

# Optimizing Your Legal Function in 2026

*A practical, comprehensive playbook for General Counsel, Heads of Legal, and Legal Ops leaders*



## How to use this document

*This is a working playbook, not a piece of thought leadership. It is designed to be used, marked up, challenged, and adapted.*

You should be able to read this document and clearly understand where your Legal function is struggling to scale, why those problems exist, and what to do about them. The intent is not to inspire incremental improvement, but to help you deliberately design how Legal operates in an environment of increasing demand, limited headcount growth, and embedded AI.

You can read the document end to end, or jump directly to the section that reflects your most pressing constraint.

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## Part 1

# The problem Legal is actually facing

**Legal is scaling whether you like it or not.** Business velocity continues to increase, Legal demand grows year on year, and headcount does not scale linearly. At the same time, AI has already entered Legal workflows, often without a clear operating model around it.

**Legal will scale. The only real choice is whether that scale is intentional or accidental.**

When Legal does not scale deliberately, the same failures appear across organizations. Legal outcomes become inconsistent, risk tolerance drifts over time, decisions are repeatedly re-litigated, and Legal is perceived either as a blocker or as a rubber stamp. These symptoms are not caused by lack of effort or talent. They are design failures.

Adding more people or more tools does not resolve this. In many cases, it simply accelerates the dysfunction.

The underlying issue is structural. Legal was never designed to scale. Traditional Legal operating models assume expert judgment applied to relatively low volumes of work, with clear ownership and slow feedback loops. None of those assumptions hold true in 2026.

## Part 2

# The identity shift Legal must make

**Most Legal teams still operate as advisory functions.** Advisory models centralize judgment, create bottlenecks, and fail under sustained demand. They work when volume is low and decision-making can be tightly controlled. They break when Legal becomes embedded in high-velocity business operations.

### Legal sees itself as:

- A legal advisor
- A risk checker
- A support function



### To scale, Legal must be:

- A business enabler
- A decision system
- A force multiplier for the organization

Enabling models operate differently. They distribute decision-making, encode Legal judgment into systems and workflows, and move at the speed of the business while maintaining appropriate control.

This is not about reducing Legal involvement or lowering standards. It is about increasing leverage.

Before Legal can optimize how it works, it must redefine what it is. Legal cannot scale as a reactive, downstream reviewer. To operate effectively at scale, Legal must function as a business enabler, a decision system, and a force multiplier for the organization. This identity shift underpins every design decision that follows.

## Part 3

# Aligning Legal to the business

**Legal cannot design itself in isolation.** Any attempt to optimize Legal without reference to business strategy will result in misalignment and wasted effort. Alignment starts by answering four foundational questions, in order.

1

**Where is the business going?** This includes growth plans, geographic expansion, product strategy, risk appetite, and operating cadence.

2

**Where should Legal be going to support that direction?** This is where Legal defines its mission and vision in concrete terms, rather than abstract statements about partnership.

3

**What should Legal be doing to support that direction?** This forces clarity around priorities and trade-offs.

4

**How should Legal be operating to deliver on those priorities?** This is where operating model design begins.

These answers provide the context required to design Legal systems that actually support the business.

## Part 4

# The 5+1 Framework

**The 5+1 Framework provides a practical structure for designing Legal to scale.**

The five core pillars address how work flows through Legal, how decisions are made, and how judgment is captured and reused. The additional pillar recognizes that none of this works without deliberate change management.



## Part 5

# Legal Resourcing

Legal resourcing starts with a simple but uncomfortable question: what work truly belongs in Legal, and what does not?

High volume	<b>Use AI / Outsource</b> <i>(e.g. routine contracts)</i>	<b>Build competency within your team, augmented by AI</b> <i>(e.g. strategic partnerships, business advisory)</i>
Low volume	<b>Insource to business, supported by AI</b> <i>(e.g. DSARs, marketing queries)</i>	<b>Use law firm</b> <i>(e.g. complex litigation, IP disputes, M&amp;A support)</i>
	Low risk / complexity	High risk / complexity

Too many Legal teams default to absorbing work simply because it has legal elements. Over time, this creates unsustainable demand and prevents Legal from focusing on high-impact activities.

