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Effective Use of Technology in Your Legal Practice (None of it Artificial)

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TECHNOLOGIES IN THE LEGAL PRACTICE

LEGAL TECHNOLOGY STACK: PRACTICE MANAGEMENT, PRODUCTIVITY, CLIENT PORTALS, E-DISCOVERY, BILLING, CRM, DOCUMENT AUTOMATION, PROJECT MANAGEMENT, AND TRANSACTION MANAGEMENT

The legal technology stack refers to the suite of software tools and platforms that law firms use to manage their operations, deliver client services, and maintain compliance. Traditionally, law firms relied on manual processes and separate closed systems, but the modern legal tech stack integrates practice management, document automation, billing, client portals, and more into a unified digital system. Law firms increasingly adopt cloud-based solutions that centralize case management, document storage, billing, and communication, enabling attorneys to work more efficiently and securely. This shift is driven by the need to reduce administrative burdens, minimize errors, and meet rising client expectations for transparency and responsiveness.ⁱ

Core components of a legal tech stack include practice management software (such as Clio, MyCase, and Filevine), document management and automation platforms, billing and accounting tools, and secure client communication portals. These tools are designed to streamline workflows, automate repetitive tasks, and provide real-time access to case information. For example, practice management platforms consolidate scheduling, case tracking, and billing into a single dashboard, while document automation tools enable attorneys to generate contracts and filings quickly and accurately. The integration of these technologies allows law firms to operate more collaboratively and respond to client needs with greater agility.ⁱⁱ

The adoption of a robust legal tech stack is no longer optional for competitive law firms. As noted by Usherwood Office Technology, the COVID-19 pandemic accelerated the transition to digital-first operations, setting a new standard for legal service delivery. Firms that invest in the right technology stack can improve efficiency, enhance client experience, and stay ahead in a rapidly evolving marketplace. Gartner predicts the legal tech market will reach \$50 billion by 2027, underscoring the importance of technology in shaping the future of legal practice.ⁱⁱⁱ

Building an effective legal tech stack requires careful consideration of a firm's workflow, compliance requirements, and integration needs. Solutions like HighQ and NetDocuments offer flexible platforms that connect with Microsoft Office, Google Workspace, and other legal tools, enabling seamless collaboration and data management. Ultimately, the goal is to create a technology infrastructure that supports both the business and practice of law, delivering better outcomes for clients and greater operational resilience for firms.^{iv}

TECHNOLOGY TRENDS AND AUTOMATION

In recent years, law firms have adopted automation and advanced technologies at a fast pace. Automation is transforming how law firms handle routine tasks, from document drafting and contract review to billing and compliance. Law firms increasingly use automation tools to reduce manual workload, improve accuracy, and free up attorneys to focus on higher-value work. For instance, document automation platforms like HotDocs and Clio Draft allow lawyers to generate complex legal documents using pre-built templates and conditional logic, minimizing errors and ensuring consistency.^v

Workflow automation is another key trend, with platforms such as Mitratech TAP and PracticePanther enabling law firms to automate case intake, task assignments, and deadline tracking. These tools streamline administrative processes, reduce bottlenecks, and enhance collaboration across teams. Automation also extends to billing and time tracking, with software like TimeSolv and Rocket Matter capturing billable hours and generating invoices automatically. By integrating automation into daily operations, law firms can improve productivity, reduce costs, and deliver more responsive client service.
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The rise of cloud computing has further accelerated technology adoption in law firms. Cloud-based platforms offer scalability, remote access, and enhanced security, supporting hybrid work environments and facilitating collaboration among distributed teams. Firms are increasingly leveraging cloud solutions for document management, e-discovery, and client communications, ensuring data is accessible and protected. Law firms are also implementing multi-factor authentication, encrypted storage, and regular security audits in response to security concerns.^{vii}

Industry experts predict that automation will continue to reshape legal practice, with emerging technologies such as predictive analytics, contract analysis, and AI-powered research tools gaining traction. Law firms must balance innovation with ethical and regulatory considerations, the benefits of automation—efficiency, accuracy, and scalability—are driving widespread adoption. As legal technology evolves, firms that embrace automation will be better positioned to meet client demands and navigate the complexities of modern legal work.^{viii}

