Bressler Risk Blog

Survey Report

August 2026

The Future of AI and Agentic Workflows in New Business Intake, Conflicts Management, and Client Evaluation

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Survey Report

Survey Overview

Welcome to the 2026 Bressler Risk Blog survey report on agentic AI for risk operations. This survey explores current attitudes and future aspirations of law firm risk, IT, operational, and business leaders regarding the application of agentic AI to client evaluation, conflicts management, and new business intake.

We saw healthy survey participation — 107 individuals contributed to this effort, with notable cross-functional representation.

As expected, the majority (75%+) of participants identified as risk management professionals, with 6% identifying as information governance, and the remaining 19% distributed somewhat evenly across attorney / practice leadership, technology, innovation, executive management, and other operational roles.

Survey Mechanics

- The survey launched on June 16, 2026, and remained open for approximately six weeks.
- All participants received the same survey. To counterbalance responses and avoid option-order bias, the presentation order for most “multi-select” questions was randomized for each participant.
- All collected data was anonymized and aggregated in a central repository for analysis. While comments submitted by participants are included in this report, every effort was made to ensure that no information identifying firms or individuals is revealed.

Special thanks to all who participated! I am also grateful to Intapp for sponsoring this exercise. *(For those looking to support my risk efforts, consider letting those folks know you appreciate their investment in this risk research.)*

Best regards,

Dan Bressler

"Once men turned their thinking over to machines in the hope that this would set them free. But that only permitted other men with machines to enslave them."

"What do such machines really do? They increase the number of things we can do without thinking. Things we do without thinking — there's the real danger."

— Frank Herbert (*Dune*, 1965; *God Emperor of Dune*, 1981)

"Any sufficiently advanced technology is indistinguishable from magic."

— Arthur C. Clarke (*Profiles of the Future*, 1973)

"The future is already here — it's just not very evenly distributed."

— William Gibson (*Fresh Air*, 1993)

Introductory Thoughts — Dan on Risk and AI

Sure, it's arguably unconventional to start a report about AI adoption with cautious science fiction warnings about "thinking machines" published *sixty years ago*. But to quote an even more obscure bit of sci-fi wisdom: "Truth is truth."

As I turned to review the fascinating responses and comments from participants in this survey, I kept coming back to these quotes and themes. There's no question that AI is here, and that it's here to stay — particularly in the practice of law. But the challenge of translating lawyer productivity into profit remains an enigma receiving increasing attention. As firms continue to make massive financial investments in tools and tokens and models, there's still plenty of fuel for that fire.

On the business and operational side of law firms, AI is still finding its footing. There's a larger conversation at play, as firm innovation leaders, consultants, and vendors race to deliver efficiency-improving, bottom-line-profitability-boosting enhancements that deliver on the promises of AI.

It's clear that many intelligent people are thinking deeply about how AI can and will change the way law firms run and serve clients. There *is* magic here — literally, models and weights and parameters and more that come together in ways not fully understood to deliver information and action.

And it's in this environment that I found myself curious about AI in the context of risk management operations. The curiosity that led to this survey is rooted in two key moments.

One key moment that piqued my curiosity about our AI future occurred at the start of 2026. In an email exchange, a Senior Conflicts Analyst at an Am Law 100 firm reached out to me to discuss risk staffing trends. I was struck by their self-described "apprehension" about long-term job security in the age of AI. This person wrote:

> *"My theory: firms are looking at AI and thinking, 'for risk purposes (and lower malpractice insurance premiums) I want a JD signing off on this conflict. But we don't need as much non-JD manpower going forward, because the AI will do it instead.'"*

I've been observing technology adoption patterns for decades. I've worked for several companies — directly, and as a consultant — pursuing AI innovation both in and out of the "legaltech" sphere. And human factors, more than anything, determines technology winners and losers.

How do the people doing the work of law firm risk management today, and the people managing those teams, think about the potential of AI? I was curious...

A second moment driving this curiosity was reviewing the annual BRB risk compensation survey report (www.bresslerriskblog.com/comp25). For the second year in a row, I asked risk managers: "What risk initiatives, if any, is your firm focusing fresh investment in new staff or new resources for in [the next year]?" AI shone brightly in the responses. Here's a sampling from last year's report:

"All things around AI compliance." (1000+ Lawyers)

"We are AI focused. Looking [at] any efficiencies that can be gained through AI." (500-999 Lawyers)

"Lots of AI stuff - introduction of ability to use Co-Pilot and Harvey." (100-249 Lawyers)

"We will be implementing Intapp conflicts in 2026 and will likely build an AI-enhanced AML/KYC procedure to be implemented in 2026." (500-999 Lawyers)

"I just started an AI working group within the department to explore uses of AI for efficiency." (500-999 Lawyers)

"New technology for research utilizing AI is the target for the foreseeable future." (500-999 Lawyers)

"Focus on how AI can assist in clearance process, particularly in analyzing and summarizing the conflicts reports." (1000+ Lawyers)

"We are looking to replace our new business intake platform and are exploring AI tools to help automate some of the more repetitive tasks we complete with each new business intake review." (1000+ Lawyers)

"Automating engagement letters; utilizing AI for conflict clearances." (1000+ Lawyers)

"AI assessment and implementation, Know Your Client requirements and new client due diligence." (500-999 Lawyers)

This was a marked and expected increase in these themes compared to the 2024 responses, which saw only three or four mentions of AI adoption in response to the same question.

What progress have risk leaders made in the year since? How have their appetites and aspirations for AI changed as they've been exposed to more opportunities to adopt it in practice?

Again, I was curious…

And now we have a survey and report that I hope adds much greater clarity regarding how firms are navigating this time of innovation, promise, and change.

Designing this survey was an interesting exercise in creative exploration. I confess that I'm more of a pragmatist when it comes to the visionary promises of new technologies. I have no doubts about the transformative potential of new software, but I like to see results before making big bets.

But in developing this survey — in researching, discussing, and thinking about the capabilities of today's AI applied to risk management operations, and the potential of what is emerging on the "agentic" horizon — I found myself thinking "What if it *really could*…"

This survey is an exercise that pulls on the threads of those "what ifs."

Of course, there were participants who are "AI cautious" — the survey was open to and designed to collect input from enthusiasts and skeptics alike. And even the enthusiasts expect "human-in-the-loop" workflow execution and auditable reasoning trails to review in any AI software system they use.

But it's clear from the data that most operational leaders welcome AI into the mix of risk.

The quote that best sums up the appeal came from a risk leader in the office of the General Counsel at one mid-sized firm. When asked to prioritize a series of potential agentic AI automations for conflicts clearance and reporting, they wrote: **"These would be total game-changers."**

I'm quite curious to see how this emerging future plays out. How fast can vendors turn demos into live deployments? How fast will firms adopt agentic AI? What unexpected and interesting results will we see?

Whatever happens, I suspect we'll read about it on a pretty good, human-curated blog…

A Common Frame of Reference — Participant Context and Instructions

To establish a shared understanding, participants were provided with a standard introduction that defined key terms and scope of the exercise:

This survey explores current attitudes and future aspirations of law firm risk, IT, operational, and business leaders regarding the application of Agentic AI to executing client evaluation, conflicts management, and new business intake.

For the purposes of this exercise, "Agentic Artificial Intelligence" (Agentic AI) refers to systems capable of autonomously executing multi-step workflows to achieve a specific objective.

Agentic AI Capabilities Include:

- Integration of data from multiple internal and software systems and data repositories
- Planning and reasoning
- Complex analysis, risk scoring, and evaluation
- Business process execution (autonomously or in conjunction with active "Human-in-the-Loop" review)
- Agentic AI may be delivered as a standalone experience (Copilot Studio), through custom tools developed by IT teams, or as native functionality embedded within a vendor-provided software application.

Furthermore, because survey participants were asked to consider several hypothetical, AI-driven technology capabilities, they were instructed to evaluate these under the following framework:

For the purposes of this survey, ***please assume*** that any theoretical functional capabilities described **have been tested, proven to be effective, and demonstrated to comply with any standards your firm has in place or will establish.**

Put otherwise, these questions are not asking whether you "trust" AI at this point in time.

They are asking whether, *assuming* your firm has developed appropriate confidence in AI to execute a specific task or workflow, and the capabilities were made available as part of your internal software systems, you / your firms would want to use AI to execute that task or workflow in practice.

Participant Demographics in Greater Detail

Risk Roles and Responsibilities

Among the more than 75% of respondents who identified as having risk roles, an analysis of reported job titles shows significant participation from legal risk leadership (e.g., General Counsel) and operational risk leadership (e.g., Risk Directors). The data also reflects strong input from support staff providing legal analysis (e.g., Risk Lawyers) and operational staff overseeing and executing client evaluation and intake.

Participation Level	Risk Role Category	Indicative Titles
30%	Risk Leader	Director of Intake and/or Conflicts, Global Head of Conflicts, Chief Risk Officer, Director of Legal Compliance, etc.
25%	Office of the GC	General Counsel, Deputy General Counsel, Associate General Counsel, Assistant General Counsel, etc.
18%	Risk Lawyer	Conflicts Attorney, Lateral Conflicts Lawyer, Client Contracts Counsel
14%	Risk Manager	Conflicts / Intake Manager
12%	Risk Staff Analyst	Conflicts Analyst, Risk Analyst, Research Analyst

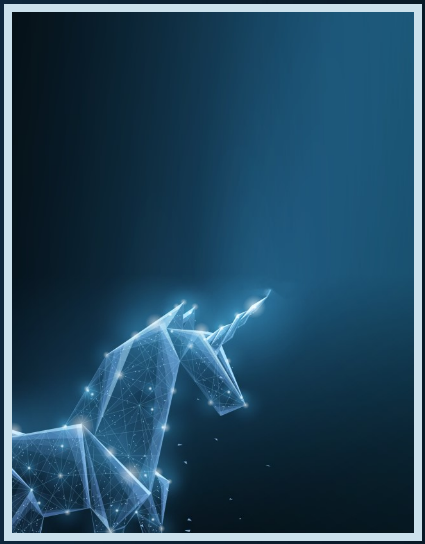
Firm Sizes

Most participants came from mid-sized and large law firms. All but two participating firms had at least 100 lawyers.

Participation Level	Firm Size
18%	50 - 249
21%	250 - 499
23%	500 - 999
38%	1000+

Section 1:

Potential AI Use Cases — Business & Risk Evaluation



Section 1: Observations

This section explores the state of law firm AI technology adoption, and interest levels in a variety of potential agentic AI risk management software capabilities. While drawing broad conclusions from aggregate survey data carries risk, the data highlights several clear, noteworthy themes.

