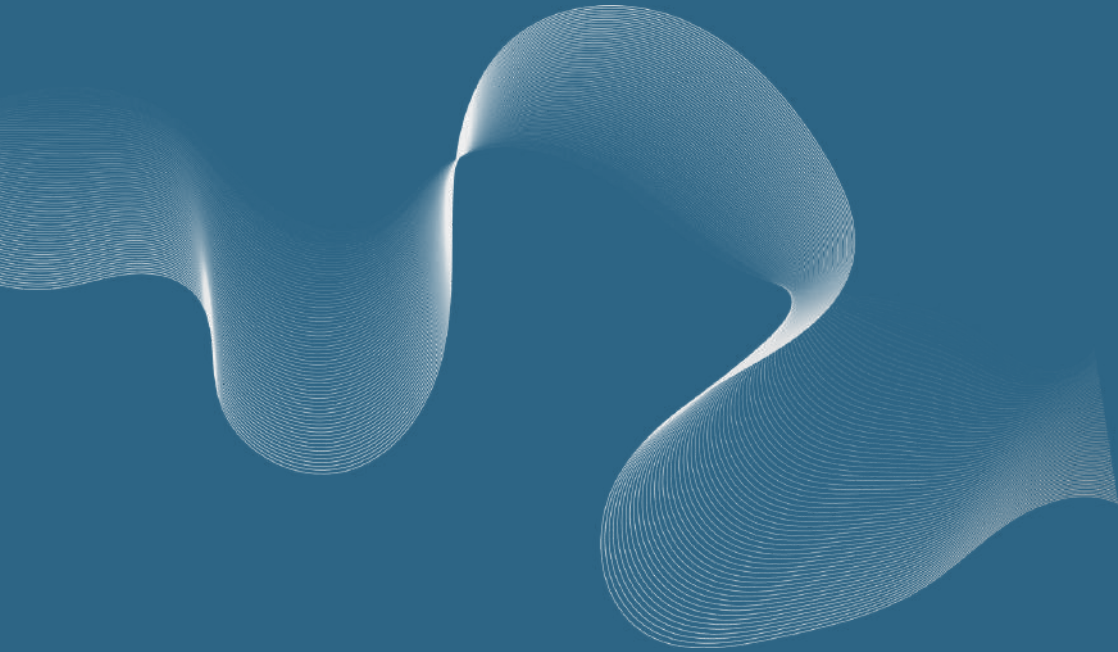




THE LEGAL
INNOVATION
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CONTEXT-FOCUSED LEGAL WORKFLOWS: REDUCING FRICTION AND UNLOCKING VALUE WITH DATA AND AI

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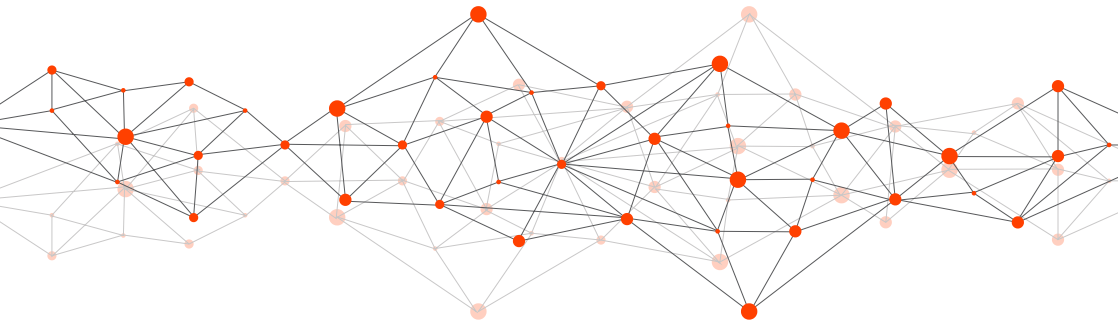


HARNESSING DATA

Legal Departments often sit on a wealth of valuable data, scattered across systems, contracts, emails, intake tools, and past decisions, yet much of it remains underutilized and difficult to harness for meaningful business value.

In a recent [Legal Innovation Forum Webinar](#), [From insight to impact: Harnessing data and AI to enrich legal workflows](#), we explored some of the most pressing challenges facing legal departments, and examined how agentic AI tools can solve pain points by reducing friction and surfacing institutional data to bring context to legal workflows.

Our speakers discussed a prevailing education gap that still lingers around the use of AI in organizations, which presents challenges for in-house counsel as they strive to introduce new AI tools.



They also dived into the importance of understanding the specific needs and goals of the team before investing in a new tool. For example, at California-based code intelligence platform Sourcegraph, the legal team tested three different iterations of a legal intake tool before finding the one that worked for them.



Lily Schurra,
Senior commercial counsel at Sourcegraph

“That’s where I think this ease of building is so powerful, because if we had started that DIY build situation that I developed there by saying ‘let’s just go buy a tool’, we would have bought something we were unhappy with, and not quite figured out why we were unhappy,” said **Lily Schurra, senior commercial counsel at Sourcegraph.**

However, as legal departments contemplate the buy Vs build debate, they should also consider the risks in building their own code, noted **Jessica Nguyen, chief strategy and legal officer at North American AI-native company Sandstone.** While building may be faster and easier initially, it may cause more problems in the long run.