IMPROVING CLIENT COMMUNICATIONS: CRM, VIRTUAL ASSISTANTS, CHATBOTS, SECURE MESSAGING

Effective client communication is a cornerstone of successful legal practice, and technology is playing an increasingly vital role in enhancing how law firms interact with clients. Client portals, CRM systems, and secure messaging platforms improve transparency, responsiveness, and client satisfaction. Client portals, such as those offered by Clio, MyCase, and Case Status, provide clients with real-time access to case updates, documents, and billing information, reducing the need for phone calls and emails and fostering trust.^{ix}

CRM (Customer Relationship Management) software is another critical tool for managing client relationships and communications. Legal-specific CRMs like Smokeball, Clio, and Lawmatics centralize client data, automate intake processes, and track interactions, ensuring that attorneys can deliver personalized service while maintaining compliance. These platforms enable law firms to segment clients, automate follow-ups, and monitor engagement, leading to improved retention and more effective marketing.^x

Virtual assistants and chatbots are increasingly used to handle routine client inquiries, schedule appointments, and provide case updates. These tools leverage automation and AI to deliver instant responses, freeing up staff for more complex tasks and enhancing the client experience. Secure messaging platforms, integrated with client portals and practice management systems, ensure that sensitive communications are encrypted and compliant with privacy regulations. Features such as two-factor authentication, audit trails, and role-based permissions further safeguard client data.^{xi}

The adoption of advanced communication technologies is yielding measurable benefits for law firms. Studies show that firms using client portals and secure messaging reduce email volume by up to 90% and phone calls by 30%, saving valuable time and improving client satisfaction. As client expectations for transparency and convenience continue to rise, law firms must invest in technologies that support seamless, secure, and proactive communication. Integrating CRM, virtual assistants, chatbots, and secure messaging into the legal tech stack is essential for building strong client relationships and maintaining a competitive edge.^{xii}

LAWS AND RULES OF PROFESSIONAL CONDUCT PERTAINING TO LEGAL TECHNOLOGY

ABA MODEL RULES: TECHNOLOGY, COMPETENCE AND EVOLVING DUTIES

The American Bar Association (ABA) Model Rules of Professional Conduct set the ethical foundation for attorneys nationwide, and recent updates have made technology competence a core requirement. Model Rule 1.1 (Competence) now explicitly requires lawyers to keep abreast of “the benefits and risks associated with relevant technology.” This means attorneys must understand how digital tools, cloud platforms, and AI systems impact their practice, and must continually educate themselves as technology evolves. The ABA’s Formal Opinion 512 (2024) further clarifies that lawyers using generative AI or other advanced technologies must ensure competent representation, independently verify outputs, and understand the limitations and risks of these tools. Failure to do so may result in ethical violations, especially if technology is used without proper oversight or understanding.^{xiii}

CONFIDENTIALITY, CYBERSECURITY AND CLIENT PROTECTION

Model Rule 1.6 (Confidentiality of Information) obligates lawyers to safeguard all client information, including data stored or transmitted via digital means. The ABA emphasizes that attorneys must take reasonable steps to prevent unauthorized access to client data, especially when using cloud services,

email, or AI platforms. This includes vetting third-party vendors (Rule 5.3), implementing robust cybersecurity protocols, and ensuring that any technology used does not compromise confidentiality. Secure client portals, encrypted messaging, and regular security audits are good practices in order to protect client data.^{xiv}

SUPERVISION AND NONLAWYER ASSISTANCE

The ABA’s Model Rules extend ethical obligations to the supervision of both human and non-human assistants. Rule 5.3 (Responsibilities Regarding Nonlawyer Assistance) requires lawyers to oversee the conduct of staff, vendors, and technology platforms that aid in legal service delivery. Notably, the ABA clarified in 2012 that “nonlawyer assistance” includes outputs generated by AI and other technologies. Lawyers must supervise and review technology-generated work as they would with a junior associate or paralegal, ensuring accuracy, reliability, and compliance with ethical standards. This supervisory duty is especially critical when using AI for research, drafting, or client communications.^{xv}

