be authentically yourself. For René Jovel, a first-generation Salvadoran-American, embracing his culture and language is key to being himself and building trust. He projects his vibrant personality with colorful ties and bright sneakers – showing there's no single way to be a lawyer.

"I wear funky ties, I wear suits that sometimes are the non-traditional colors, I have bright sneakers, because it's all about personal brand."

2. Leverage diversity and mentors. Patti Barnard has mentored women throughout her career and served as an executive sponsor for Pride. She ensured her legal team reflected the same diversity of backgrounds and ideas in the business.

Likewise, Giovanna O'Malley champions mentorship, seeking mentors beyond her legal team to gain fresh perspectives, broaden her knowledge, and strengthen her business awareness.

3. Elevate your team's visibility. Build your legal brand by celebrating wins. Did legal prevent a risk, automate a process, or help close a major deal? As Daryl Osuch notes, *"don't assume everyone sees and recognizes your successes."*

Positive PR ensures your impact is known. Patti achieved this by securing speaking slots at company events and hosting launch parties for new legal processes, making sure the team got the attention they deserved.

4. Show up, network, communicate. Attend events, join seminars, and network. Kate Tyers shares, *"you'll find peers with similar challenges. It's less overwhelming once you share experiences."*

Sheila reinforces this, especially for solo legal teams, *"at conferences don't hide in your hotel room! Make the effort to talk and get to know each other."*



“

You can still be your authentic self and be very effective. You don't have to change your DNA, but small changes make huge differences.

Sheila Murphy, Legal Consultant

4. Using tech and AI as your trusted partner

Why it matters

Our 2025 survey revealed that **89%** of respondents were using AI, and **53%** of senior leaders viewed process transformation and automation as the strongest driver of legal evolution.

Yet, there were still many concerns among respondents: **45%** cited privacy and security, **37%** pointed to limited understanding and training, and the next biggest worry was unclear use cases.

The pressure to do more with less is increasing. Technology, AI, and automation can help, but only with the right training, tools, and business-wide adoption.

To tackle privacy and security issues, Summize's CTO, Richard Somerfield, recommends establishing an AI mandate to track and manage AI use in the workplace. Once these concerns are addressed, legal teams can focus on how AI enhances work, without the associated risks.

All our Legal Disruptors use AI and technology regularly – but more importantly, they use it strategically. They don't see it as a threat, but as a way to automate routine, low-value tasks, allowing them to use their time for the value-added work that truly elevates the legal role.



Do you have an AI mandate? Richard Somerfield, Summize's Chief Technology Officer, suggests asking these key questions to guide the process:



Can/should your data be used for AI training?



What processes/safeguards are there for using/validating AI-generated content?



What are the regulations for your company/country? Consider the countries where you also operate.



Are there restrictions on the data you feed into AI? Some data may be more internally sensitive than others.



Are there restrictions on using "personal" AI subscriptions? Or should it be company sanctioned/subscriptions only?

4. Using tech and AI as your trusted partner

Learn from our disruptors

1. Start small and experiment. Use tools and AI on low-risk tasks first to understand how the technology behaves (low-value NDAs was a common talking point). Dedicate one to two hours per week for personal and team exploration – creating an environment of sharing new ideas and collaboration.

2. Focus on problems, not tools. Technology should solve real challenges, not be adopted for appearances. Begin by focusing on your problem and then exploring how tech can solve it. Is it efficiency, cost-savings, or data and insights that you need? Let the problems drive adoption.

3. Balance technology with human judgment. AI and tech can streamline processes and provide insights, but a lawyer's judgment and "*gut instinct*" remain essential. Use technology to centralize information and to improve collaboration across teams, while ensuring your legal expertise is at the ready for accurate and well-informed decisions.

4. People-first change management. Many achieved success with technology by prioritizing people and change management first. Include your team in the tech buying journey, implementation process, and adoption roll-out, ensuring that everyone is aligned and heard at each step.



“

When looking to adopt and use technology it needs to start with, 'what are we trying to do?'

Tom Fleuriot, Founder of Floccsam



“

Three years ago, people were trying to shut down AI and I was thinking, I don't think that's the right way to go about it. Now we have been using AI for the last two and a half years, so we are pretty further along than a lot of other legal teams.

René Jovel, Assistant General Counsel



“

Let tech do what tech's good at, and let humans do what humans are good at. Together, we're a force to be reckoned with.

Claire Sanders, Founder of Being Human

Your top takeaways

We would like to thank our Legal Disruptors for sharing their time, guidance, and valuable insights that help legal teams improve their roles.