When it comes to AI adoption, the dominant industry theme has focused on the practice of law — drafting documents, synthesizing firm knowledge, reviewing contracts, and more. When evaluating opportunities for harnessing agentic AI in risk management, respondents generally prioritized use cases that **reduce administrative friction, consolidate complex information streams, help ensure compliance, and eliminate high-cost human error in data-heavy processes.**

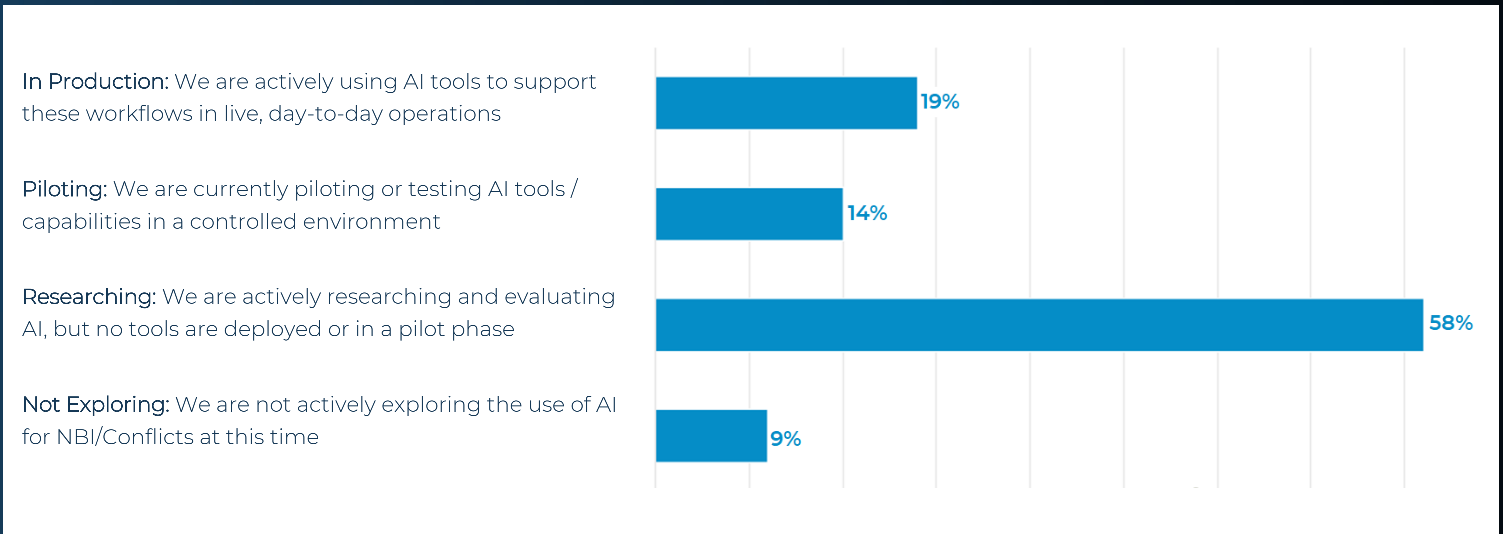
- **Data Management Over Legal / Business Judgment** — Firms are drawn most to agentic AI capabilities that streamline intake data management and review, particularly Outside Counsel Guidelines and corporate tree mapping. Conversely, tasks that require greater legal or business judgment, such as evaluating reputation risk or positional conflicts, garner less interest. Results suggest strong interest in easing operational management of factual data, while leaving subjective determinations to humans.

- **Loss Prevention Over Business Optimization** — Participants express greater enthusiasm for professional risk avoidance over commercial alignment, when asked to rank functionality that analyze business issues like pricing, cross-sell opportunity, or business segment portfolio concentration. Though the majority express moderate to strong interest in risk software capabilities that analyze client commercial viability and strategic alignment.

- **Continuous Monitoring with Caveats** — To the extent firms are considering moving from “point-in-time” conflicts review at intake to ongoing monitoring, they prioritize software capabilities that automate tracking, review, and escalation of changes based on external data, over internal shifts driven by practice teams and lawyers. This is expressed by much stronger interest in dynamic corporate tree mapping updates and sanctions watchlist alerts (external factors), versus positional drift, changes in the scope of client engagements, or business model misalignment (internal shifts).

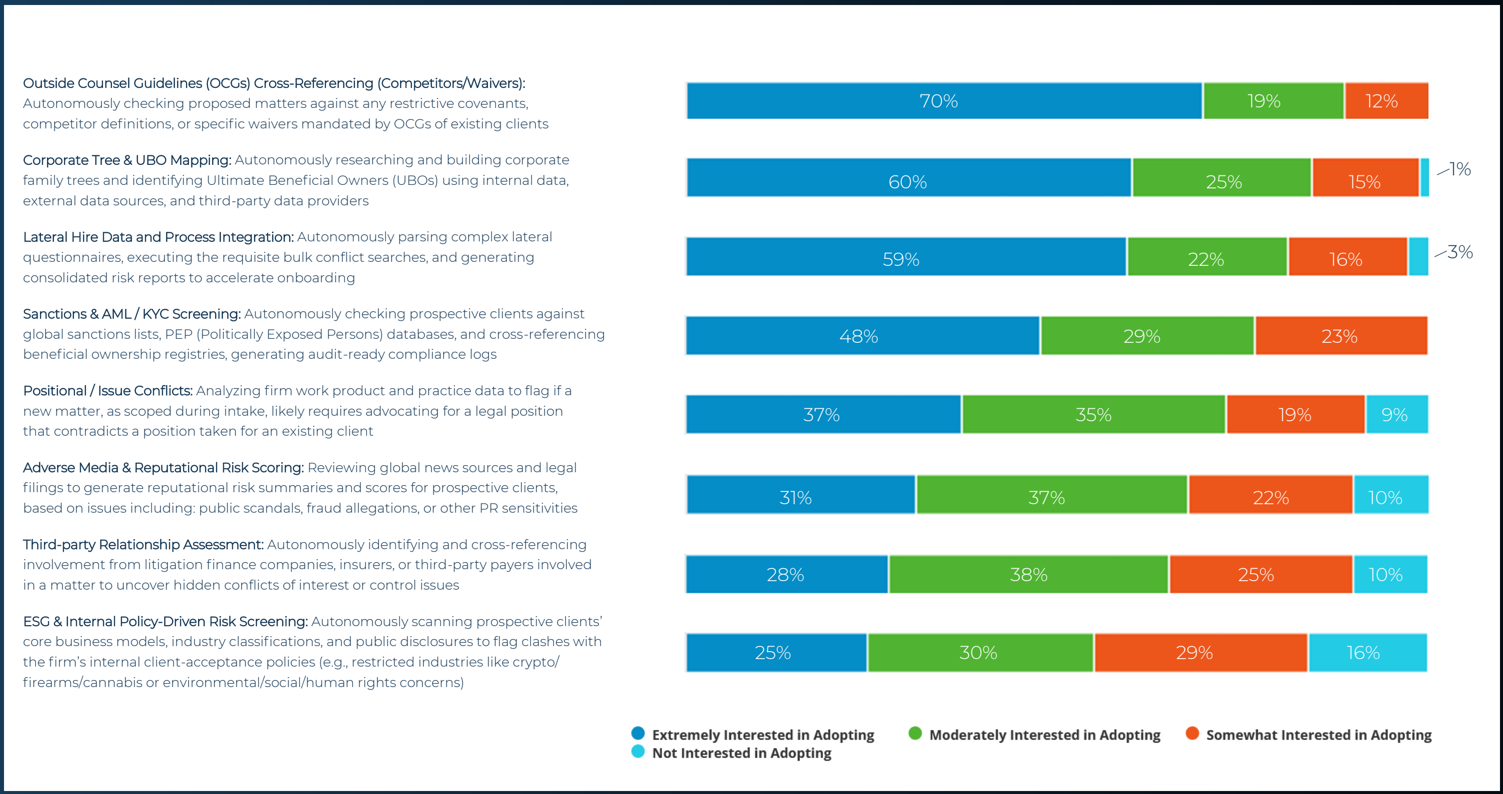
Question 1:

To what extent is your firm currently using AI technologies (either generative or agentic) to support New Business Intake, Client Evaluation, and Conflicts Clearance processes? [Select One]



Question 2:

Which of the following agentic AI capabilities related to client risk screening and evaluation would you be interested in adopting? [Multi-Select]



"Scanning external databases to determine if laterals (or existing firm attorneys) hold director or officer positions outside the firm. Same for any governmental positions that may be held."
[Risk Leader, 1000+ Lawyer Firm]

"Monitoring of M&A activity for thrust upon conflicts"
[Risk Leader, 1000+ Lawyer Firm]

"Initial review and negotiation of OCGs"
[Office of the GC, 500-999 Lawyer Firm]

"A program that can perform alter ego analysis pulling from reputable databases"
[Risk Lawyer, 500-999 Lawyer Firm]

"Pulling useful citations in Legal Research."
[Information Governance Staff, 100-249 Lawyer Firm]

"Setting up and maintaining ethics screens; communications with lawyers around obtaining waivers; sorting multiple engagement letters to determine current terms of engagement"
[Office of the GC, 1000+ Lawyer Firm]

"Data entry — capturing conflict requests at point of receipt"
[Risk Leader, 250-499 Lawyer Firm]

"Summarizing Client Quality Searches as part of New Business Intake"
[Office of the GC, 250-499 Lawyer Firm]

Question 3:

Which of the following agentic AI capabilities for evaluating the **commercial and strategic viability** of new matters would you be interested in adopting? [Multi-Select]

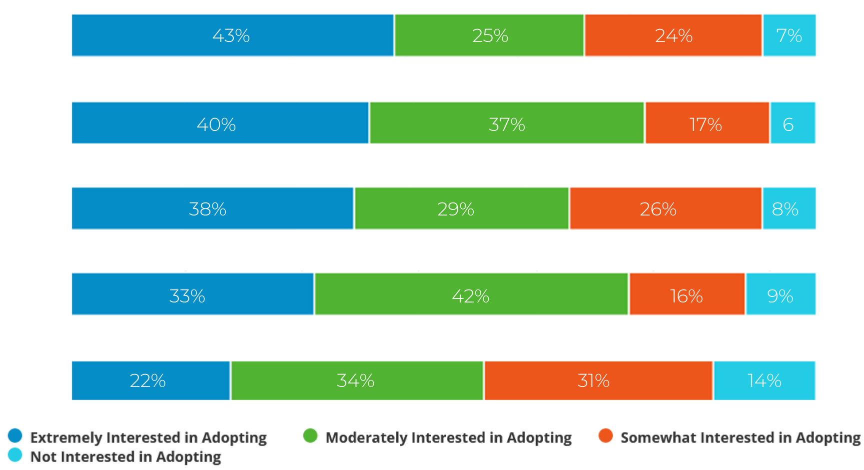
Opportunity Cost & Conflict Avoidance: Predicting whether accepting a specific matter (or agreeing to its restrictive OCGs) will disqualify the firm from pursuing more lucrative future engagements

Historical Realization & Margin Modeling: Analyzing a returning client's past billing, write-offs, and realization rates to recommend whether to accept, reject, or renegotiate fees or terms for the new matter

Strategic Fit & Growth Alignment: Cross-referencing proposed matters against the firm's stated strategic goals (e.g., flagging low-margin work requested in non-strategic practice areas)

AFA & Pricing Structuring: Autonomously parsing historical matter data to propose optimal Alternative Fee Arrangements (e.g., flat fees, collars, success fees) tailored to the specific risk profile of the new engagement

Revenue Concentration & Portfolio Risk: Evaluating how adding a new corporate parent or subsidiary impacts the firm's overall revenue concentration and financial exposure to a specific industry downturn



Question 4:

In the context of **client intake operations (beyond conflicts)**, which of the following agentic AI use cases would you be interested in adopting? [Multi-Select]

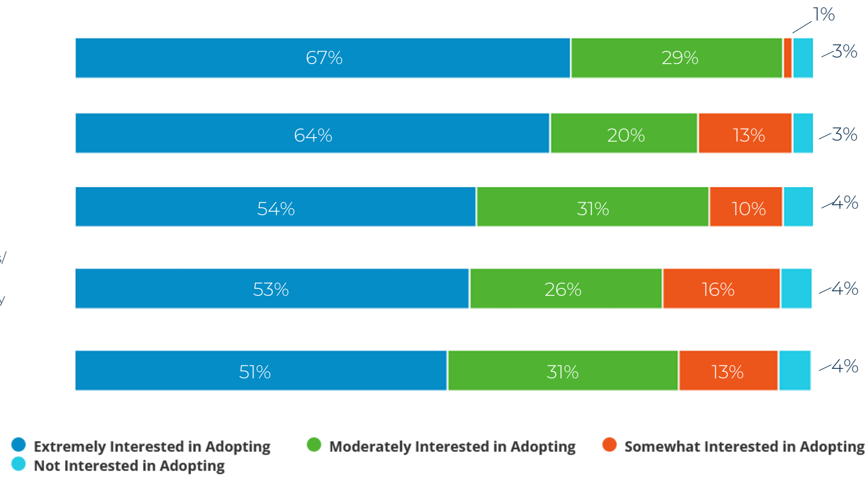
OCG Extraction & Analysis: Autonomously extracting terms from Outside Counsel Guidelines (OCGs) to flag and escalate non-standard terms or overly restrictive mandates for human review