COMMUNICATION, FEES AND CLIENT CONSENT

Model Rule 1.4 (Communication) requires lawyers to keep clients informed about the means and methods used to achieve their objectives, including the use of technology. Clients should be reasonably consulted about the use of AI, cloud platforms, or other digital tools in their matters. Rule 1.5 (Fees) mandates that billing practices reflect actual time and value delivered, especially when technology accelerates work. For example, if AI enables a lawyer to complete a task in minutes rather than hours, the fee must be reasonable and correspond to the time spent, not the traditional hourly rate.^{xvi}

STATE AND LOCAL GUIDANCE, CLE REQUIREMENTS AND BEST PRACTICES

Many state bars and local ethics committees have issued additional guidance on technology use in legal practice, often mirroring the ABA’s standards. For instance, the State Bar of California’s Practical Guidance for Generative AI and similar resources from other states reinforce the duty of competence, confidentiality, and supervision. Continuing Legal Education (CLE) requirements increasingly mandate technology training, and law firms are encouraged to adopt written policies, conduct regular audits, and provide ongoing staff education. It is important to consider integrating technology in a responsible manner.^{xvii}

CLOUD COMPUTING AND CYBERSECURITY

Cloud computing has become a foundational technology for law firms of all sizes, enabling remote access, collaboration, and business continuity. According to the ABA’s 2024 Cloud Computing TechReport, approximately 75% of attorneys now use cloud-based tools for work-related tasks—a significant increase from previous years. Microsoft 365, Teams, Dropbox, Clio, and NetDocuments are among the most widely adopted platforms, reflecting a shift toward integrated, always-on legal operations.^{xviii} The ABA notes that while adoption is strong, solo practitioners lag behind larger firms, and many lawyers still underreport

their cloud use due to unfamiliarity with terminology or tools.^{xxix}

The benefits of cloud computing for law firms are substantial: scalability, cost efficiency, and the ability to collaborate seamlessly across locations. Cloud services operate on a subscription model, turning capital expenses into predictable operating costs. They also support disaster recovery, automatic backups, and rapid scaling as firms grow. However, the ABA emphasizes that confidentiality and security remain the top concerns for legal professionals, with 55% of survey respondents citing these as primary barriers to adoption. Concerns over data control and compliance with ethical obligations are also significant.^{xx}

The ABA Model Rules of Professional Conduct provide the ethical framework for lawyers using cloud technology. Rule 1.1 (Competence) requires attorneys to understand the benefits and risks of relevant technology, including cloud platforms. Rule 1.6 (Confidentiality) obligates lawyers to take reasonable steps to prevent unauthorized access to client information, which includes vetting cloud vendors and implementing robust security protocols. Rule 5.3 (Supervision) extends these duties to third-party providers, requiring oversight to ensure compliance with professional obligations. The ABA's guidance is clear: lawyers must be technologically competent and proactive in safeguarding client data.^{xxi}

To comply with ABA rules, law firms must implement a range of security measures when using cloud services. Encryption of data at rest and in transit is essential, as is restricting access to authorized personnel through strong authentication and two-factor verification. The ABA recommends regular security audits, clear data breach response plans, and ongoing staff training. Formal Opinion 483 specifically addresses the need for lawyers to act reasonably and promptly in the event of a data breach, including notifying clients and mitigating harm. The opinion also encourages the development of incident response plans tailored to the firm's size and risk profile.^{xxii}

Selecting a cloud service provider is not a "set it and forget it" decision. The ABA and state bar ethics opinions stress the importance of due diligence: lawyers must evaluate a provider's security protocols, reputation, and compliance with legal industry standards. This includes reviewing contracts for data ownership, breach notification, and service level agreements. Ongoing oversight is required to ensure that providers continue to meet evolving security and confidentiality requirements. The ABA's Cloud Computing Ethics Guide and numerous state bar opinions provide practical checklists for vendor evaluation and ongoing monitoring.^{xxiii}