## Part 5 (cont.)

Work Type	Recommended Approach
High-volume, low-risk	Push to business with clear guidance and AI support (e.g., routine DSARs, standard marketing queries)
High-volume, moderate complexity	Combination of AI and outsourcing (e.g., routine commercial agreements)
Lower-volume, higher-risk	Internal Legal team with selective AI augmentation (e.g., strategic partnerships, complex negotiations)
Highest-risk, lowest-volume	External counsel (e.g., complex litigation, IP disputes, M&A;)

A practical way to assess resourcing decisions is to evaluate work based on volume and risk or complexity.

High-volume, low-risk work should be pushed as close to the business as possible, supported by clear guidance and AI where appropriate. Examples include routine data subject access requests or standard marketing queries.

High-volume work with greater complexity can often be handled through a combination of AI and outsourcing, particularly for routine commercial agreements.

Lower-volume but higher-risk work should remain within the Legal team, with investment in internal capability and selective use of AI to augment expertise. This category typically includes strategic partnerships and complex negotiations.

The highest-risk, lowest-volume work remains the domain of external counsel, such as complex litigation, intellectual property disputes, or M&A support.

Resourcing decisions should be intentional and reviewed regularly as the business and its risk profile evolve.

## Part 6

# Legal Intake

**Once Legal is clear on what work belongs where, the next constraint is demand.**

Most Legal teams do not have a demand problem; they have a demand design problem.

Without a clear intake mechanism, work enters Legal through emails, messages, meetings, and informal escalations. This obscures prioritization, creates inequity in workload allocation, and makes it impossible to understand what Legal is actually spending time on.

**A Legal intake or "Legal front door" is not about bureaucracy. It is about intentional control.**

The specific tool matters far less than the design. A front door might be implemented through a ticketing system, a structured form, an intranet page, a CLM workflow, or a dedicated Legal intake tool. What matters is that all work enters through a single, visible channel.

When designed well, a Legal front door allocates work transparently, creates visibility into demand patterns, and surfaces repeat questions and low-value work. Over time, this insight allows Legal to reduce demand at the source by improving guidance, training, or self-service options.

Intake is the foundation for every other optimization lever. Without it, Legal is operating blind.

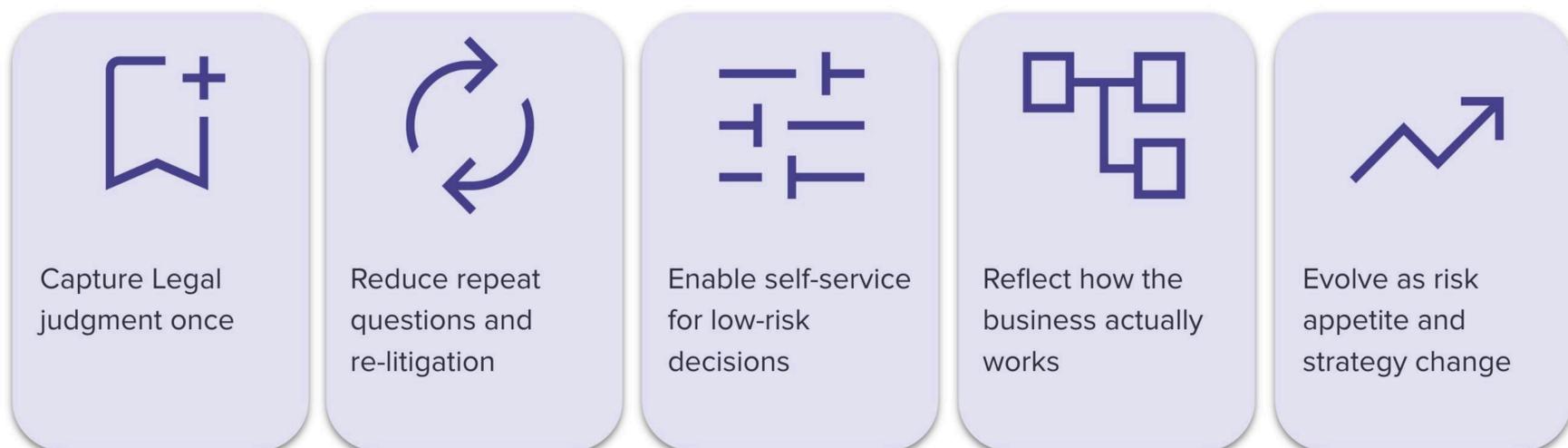
## Part 7

# Knowledge Management

**Knowledge management is where Legal judgment is either trapped or scaled.**

Most Legal teams have knowledge, but it lives in individuals, inboxes, and precedent folders. This forces Legal to answer the same questions repeatedly and re-litigate decisions that have already been made.