Intake Triage & Data Validation: Autonomously reviewing incoming matter requests for missing data (e.g., billing addresses, complete party lists) and quickly routing them back to the originating partner for correction, before requests enter the risk team's queue

Waiver & Engagement Letter Drafting: Generating customized initial drafts of conflicts waivers and engagement letters, based on the specific parties and OCG terms

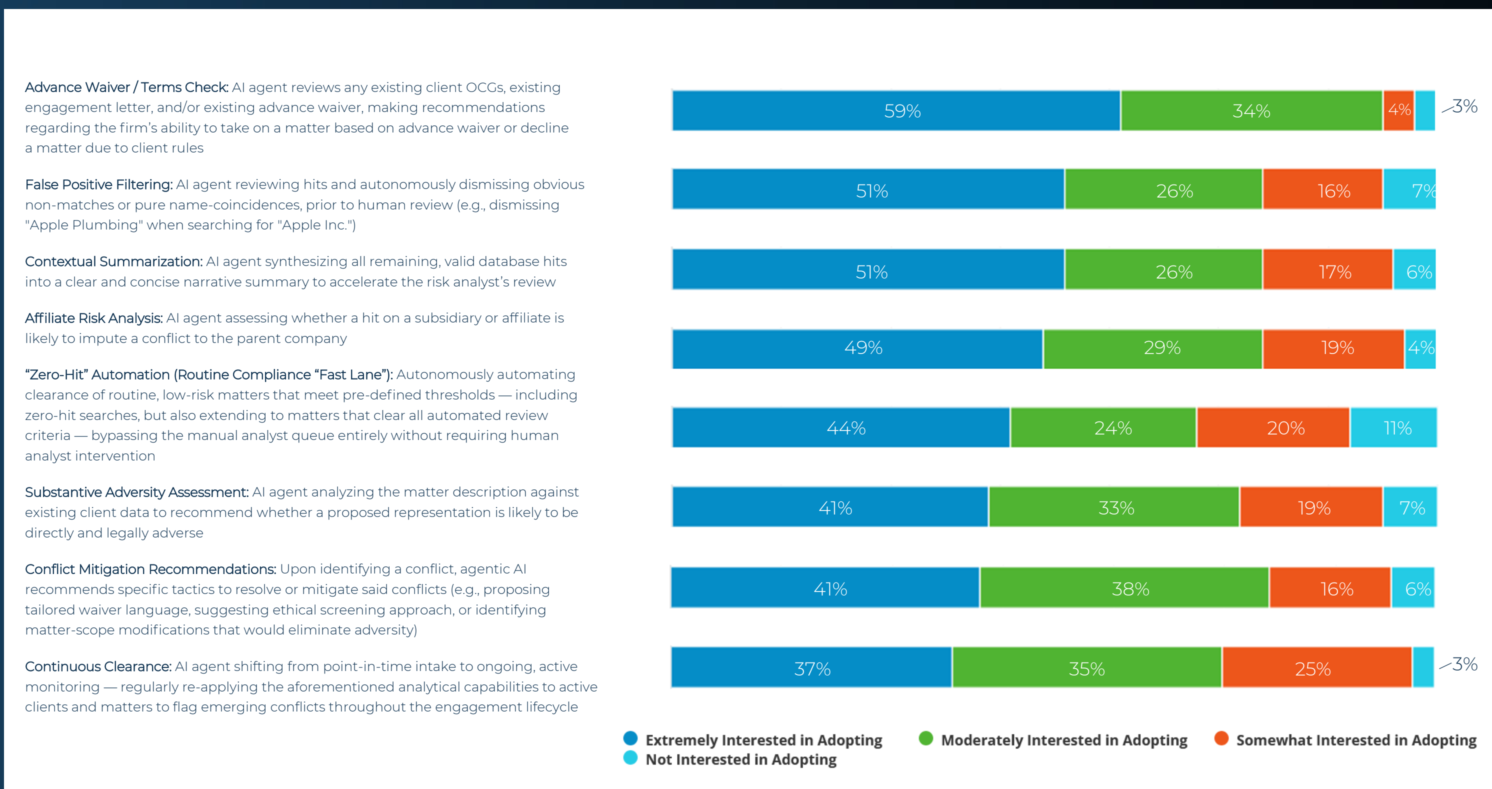
Ethical Wall & Information Barrier Management: Autonomously recommending the structure of required information barriers — including wall structure and affected lawyers/matters/systems that require screening — and, upon human approval, advancing those restrictions for deployment across firm systems; monitoring personnel and matter activity for changes that may require updated restrictions and alerting risk staff

AI-restrictive Wall Enforcement: Extending access controls to AI tools and agentic workflows, preventing screened personnel from surfacing restricted firm or matter data through AI assistants or automated agents



Question 5:

Which of the following agentic AI use cases for **conflicts clearance and reporting** would you be interested in adopting? [Multi-Select]



"These would be total game-changers."
[Office of the GC, 250-499 Lawyer Firm]

"Conflict report clearance. Use AI to review hits and determine conflicts based on ethics rules, OCG restrictions, engagement letters, internal firm policies."
[Risk Leader, 500-999 Lawyer Firm]

"We already implemented a 'zero hit' automation process."
[Risk Lawyer, 500-999 Lawyer Firm]

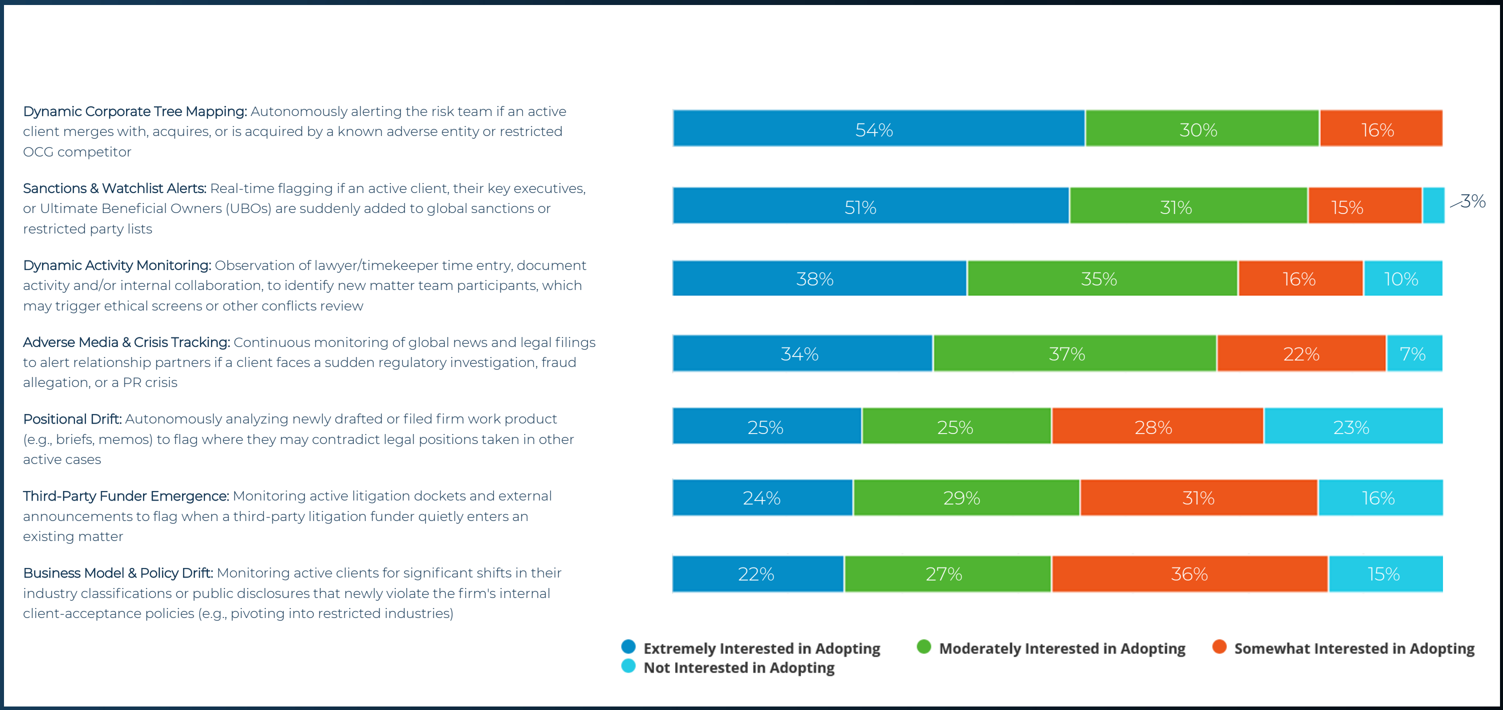
"We used an AI assisted conflicts search tool, but it became apparent that it was not aligned with the most time-consuming aspects of our workflow and ultimately extended the overall process rather than improve efficiency.

The majority of our effort is spent researching parties, validating results, and identifying true positive matches within the database. Determining whether a result presents potential issues is generally the more straightforward part of the analysis. As a result, the AI's focus on us teaching the database how to predict potential issues did not address the primary challenges our team faces.

A more valuable application of AI would be assisting with party research and true positive identification. Automating or enhancing those functions would likely generate far greater efficiencies than attempting to predict whether a potential issue exists."
[Risk Manager, 500-999 Lawyer Firm]

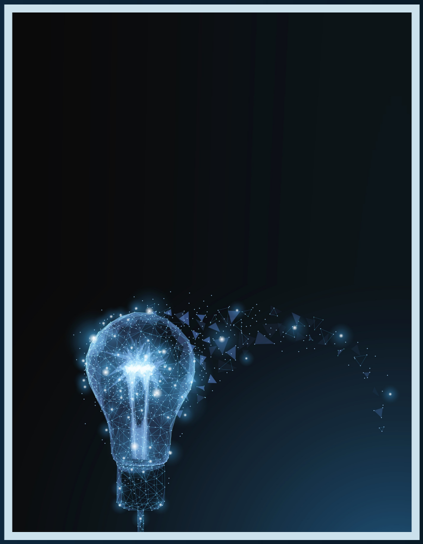
Question 6:

If your firm were to adopt a "Continuous Clearance" model — moving from point-in-time review during new business intake, to ongoing monitoring of active clients and matters — which of the following active-monitoring capabilities would you be interested in adopting? [Multi-Select]



Section 2:

Strategic and Commercial Considerations



Section 2: Observations

Section 2 focuses on use of agentic AI to support the strategic and commercial elements of client evaluation and engagement. Again, as seen across earlier findings, interest focuses on receiving objective data from a system to enable more informed human evaluation and action. Participants are more hesitant to encourage scenarios where software capabilities influence partner dynamics or attempt to automate subjective partner-level decisions too closely.

This dynamic is most pronounced in the strong interest in **insights distilled from Outside Counsel Guideline assessment, including terms alignment, the financial cost of terms compliance, and terms risk analysis**.