Law firms are prime targets for cybercriminals due to the sensitivity and value of the data they hold—intellectual property, financial records, privileged communications, and regulatory filings. The ABA's 2023 Cybersecurity TechReport found that 29% of law firms reported experiencing a security breach, with consequences ranging from loss of client trust to malpractice claims and regulatory penalties. The unique nature of attorney-client privilege means that a single breach can have lasting legal and reputational consequences. The ABA Cybersecurity Handbook and related resources offer guidance on building comprehensive cybersecurity programs to address these risks.^{xxiv}

ALTERNATIVE LEGAL SERVICE PROVIDERS

Alternative legal service providers (ALSPs) are organizations or entities outside traditional law firms that

offer a range of legal and support services, often leveraging technology and specialized expertise to deliver efficient solutions. ALSPs include independent companies, law firm affiliates, large accounting firms, and freelance attorney platforms. They provide services such as e-discovery, document review, contract management, compliance, legal research, and litigation support. The American Bar Association (ABA) recognizes the growing role of ALSPs in the legal industry, noting that their rapid adoption is driven by the need for cost savings, scalability, and access to advanced technology tools (ABA Law Practice Division, 2025 Legal Industry Report; ABA TechReport 2024).

ALSPs have transformed the delivery of legal services by enabling law firms and corporate legal departments to outsource routine or high-volume tasks, freeing attorneys to focus on complex legal work. These providers often integrate cutting-edge technologies—such as contract analytics, workflow automation, and secure cloud platforms—to streamline processes and improve accuracy. The ABA’s TechReport highlights that ALSPs are particularly effective in areas like e-discovery and contract review, where automation and specialized expertise can significantly reduce costs and turnaround times (ABA TechReport 2024; ABA Center for Innovation).

While ALSPs offer many benefits, the ABA emphasizes the importance of understanding the ethical and practical implications of outsourcing legal work. Attorneys must ensure that ALSPs maintain appropriate security and confidentiality standards, and that their services comply with professional conduct rules, especially regarding supervision and client protection. The ABA Model Rules require lawyers to oversee nonlawyer assistance and to communicate clearly with clients about the use of third-party providers. As ALSPs continue to expand their market share, law firms are encouraged to evaluate providers carefully, monitor performance, and establish clear agreements regarding data protection and scope of services (ABA Model Rules of Professional Conduct; ABA Law Practice Division).

PRACTICAL APPLICATIONS

ADOPTION

Adopting new technologies in legal practice starts with a clear assessment of your firm’s needs and workflows. Begin by identifying areas where technology can streamline processes, reduce manual work, or improve client service—such as document management, billing, or client communications. Involve your team in evaluating potential solutions, and prioritize platforms that integrate well with your existing systems and meet security and compliance requirements. Start with pilot programs or phased rollouts to test new tools in a controlled environment, allowing you to gather feedback and make adjustments before full implementation.

Continuous education and support are key to successful technology adoption. Invest in training for attorneys and staff to ensure everyone understands how to use new systems effectively and securely. Establish written policies for technology use, data protection, and ongoing maintenance, and encourage a culture of openness to innovation. Regularly review your technology stack to stay current with industry trends and best practices, and don’t hesitate to seek advice from peers or professional organizations. By taking a thoughtful, collaborative approach, you can harness technology to enhance your practice and

deliver better outcomes for your clients.

TRAINING

Providing effective training to attorneys on new technologies begins with a needs assessment and a tailored approach. Start by identifying the specific tools or platforms that will be introduced, and consider the varying levels of tech proficiency among your attorneys. Develop training materials that are clear, practical, and relevant to daily legal work—such as step-by-step guides, video tutorials, and live demonstrations. Schedule interactive workshops or webinars where attorneys can ask questions, practice using the technology, and troubleshoot common issues in real time. Encourage hands-on learning by incorporating real case scenarios and workflows, making the training directly applicable to their practice.

Ongoing support is essential for successful technology adoption. Designate tech champions or super-users within your firm who can provide peer-to-peer assistance and serve as points of contact for troubleshooting. Offer refresher sessions and update training materials as technologies evolve or new features are added. Create a feedback loop by soliciting input from attorneys on what works and where they need more guidance, and use this information to continuously improve your training program. By fostering a supportive learning environment and prioritizing practical, accessible training, you can help attorneys confidently integrate new technologies into their practice.