A well-designed knowledge hub should:



A scalable knowledge hub captures Legal judgment once and makes it reusable. It should reflect how the business actually operates, not how Legal wishes it did. The format can vary. It might be an internal wiki, a playbook library, embedded guidance inside workflows, or a self-service portal for the business.

The shift here is subtle but critical. Legal knowledge should not merely answer questions. It should guide decisions. When knowledge shows up at the point of action, the business gains autonomy while Legal retains control.

Over time, a well-designed knowledge hub evolves with the organization's risk appetite and strategy. It becomes a living system rather than a static repository.

## Part 8

# Contract Management

**Contracts are where most Legal teams feel the pressure of scale first.** Routine agreements can consume a disproportionate amount of Legal time, often without delivering proportional value.

Optimizing contract management requires pulling two foundational levers and two scaling levers.

### Foundational Levers

- Contract Simplification reduces unnecessary complexity and variation.
- Standards provide a shared baseline for acceptable risk and structure, reducing negotiation cycles and internal debate.

### Scaling Levers

- AI-assisted contract review allows Legal judgment to be applied consistently and quickly.
- AI-enabled contract management creates visibility across executed agreements and their risk profiles.

**Simplification** reduces unnecessary complexity and variation.

BEFORE

This Agreement constitutes the entire agreement between the parties concerning the subject matter hereof and supersedes all prior negotiations concerning the subject matter hereof. Any and all other written or oral agreements existing between the parties concerning the subject matter hereof are expressly cancelled.



AFTER

This Agreement constitutes the entire agreement between the parties and supersedes all prior negotiations or other agreements.



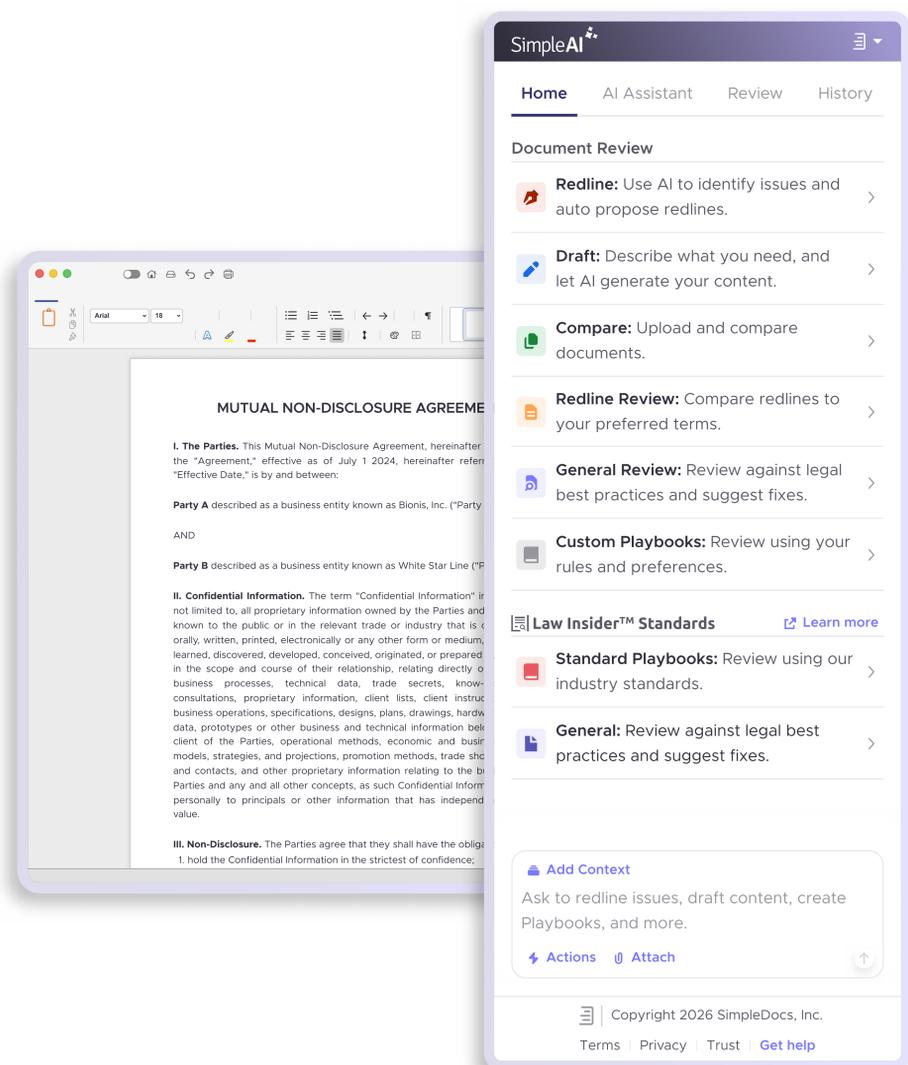
## Part 8 (cont.)