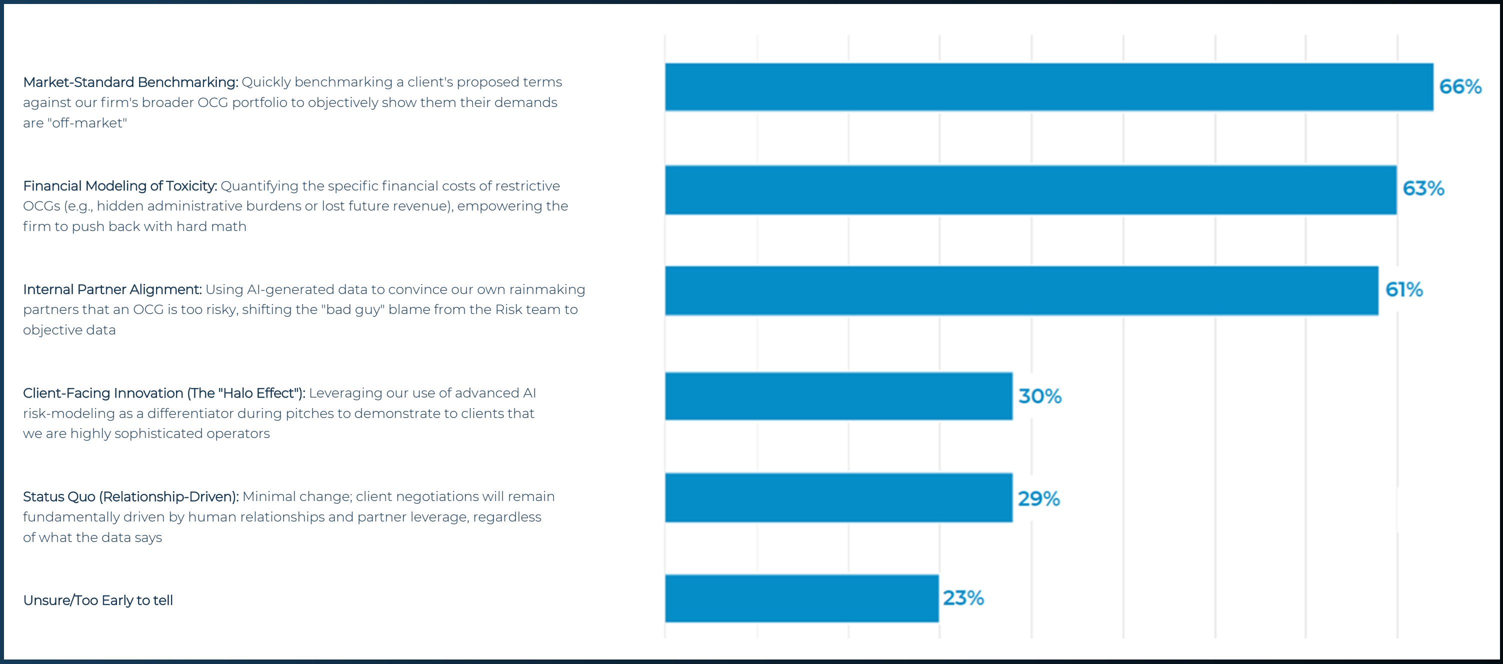
- **Data Insights That Empower Client Terms Negotiations** — Respondents rated proposed agentic AI capabilities that deliver market-standard benchmarking and financial modeling of OCG “toxicity” highest. Participants also expressed strong interest in receiving AI-generated data that supports internal negotiation” with rainmaker partners (e.g., shifting the “bad guy” blame in flagging unacceptable or high risk terms from the risk team to a more objective, rules-based system).

- **Evolving Risk into a “Growth Enabler” Requires Investment** — Only 2% of respondents indicated that no change is required to transform their firm’s risk and business acceptance functions into a strategic growth enabler. The majority of participants ranked adoption of innovative technology, better data integration, and cultural realignment as the top three requirements for enabling risk to better enable business growth.

Question 7:

How would you like to see agentic AI streamline or improve how your firm negotiates **Outside Counsel Guidelines (OCGs) and terms** with clients during intake?

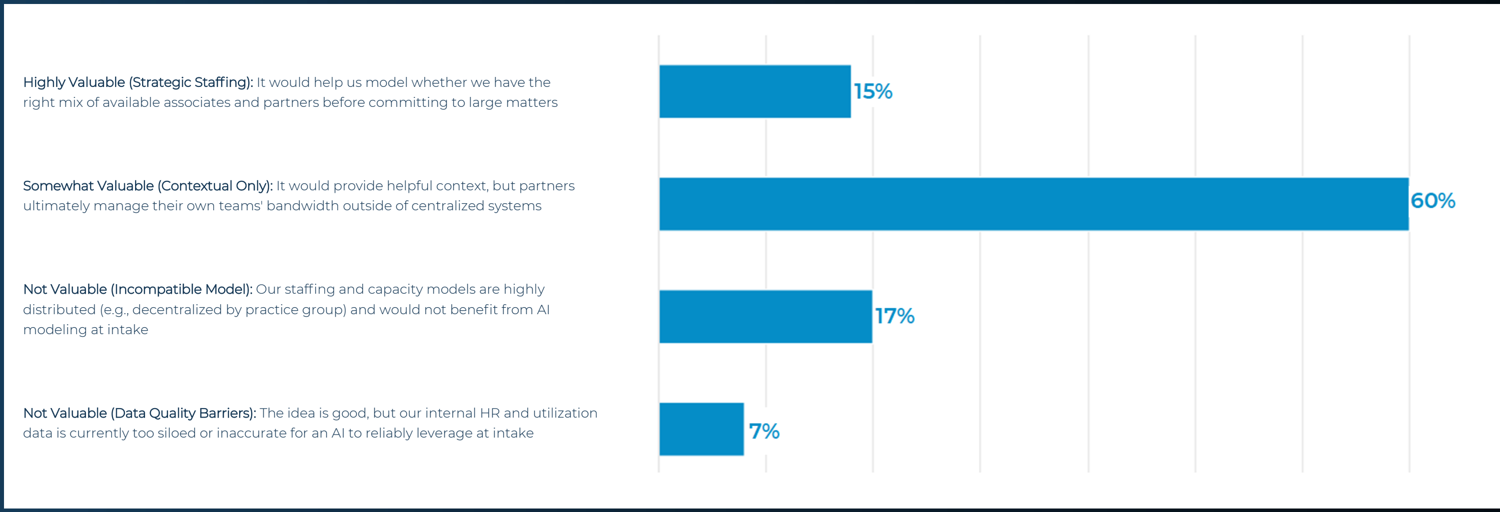
[Multi-Select]



Question 8:

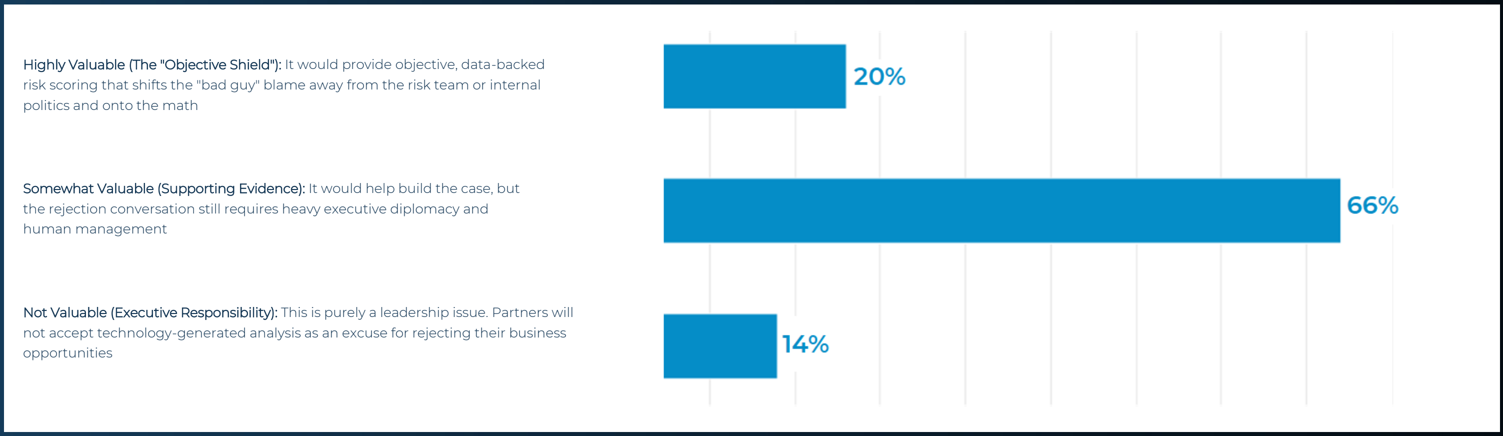
When evaluating a new matter, how valuable would it be for an agentic AI to execute **resource capacity and utilization checks** (e.g., cross-referencing matter profiles against timekeeping, Financial/PMS, HR, and experience databases)?

[Select One]



Question 9:

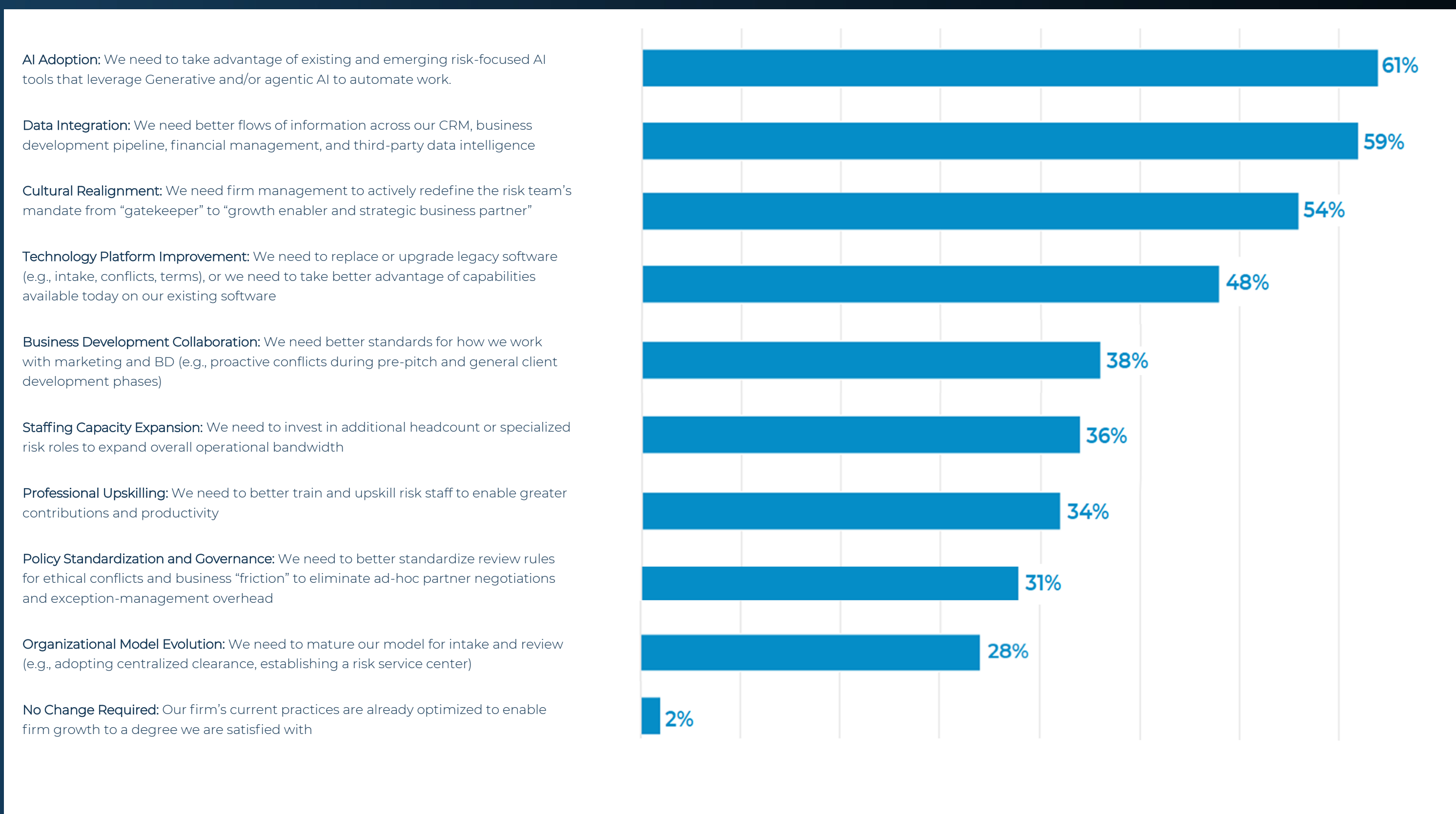
When navigating the **internal politics of rejecting a "problematic" client or matter,** how valuable would agentic AI analysis be in justifying that rejection to the originating partner? [Select One]



"The Agentic AI would act much like a consultant in that a consultant's take is often valued more than internal opinions."
[Information Governance Leader, 50-249 Lawyer Firm]

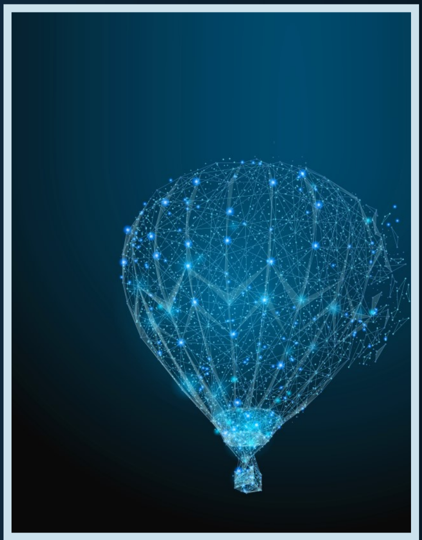
Question 10:

To transform your firm's risk and business acceptance function into **a strategic growth enabler for the firm**, which of the following changes, capabilities, or resources does your organization require? [Multi-Select]



Section 3:

Perceived Value, Concerns, Knowledge Gaps



Section 3: Observations

This section explores the benefits law firms expect from applying AI to risk management, the primary barriers and concerns surrounding AI adoption, and the internal and client-mandated safeguards firms require to establish trust in the technology.