ⁱ 2025 Report on Technology and the Future Practice of Law; Virginia State Bar; June 13, 2025.

ⁱⁱ Most Effective Tech Stacks for Law Firms in 2025; August 15, 2025; <https://www.usherwood.com/blog/most-effective-tech-stacks-for-law-firms-in-2025>.

ⁱⁱⁱ *Id*; Khanachivskyi, Oleg; The Essential Components of a legal Tech Stack for Modern Law Firms, November 6, 2025; <https://litslink.com/blog/the-essential-components-of-a-legal-tech-stack-for-modern-law-firms>.

^{iv} Thomson Reuters, How this Modern Law Firm Harnesses a Flexible Legal Tech Stack, April 4, 2024; <https://legal.thomsonreuters.com/blog/how-this-modern-law-firm-harnesses-a-flexible-legal-tech-stack/>.

^v 2025 Report on Technology and the Future Practice of Law; Virginia State Bar; June 13, 2025; Ayer, Andy; The 12 Best Legal Document Automation Software Platforms of 2025, December 11, 2025, <https://bluenotaryonline.com/best-legal-document-automation-software/>.

^{vi} Aston, Ben, 23 Best Legal Workflow Software in 2025, *The Legal Practice*, Oct. 27, 2025; <https://thelegalpractice.com/tools/best-legal-workflow-software/>; Miranda, Dana, et al., The Best Legal Billing Software, *Forbes*, Nov. 1, 2024; <https://www.forbes.com/advisor/business/software/best-legal-billing-software/>.

^{vii} Most Effective Tech Stacks for Law Firms in 2025; August 15, 2025; <https://www.usherwood.com/blog/most-effective-tech-stacks-for-law-firms-in-2025>.

^{viii} Khanachivskyi, Oleg; The Essential Components of a legal Tech Stack for Modern Law Firms, November 6, 2025; <https://litslink.com/blog/the-essential-components-of-a-legal-tech-stack-for-modern-law-firms>.

^{ix} Best Client Portals for Law Firms, Dec. 15, 2025; <https://www.casestatus.com/blog/best-client-portals-for-law-firms>.

^x 6 best CRMs for legal businesses in 2025, Aug. 22, 2025; <https://blog.hubspot.com/marketing/best-crm-for-legal->

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^{xi} 7 best client portal tools for law firms in 2025, Jun. 17, 2025; <https://assembly.com/blog/law-firm-client-portal>. Top client portal software for law firms to watch in 2025, Nov. 20, 2025; <https://www.moxo.com/blog/best-law-firm-client-portal-software>.

^{xii} 2025 Report on Technology and the Future Practice of Law; Virginia State Bar; June 13, 2025. Best Client Portals for Law Firms, Dec. 15, 2025; <https://www.casestatus.com/blog/best-client-portals-for-law-firms>.

^{xiii} ABA issues first ethics guidance on lawyer's use of AI tools., July 29, 2024;

<https://www.americanbar.org/news/abanews/aba-news-archives/2024/07/aba-issues-first-ethics-guidance-ai-tools/>. ABA ethics rules and Generative AI, Mar. 27, 2025; <https://legal.thomsonreuters.com/blog/generative-ai-and-aba-ethics-rules/>.

^{xiv} Davis, Alex, Understanding the ABA Model Rules of Professional Conduct: Cybersecurity & IT Compliance for Legal Professionals, Jul. 11, 2025; <https://blog.sourcepass.com/sourcepass-blog/aba-model-rules>. 2025 Report on Technology and the Future Practice of Law; Virginia State Bar; June 13, 2025.

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^{xx} *Id.*

^{xxi} Davis, Alex, Understanding the ABA Model Rules of Professional Conduct: Cybersecurity & IT Compliance for Legal Professionals, Jul. 11, 2025; <https://blog.sourcepass.com/sourcepass-blog/aba-model-rules>. 2025 Report on Technology and the Future Practice of Law; Virginia State Bar; June 13, 2025.

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