1

Strengthen your business acumen

- Learn to speak the language of your company
- Adopt a business-first mindset
- Align legal's goals with the company's goals
- Deliver quick and tactical wins as you grow your long-term strategy.

2

Build cross-department relationships

- Block time for focused work, but also remain visible and approachable
- Educate non-legal colleagues on legal's purpose
- Seek mentors outside of your team
- Empower the business with legal guidance and tools.

3

Create a strong in-house brand

- Be yourself
- Leverage diversity and mentorship
- Elevate your industry visibility
- Network and participate in industry events.

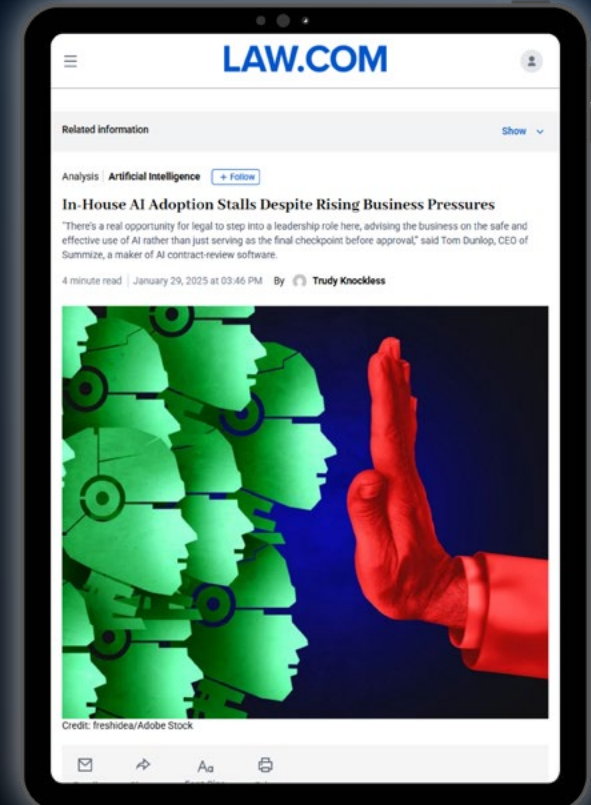
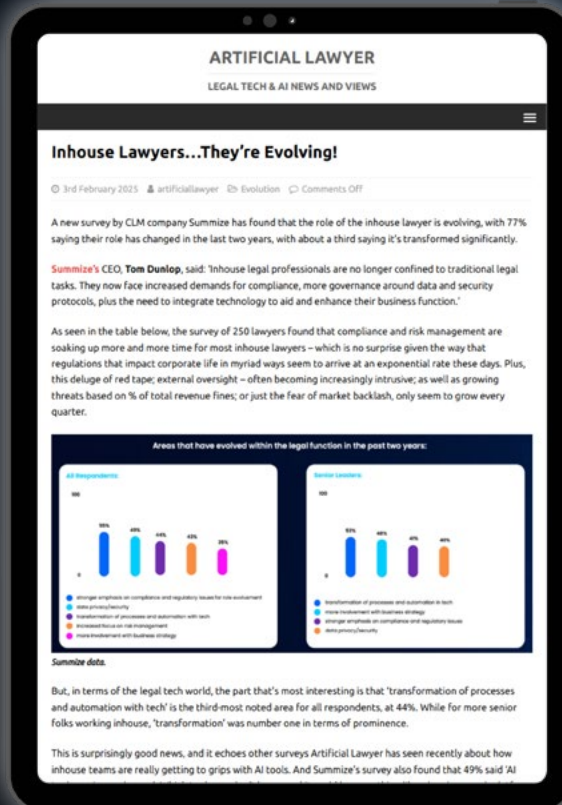
4

Use tech and AI as your trusted partner

- Start small and experiment
- Focus on problems, not tools
- Balance technology with human judgment
- Prioritize people and change management first.

Legal Disruptors in the news

We're grateful for the recognition in such esteemed publications for spreading the word about Legal Disruptors.



About Summize

Summize creates contract clarity for the whole company.

Summize's AI-powered Contract Lifecycle Management (CLM) solution creates contract clarity for the whole company by breaking the cycle of forgotten obligations, scattered intake and contract chaos.

For business teams, adoption is simple. No need to learn a completely new way of working, as Summize embeds into your familiar tools - Outlook, Teams, Slack, Gmail, Salesforce and HubSpot.

For legal teams, Summize puts you back in control with cutting-edge CLM features. Self-serve contracting reduces your workload, seamless integrations create structure, and our powerful AI supports and enhances your tasks, with your expertise in mind.

It's contract clarity for the whole company.

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