While the promise of AI streamlining many resource intensive client intake operational workflows generates strong appeal, organizations are cautious and concerned about AI accuracy, governance, cost, and client compliance.

Similarly, as clients accept (or even mandate) firm use of AI, they also expect greater efficiency, lower costs, and stringent risk protections from firms.

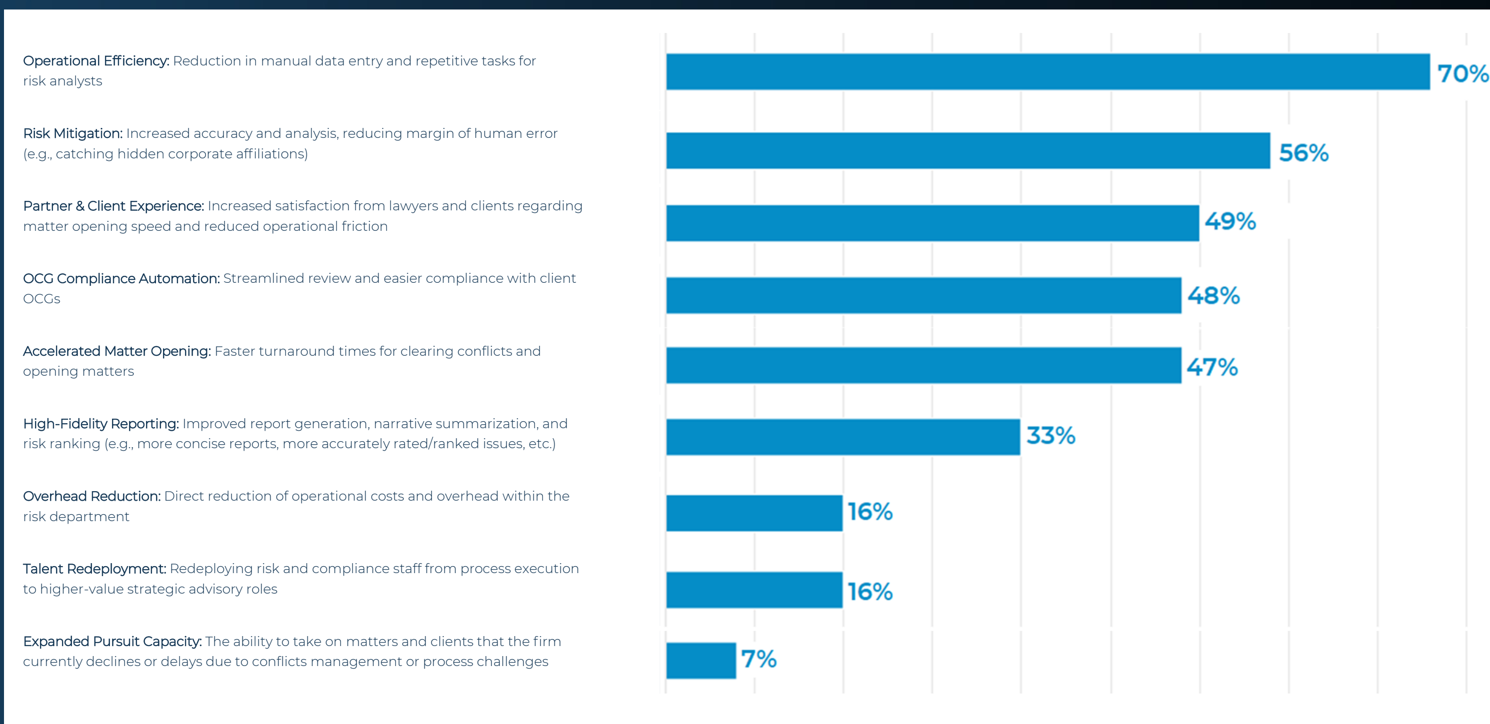
- Operational Execution Drives ROI — When rating potential benefits of AI, respondents overwhelmingly prioritize efficiency. This translates into expected benefits including reduced manual overhead, more accurate risk evaluation, and an improved experience for both lawyer and clients. Firms do not express strong interest in shrinking risk departments or shifting staff resources; instead, they seek higher productivity and expanded capability.

- Client Consent and Constraints Evolving to Accept AI — OCGs have evolved to address firm use of AI — both on matter execution, and for back office business operations like risk management. Increasingly, client rules exist on a spectrum. Rather than blanket "AI required" or "AI forbidden" guidelines, firms point to nuances including defined usage parameters. These requirements can include client disclosure, data privacy, human supervision, and explicit firm liability for error or breach.

- Features Can (and Must) Foster Trust — Firms express several common concerns about AI use, including accuracy, hallucinations, and liability associated with mismanaged risk. So it follows that they view features like supervisory oversight (Human-in-the-Loop review and analyst sign-off on any critical action) and transparency (auditable reasoning, detailed logs and source citation), and strict data privacy controls (ethical walls, zero data retention and no external model training) as key prerequisites for adoption.

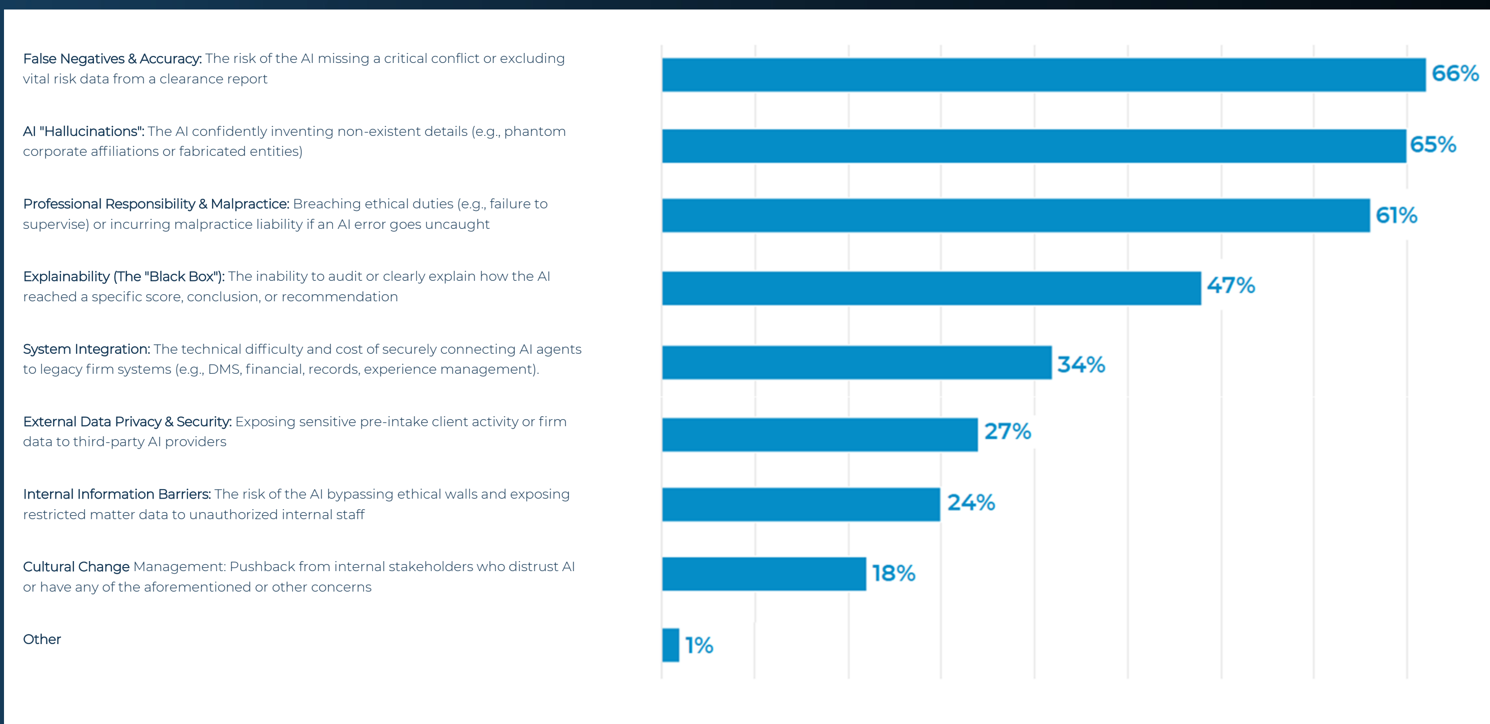
Question 11:

Among the following potential benefits of using agentic AI in **new business intake and conflicts management** processes, which do you consider most important for your firm? [Multi-Select]



Question 12:

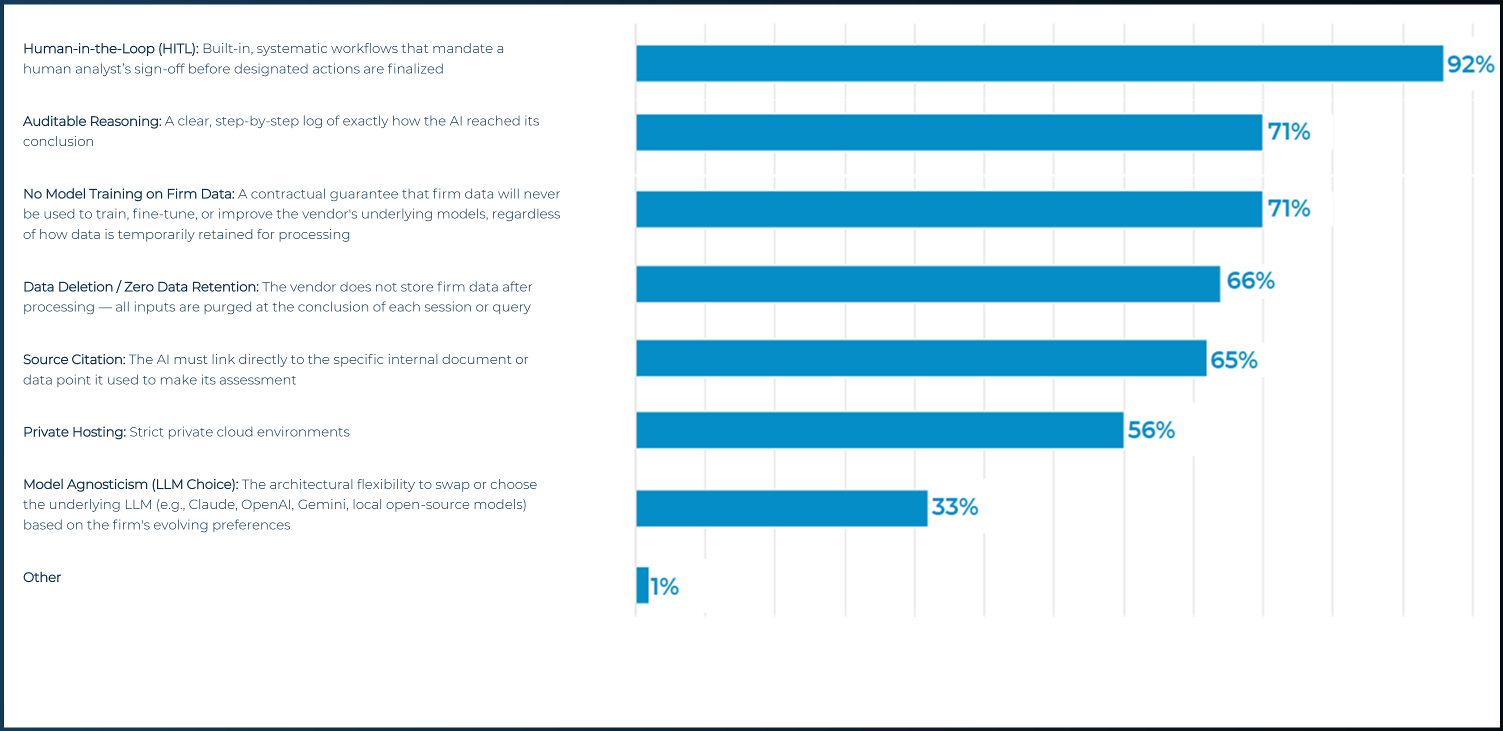
What are your primary concerns regarding the adoption of agentic AI to support **new business intake and conflicts management**? [Select Top Three]



"Costs (financial, environmental, cultural, social, cognitive) of adopting AI vs benefits. Time required to verify outputs."
[Office of the GC, 500-999 Lawyer Firm]

Question 13:

When evaluating an agentic AI solution for Intake and Conflicts, which of the following features are **absolute "must-haves" for your firm**? [Multi-Select]



"Integrate into all the systems we use for our day to day tasks."
[Risk Lawyer, 500-999 Lawyer Firm]

Question 14:

In the context of utilizing agentic or generative AI to support **client evaluation, conflicts, and new business intake**, what are the biggest "unknowns" for you and your firm right now?

Please specify what you feel you don't know but need to know before adopting these technologies (e.g., regulatory issues, insurer perspectives, data governance, technical infrastructure needs, peer success stories, ROI metrics, etc.)

Theme: Trust & Reliability

"How well AI will work and reliability without hallucinations or missing important information."
[Risk Leader, 1000+ Lawyer Firm]

"How to develop strong quality-control/human supervision over what the Agent does."
[Office of the GC, 1000+ Lawyer Firm]

"Success and accuracy of the AI support, data governance, and technical infrastructure needs."
[Risk Manager, 500-999 Lawyer Firm]

"Hallucinations / missed hits or connections."
[Risk Staff, 250-499 Lawyer Firm]

"Being able to ensure the client and/or adverse information received accurately reflects all parties in the matter, in addition to not wanting to question the validity of the information received."
[Risk Manager, 250-499 Lawyer Firm]

"Data governance and workflow models that actually work are the biggest concern. Gen AI that creates a response based on how a question is framed, rather than the actual facts of the answer is also a concern that requires human review."
[Risk Leader, 500-999 Lawyer Firm]

"Accuracy, reliability, cost, and firm adoption."
[KM Leader, 50-249 Lawyer Firm]

Theme: Costs & Budgets

"Costs relative to computing when using AI models and a trust that we aren't running up a massive bill for token usage or that is being kept from us by a Subscription model that is obfuscating true spend. The true concern is that in the future a tool will become unusable due to sky-rocketing compute cost, and the manual skills the researcher had developed as atrophied in that time."
[Information Governance Staff, 500-999 Lawyer Firm]

"COST especially if a token-based model is adopted. This will be very difficult to predict and budget for not knowing how many tokens will be consumed as part of the process."
[Risk Leader, 1000+ Lawyer Firm]

"Costs (financial and other) of adopting AI vs measurable positive benefits of doing so. Verification of accuracy."
[Office of the GC, 500-999 Lawyer Firm]

"Cost predictability - and getting locked into a technology that will be obsolete in 6 months remains a high hurdle. A paralyzing hurdle in some cases."
[Office of the GC, 50-249 Lawyer Firm]

Question 14 (Continued):

Theme: Peer Validation

"Peer success stories, ROI metrics. Tools and proposed processes in general. I don't know what I don't know."
[Risk Manager, 250-499 Lawyer Firm]

"User acceptance - lack of knowledge or use experience by attorneys, so trust of AI is low. How are attorneys being educated and informed on AI use beyond 'horror stories' of judicial sanctions and threats of hallucinations?"

"Peer success stories."
[Technology Strategy Manager, 1000+ Lawyer Firm]

"We are not sure where to start or what exactly we want at this time."
[Risk Lawyer, 500-999 Lawyer Firm]

"What's available to us, what is emerging as a reliable, safe tool (peer success stories)."
[Office of the GC, 250-499 Lawyer Firm]

Theme: Technology & Data

"Data and information governance, technical infrastructure needs, peer success stories."
[Risk Staff, 50-249 Lawyer Firm]

"Where to start. What tools I should be looking at. We've invested so heavily in client-facing tools and not at all in the NBI and business acceptance tools. The 'cost-center' tools are not on the radar of our innovation heads."
[Office of the GC, 250-499 Lawyer Firm]

"Technical infrastructure needs - our current AI tools do not integrate with our InTapp system which makes it more difficult to use in some cases. Additionally, finding the time to use the AI tools we do have to our advantage."
[Risk Lawyer, 500-999 Lawyer Firm]

"The biggest unknown for our firm is not necessarily whether AI can help solve client intake, conflicts, and new business challenges, but rather our awareness of what solutions already exist. The marketplace is evolving so rapidly that it is difficult to know what capabilities are currently available, what is in development, and which tools can REALISTICALLY address the operational, risk, and efficiency challenges we face. The challenge is often identifying the right solutions and understanding their true capabilities, limitations, and integration potential within our existing processes."
[Risk Leader, 1000+ Lawyer Firm]

"Technical infrastructure needs - do we have the set up we need? Do existing tools integrate easily?"
[Operational Leader, 50-249 Lawyer Firm]

"How much do we need to clean up our data before implementation? What are the technical infrastructure needs?"
[Risk Lawyer, 1000+ Lawyer Firm]

"Whether are systems are compatible with these new tools."
[IT Manager, 1000+ Lawyer Firm]

"Data governance - if the data isn't good to start, then the information AI gives back will be based on bad data. Also —client requirements re: AI that have been previously agreed to and may be poorly drafted (such as those requiring informed consent for the use of any AI — which would include the DMS and Outlook)."
[Risk Leader, 50-249 Lawyer Firm]

"Data integrity and integration."
[Risk Lawyer, 1000+ Lawyer Firm]

"Data governance and security."
[Risk Manager, 1000+ Lawyer Firm]

Question 14 (Continued):

Theme: Risk & Regulations

"When/whether it is going to become generally accepted (by courts, bars, clients, ethics committees, firm management) to allow AI to make conflicts determinations (with human supervision)."
[Office of the GC, 1000+ Lawyer Firm]

"Regulatory issues, client consent, technical infrastructure needs, ROI metrics, privacy from vendors."
[Information Governance Staff, 1000+ Lawyer Firm]

"Accuracy, auditability, and insurer perspective."
[Risk Leader, 1000+ Lawyer Firm]

"Regulatory ambiguity. Different jurisdictions providing ambiguity in how to approach AI creates death by a thousand cuts and often leads to having to play to the strictest regulatory approach which can be difficult to clear."
[Office of the GC, 50-249 Lawyer Firm]

"Accuracy, insurer perspectives, cultural / change management challenges."
[Office of the GC, 500-999 Lawyer Firm]

Theme: HR Impact

"What impact it might have on headcount and how to best position folks who will lose their jobs so they can be retrained (in AI, probably)."
[Office of the GC, 1000+ Lawyer Firm]

"[W]hether it can allow for headcount reduction, and how accurate it is."
[Risk Staff, 1000+ Lawyer Firm]

Question 15:

Over the past 12 months, how have your clients' Outside Counsel Guidelines (OCGs) evolved regarding your firm's use of AI for internal operational matters?

Note: Please focus specifically on AI in business operations (risk, intake, finance), rather than AI used in legal service delivery / practice of law (brief drafting, document review)

Theme: Client Encouragement

"Most clients have rapidly shifted from 'you cannot use AI in connection with our work' to 'you must use AI in connection with our work (as long as its safe).'"
[Risk Lawyer, 1000+ Lawyer Firm]

"More expectations of use while limiting use to specific functions."
[KM Leader, 50-249 Lawyer Firm]

"Most have required permission, disclosure of what tool, what it will be used for. Some 'require' it but require the firm to indemnify the client for any AI errors. The most recent ones have tended to be less specific."
[Office of the GC, 250-499 Lawyer Firm]

Theme: No or Mixed Change

"We are not seeing much activity in our OCGs relating to our internal use of AI in our business operations."
[Office of the GC, 250-499 Lawyer Firm]

"They haven't really changed."
[Risk Leader, 1000+ Lawyer Firm]

"Not a significant concern - most AI restrictions we see relate to legal service delivery."
[Office of the GC, 500-999 Lawyer Firm]

"No impact."
[Operational Leader, 50-249 Lawyer Firm]

"They are still all over the place. Some prohibit without specific approval; some encourage it but if something goes wrong, it is the lawyer's fault; some ask us to copy them with our policy and describe safeguards; some want it to reduce their cost only."
[Office of the GC, 250-499 Lawyer Firm]

"Many request notification of AI models being used. A few outright restrict use of AI and others require its use to gain efficiencies."
[Risk Leader, 1000+ Lawyer Firm]

Theme: Strong Restrictions

"Most OCGs contain wholesale prohibitions on the use of AI (in both work product and business operations) we push back on both - and note that AI in embedded in all tools (including Outlook, PowerPoint, etc.) we generally find that even the most AI-adverse clients will concede re: operations while maintaining that AI cannot be used in deliverables."
[Risk Leader, 1000+ Lawyer Firm]

"Yes - there is significant push-back, tied with greater client sophistication. Additionally, we see greater push-back on our Firm's use of AI as mentioned in our ELs. This is slowing down the signing of ELs."
[Office of the GC, 50-249 Lawyer Firm]

Question 15 (Continued):

Theme: Client Acceptance

"Over the past year, we went from less than ten clients with Artificial Intelligence clauses in their Guidelines to 45. Additionally, we went from zero clients requiring informed consent for the use of GAI to 27."
[Risk Leader, 50-249 Lawyer Firm]

"We've seen a turn away from prohibition for AI in OCGs and a push towards use of AI in OCGs. I think we've reached the moment where AI use is an expected technology implementation by clients -- though the jurisdictional rules lag behind that expectation in many ways."
[Office of the GC, 50-249 Lawyer Firm]

"Yes, more clients are open to the use of AI in law firm work product."
[Risk Lawyer, 250-499 Lawyer Firm]

"More client OCGs contain AI language, specifically requiring that we do no use their information to train AI and that our AI is secure. Many clients request us to disclose or only use certain AI. Additionally, more OCGs are identifying AI as a potential cost saving method for them in the results and solutions our firm presents."
[Risk Leader, 500-999 Lawyer Firm]

"Over the past 12 months, we have seen a significant shift in clients' Outside Counsel Guidelines regarding AI. Rather than broadly prohibiting its use, many clients now expressly permit the use of approved AI tools, provided appropriate governance, security, confidentiality, and human oversight safeguards are in place.