**Standards** provide a shared baseline for acceptable risk and structure, reducing negotiation cycles and internal debate.



The scaling levers build on this foundation. AI-assisted contract review allows Legal judgment to be applied consistently and quickly, while AI-enabled contract management creates visibility across executed agreements and their risk profiles.

The goal is not to automate judgment away, but to ensure that judgment is applied consistently, transparently, and at speed.



See SimpleDocs AI contract review in action

[Book a Demo](#)

## Part 9

# Data and Reporting

Data and reporting are often treated as an afterthought in Legal. When they exist, they tend to focus on volume rather than insight.

Effective data should help Legal:

- Understand where time and effort are actually spent
- Identify patterns in risk, delay, and escalation
- Test whether design decisions are working
- Make trade-offs visible to the business.

This is not about measuring everything that can be measured. It is about measuring what matters, based on Legal's objectives and the business context.

When used well, data becomes a steering mechanism for the Legal function rather than a retrospective reporting exercise.

# +1: Change Management

**Every Legal transformation fails or succeeds on change management.**

New systems do not stick because they are well designed. They stick because urgency is created, stakeholders are aligned, and new ways of working are reinforced over time.

Change fails when it is treated as a one-off initiative rather than an operating shift. For Legal, this pillar exists to protect the transition from advisor to enabler. [Kotter's 8-Step Model](#) provides a clear and directional framework for change management in enterprise environments.



## Part 11

# Bringing it together

Optimizing Legal in 2026 requires three connected shifts:

<b>Identity</b>	<b>From advisor to business enabler</b>
<b>Posture</b>	<b>From reactive support to intentional design</b>
<b>Execution</b>	<b>From isolated fixes to connected system</b>

The 5+1 Framework provides a practical way to structure that shift. It does not prescribe tools. It forces clarity, alignment, and deliberate design.

Designing Legal is not a one-time project. It is an ongoing discipline. The organizations that get this right will move faster, manage risk more effectively, and create leverage far beyond the size of their Legal teams.

## Conclusion

# Seeing this framework in practice

**Designing a Legal operating model on paper is only part of the work.** The real test is whether those design decisions can be embedded into day-to-day workflows without creating friction or losing control.

This is where tooling matters—not as a shortcut or a silver bullet, but as an enabler of intentional design. The right tools make it possible to translate Legal judgment into repeatable systems, apply it consistently at scale, and generate insight that allows Legal to continuously refine how it operates.

SimpleDocs supports Legal teams on this optimization journey through AI-native tools that map directly to the pillars in this framework. From structured intake and embedded guidance, to standards-driven contract review, AI-assisted negotiation, and visibility into risk and workload, the platform is designed to help Legal function as a business enabler rather than a bottleneck.

Curious to learn more?

See how SimpleDocs can support your Legal function.

[Book a Demo](#)