“Shouldn’t IT be thinking about what are all the risks associated with building your own tech?” asked Nguyen. “I think they’re forgetting all those risks, like, who’s gonna maintain the code? What happens when there’s a bug? Is that self-built code actually gonna meet your various security requirements and pass a SOC audit? Probably not.”



Jessica Nguyen,
Chief Strategy and Legal Officer at Sandstone

Nguyen suggested thinking about which **stage of adoption your organization is striving for when looking into legal tech tools,** with phase one being early experimentation and consumer use, and phase two being AI to solve a specific challenge such as contract redlining, research, or summarization. Sandstone offers phase three by harnessing metadata from across the enterprise.

“We are the future of legal technology,” said Nguyen. “We are going to be phase one, phase two, and phase three, which is this contextual layer of being able to absorb all of the information coming from these enterprise systems that are not going to go away.”

PROVIDING VALUE THROUGH JUDGEMENT

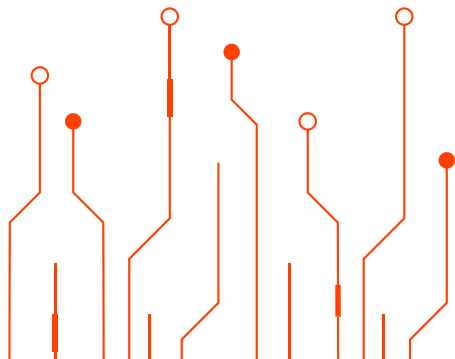
AI offers in-house counsel the opportunity to step up and play a broader role within the organization. **Kevin Keller, SVP, general counsel at California-based enterprise software company Forward Networks** commented that **in-house counsel bring a unique value to the organization by combining a thorough knowledge of technology with a deep understanding of legal practice, allowing them to offer a nuanced judgment in the way AI is used.**



Kevin Keller,
SVP, General Counsel at Forward Networks

“You hear a lot of talk about where the real value in a legal team comes from — whether it’s an in-house general counsel and team or a law firm — and the discussion lands with judgment,” said Keller. “When you think about what judgment is, judgment is applying reason with context, and so without the context, you really can’t have the thing of value.”

In-house counsel can really set an example to the rest of the company as they test and use AI tools from their standpoint as “deep knowledge workers,” Keller added.





ENTERPRISE COLLABORATION

Schurra has spent a decade training sales and products teams about the role of the legal department and how best to communicate with legal. Sales teams in particular often harbour a fear of legal, and don't always understand what context is meaningful to the team, Schurra noted.

"I think there's a really powerful way to take us further as legal teams, gathering that context in a new way," said Schurra. **"There's a way that we can all work together as a full enterprise, understanding the goals behind the deal, for example, why we're trying to accomplish XYZ thing, the goal behind the product we're building, etc, and turn it into really powerful knowledge that drives us forward."**

Schurra uses agentic AI to filter through her complex notes and translate it into something that can be easily articulated to other teams across the business, for example.

Nguyen agreed that an opportunity lies with legal departments and legal operations functions to support business teams.

"By being that omniscient, cross-functional contextual layer across all the various functions — marketing, sales, customer success — we become a de facto project manager and process manager for other teams as well," said Nguyen.

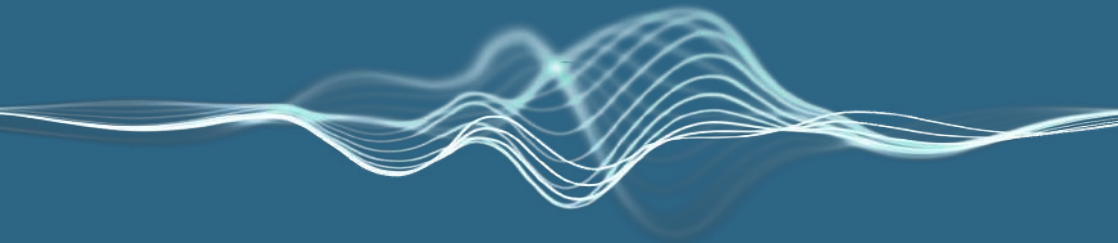
HUMAN IN THE LOOP

While more legal departments are starting to implement agentic workflows to lower friction, concerns have also been raised around autonomous processes. Nguyen recommended starting with the low-hanging fruit, and using agentic AI to handle low-stakes tasks such as intake, triage and administrative work – not the high-stakes work that requires human judgment and legal advice.

The role of a legal ops manager will subsequently evolve to manage those agents and make sure that the policies and context behind them stay accurate, Nguyen noted.

Our speakers agreed that keeping a human in the loop will always be essential.

“This idea that lawyers are going away; I just don't think it's ever gonna happen,” said Schurra. “There's something there about what we've learned that enables us to be really powerful business partners but that superpower in your brain that triggers when you see something is only fed by the right kind of context, the right kind of information, and made more powerful and scalable by automation, which is done with agentic AI.”



CONCLUSIONS

As legal departments continue to navigate increasing complexity and expectations, the opportunity lies not in the volume of data available, but in the ability to surface and apply the right context at the right time. **As highlighted by our speakers throughout the discussion, AI and agentic workflows are not replacing legal judgment — they are enhancing it by reducing friction, connecting fragmented information, and enabling more informed decision-making across the enterprise.**

Ultimately, the future of legal operations will be defined by how effectively teams combine data, technology, and human judgment to create a more context-focused connected, and value-driven legal function.



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