Increasingly, clients also expect outside counsel to use AI responsibly to improve efficiency and recognize that those efficiencies should be reflected in the delivery and cost of legal services."
[Office of the GC, 500-999 Lawyer Firm]

Theme: Usage Guidelines

"Ensuring human-in-the-loop for all AI pieces, risk compliance."
[Risk Staff, 50-249 Lawyer Firm]

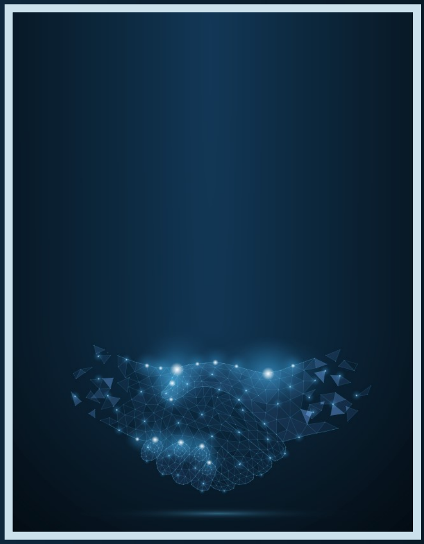
"Most now have extensive AI language prohibiting use or requiring approval before use. More recently I've seen quite a few asking a listing of all AI applications that the firm may use during the course of the engagement."
[Risk Leader, 500-999 Lawyer Firm]

"Yes; many specify consent is required prior to utilizing any AI feature and are outlining what can be."
[Risk Manager, 250-499 Lawyer Firm]

"Many clients restrict AI and/or impose ALL risk and liability of doing so on firm, including responsibility for underlying features of AI such as know potential bias, inaccuracy, which the firm does not have complete or any control over."
[Office of the GC, 500-999 Lawyer Firm]

Section 4:

Human Capital, Reskilling, and Organizational Impact



Section 4: Observations

Section 4 explores current sentiments among risk leaders and operational practitioners regarding the potential impact of AI on risk department staffing. As AI delivers efficiency and capability gains, it naturally raises questions about future changes to staffing levels, staff functions, and staff skill requirements.

Generally, both leaders and staff express **cautious optimism about the future impact of AI on their personal livelihoods, their ability to retain and adapt their roles.**

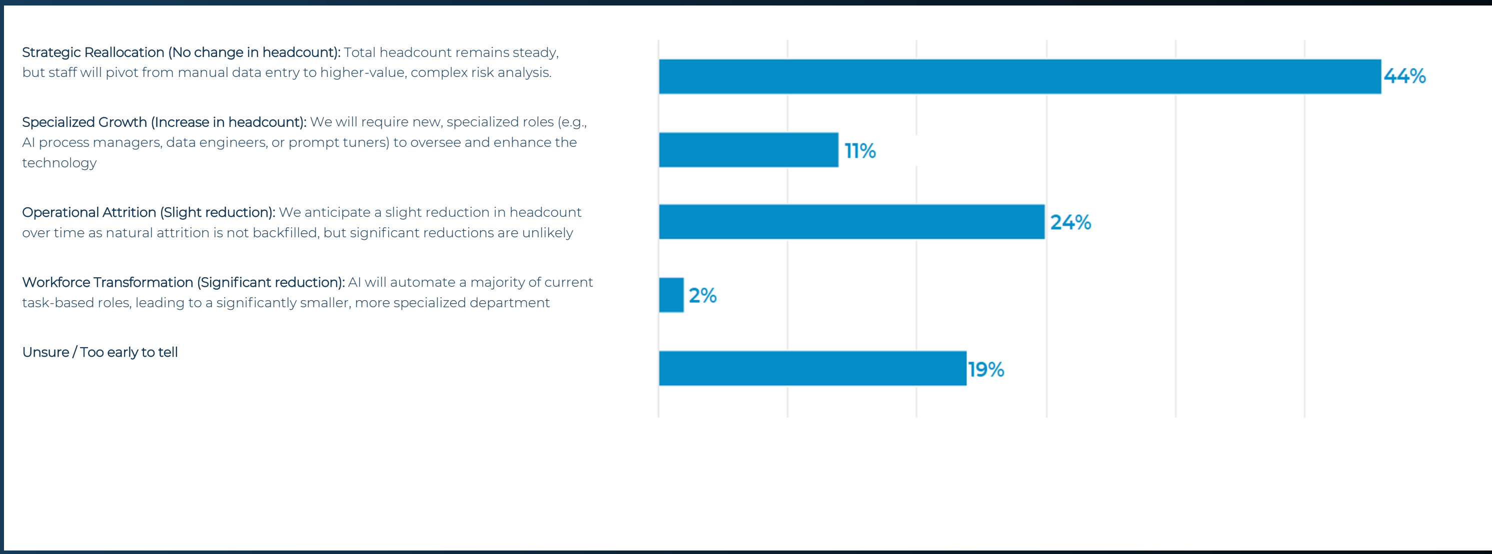
- Risk Leaders Envision Reallocation Over Reduction — To the extent AI presents opportunity to shrink staff workloads, most firms envision shifting staff roles and responsibilities over reducing headcount. Instead of eliminating positions, firms intend to redirect staff toward higher-value analysis and assessment tasks, leveraging AI augmentation to automate data entry and routine process execution.

- Risk Staff Report Mixed Sentiments — Notwithstanding internal anxieties, survey findings indicate that operational staff remain cautiously optimistic regarding AI capabilities, their evolving job functions, and long-term employment stability.

Question 16:

Over the next 3–5 years, how do you anticipate the successful adoption of agentic AI will impact the headcount and structure of your NBI / Conflicts team?

[Select One]



"I anticipate relatively stable headcount, but a meaningful shift in skill sets and responsibilities. Agentic AI will likely reduce manual, repetitive work, allowing professionals to focus on higher-value analysis, risk assessment, and oversight. Success will depend on developing teams that can effectively manage and validate AI tools while applying human judgment to complex conflicts and intake decisions."
[Risk Leader, 1000+ Lawyer Firm]

"The real answer is that we don't know because we have no idea of the most cost effective way of implementing the tools in question six months from now. If compute costs plummet, it's a very different story, but if they remain the same, it's hard to say how much of this can actually be implemented cost-effectively."
[IG Staff, 250-499 Lawyer Firm]

"It could be too early to tell."
[Risk Manager, 250-499 Lawyer Firm]

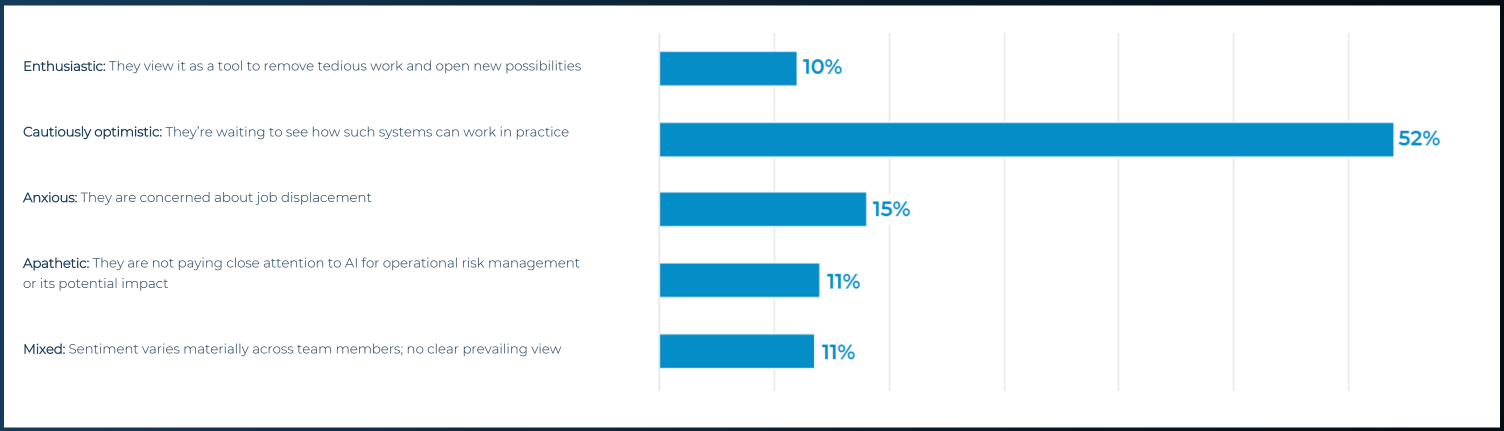
"Operational attrition will start this coming fiscal year I think. After that, it's just a question of when we will reach workforce transformation, not whether, and I think it's 90% likely we do within the next five years."
[Office of the GC, 1000+ Lawyer Firm]

"I think the attrition would be more likely on the data entry and analysis side rather than on the conflict attorney side."
[Office of the GC, 250-499 Lawyer Firm]

"Probably somewhere between attrition and transformation. Our department has a lot of junior people, and I am not sure if there will be much for them to do if the AI agents are as good as advertised."
[Risk Staff, 1000+ Lawyer Firm]

Question 17:

How would you characterize the current sentiment among your NBI and Conflicts staff regarding the introduction (or potential introduction) of AI into their workflows? [Select One]



"Some are excited for the advancements and others are concerned with job loss, or the consequences of using AI to the environment and communities."
[Risk Leader, 500-999 Lawyer Firm]

"The analysts are anxious. The conflicts attorneys are cautiously optimistic."
[Risk Lawyer, 500-999 Lawyer Firm]

"It can be a very useful tool in course of this work if it delivers one what it's meant to. However, it's also important that management knows the limitations of the tech. IE — it can replace researchers. It does not automate complex intellectual functions, and it isn't a thinking intelligence."
[Information Governance Staff, 50-249 Lawyer Firm]

"AI use internally for our conflicts process is not a priority for the Firm's innovation team. Consequently the conflicts team is not worried about attrition. However, they are interested in any process that can remove the manual input of data or make it less time-consuming. We just don't have tools on the horizon to do this."
[Office of the GC, 250-499 Lawyer Firm]

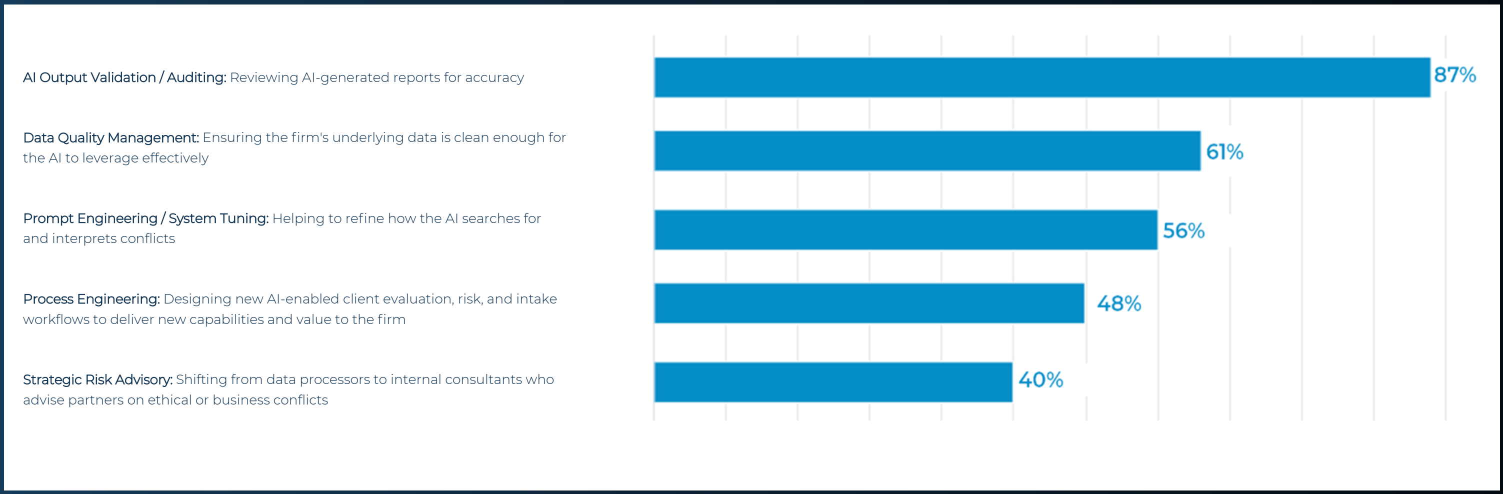
"Concerns about quality of the AI output."
[Risk Leader, 1000+ Lawyer Firm]

"I'm actually guessing, here. We may have a distinction between 'lifers,' the people for whom this is going to be a career, and the other folks who are working here for a few years to get law firm experience before law school or grad school."
[Office of the GC, 1000+ Lawyer Firm]

"I think some people are anxious. I am a senior person and I'm a little anxious, but also hopeful. If it can make our lives easier, great. But I have no illusions: if it can replace us for less money, Firms will ultimately make that decision."
[Risk Staff, 1000+ Lawyer Firm]

Question 18:

If agentic AI takes on "first-pass" conflicts review and more routine data entry activities, which new skills will become most critical for your human workforce to develop? [Select Top Three]



"Would prefer if the reality was "Strategic Risk Advisory", but current landscape suggests too early for that. AI tool deployment requires significant, ongoing and often tedious, management, supervision."
[Office of the GC, 500-999 Lawyer Firm]

Section 5:

Future Outlook & Readiness

Section 5: Observations

This section outlines the technical requirements, perceived barriers, and projected timelines for firms to successfully adopt agentic AI for risk management operations.

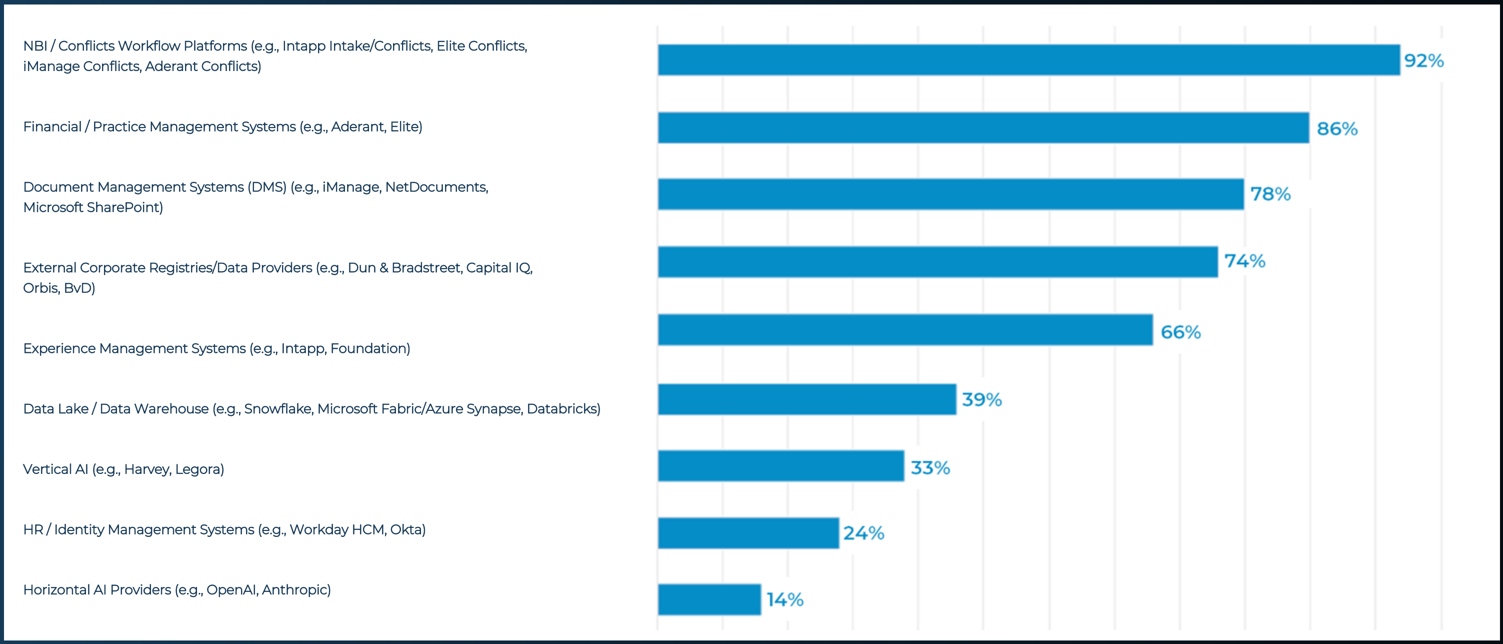
- AI Adoption Accelerating — Over two-thirds of respondents expect agentic AI to become a standard element of intake and conflicts workflows within three years, with 15% seeing adoption within the next twelve months.

- Real Requirements — Firms see system integration as critical requirements for success. agentic AI must integrate seamlessly with existing risk workflow systems, and it must connect effectively with financial / practice management systems, document management systems, and third-party data services.

- Data Quality Barriers — Asked to identify the *top* barrier to adoption, the most-cited single issue firm identified is poor data quality. However, significant segments of respondents named internal resource availability, budget constraints, or security and compliance issues as the most critical challenges.

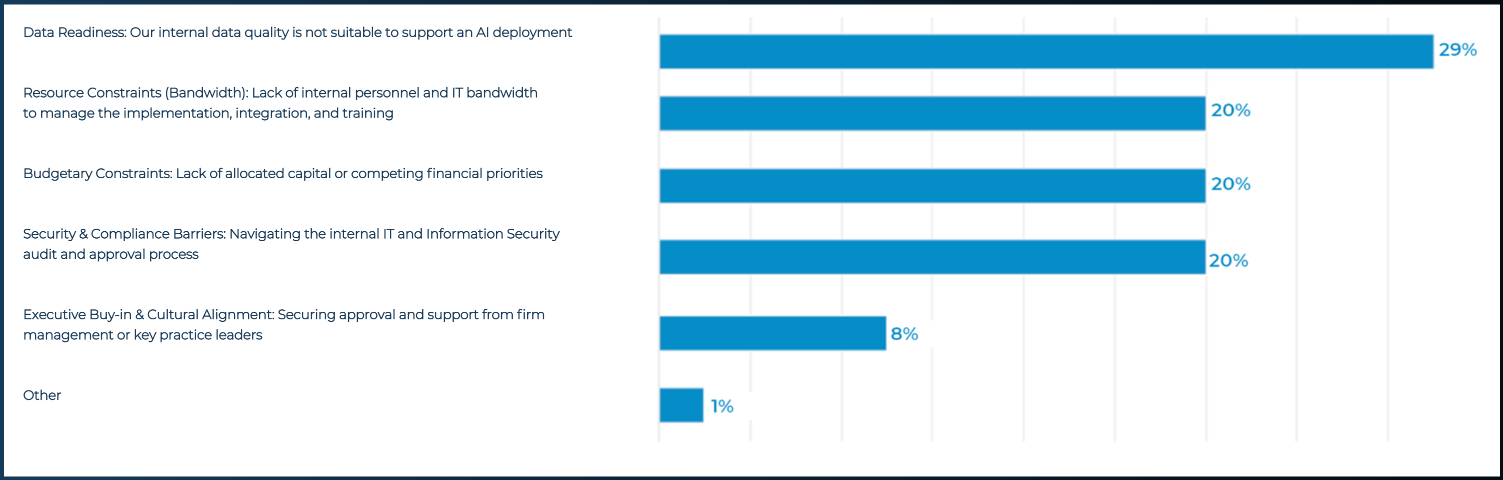
Question 19:

To successfully adopt agentic AI for new business intake and related risk management, with which existing systems must the technology effectively integrate? [Multi-Select]



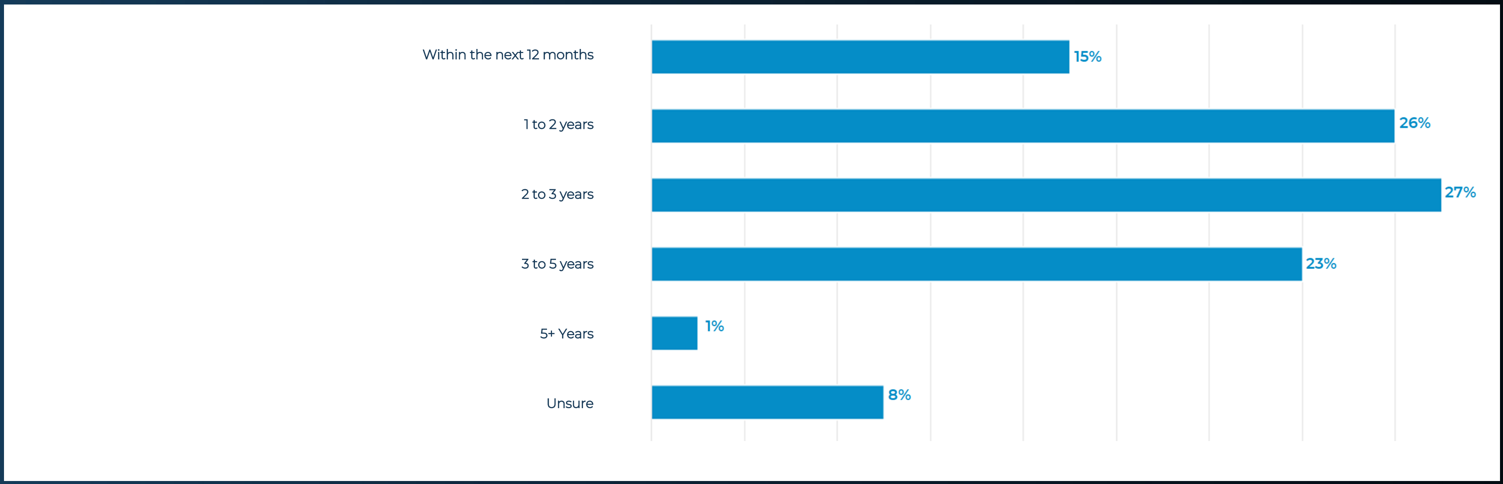
Question 20:

If a vendor offered a fully secure, highly accurate agentic AI solution for NBI tomorrow, what would be your single biggest internal hurdle to adopting and deploying it? [Select One]



Question 21:

Looking ahead, when do you realistically expect agentic AI to be a standard, trusted component of your firm's NBI and Conflicts workflow? [Select One]



"While it may not necessarily be AI, we have a few automated conflicts and client-related workflows that we expect to roll out in a few months."
[Risk Manager, 500-999 Lawyer Firm]

"We need to move intake and conflicts to the cloud to leverage AI opportunities. Project will start later this year."
[Risk Leader, 500-999 Lawyer Firm]

"We haven't started this process at all yet so it seems lightyears away to me now. We have an Intapp Intake / Conflicts upgrade on the calendar for 2027/2028 so hopefully after that it could move quickly."
[Risk Staff, 50-249 Lawyer Firm]

Conclusion

This concludes the 2026 AI and Agentic Workflow Survey Report.

To provide feedback on this exercise, to indicate interest in a 2027 follow up survey or suggest other areas of risk research, or to connect generally on all things risk, please feel free to reach out: dan@meridi.us.

To read ongoing risk updates, covering topics including law firm risk management trends, challenges, conflicts news, compliance, technology, information security, professional responsibility, ethics & more, please visit: www.BresslerRiskBlog.com and sign up for email updates.

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Chief Operating Officer, Richards, Layton & Finger

"Great news — we found a wonderful candidate. Thanks for your help circulating the position!"
Conflicts Counsel, Moore & Van Allen

"We received many great candidates!!"
Senior Director, Risk Management, Kirkland & Ellis LLP