

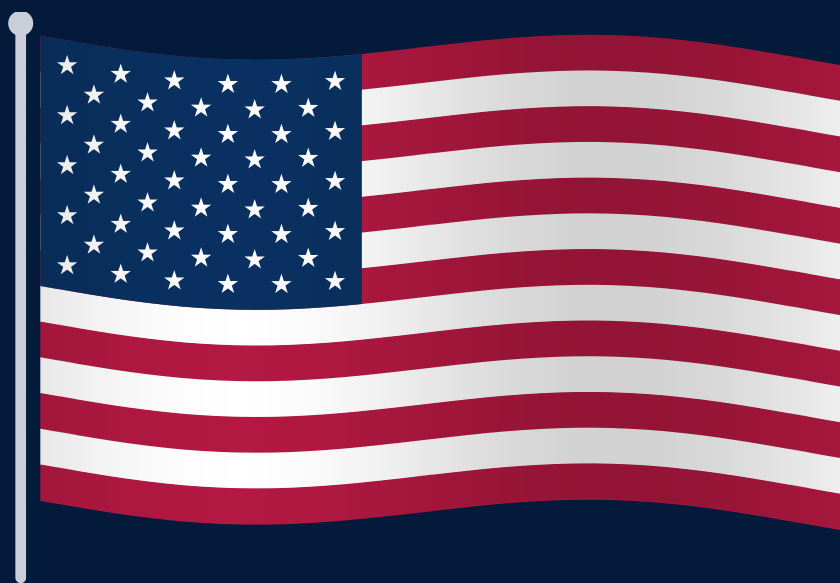


ALA BOSTON ★ AMERICA AT 250

The Boston Pulse Report

What Boston's legal administrators told us about the state of today's law firm, and what to do about it.

FROM STARS, STRIPES AND STRATEGY AND GUARDIANS OF THE FIRM
DEBBIE FOSTER, FOUNDER & CEO, AFFINITY CONSULTING GROUP



FROM DEBBIE

A note before you dig in

Thank you for your honesty on Sunday.

When we planned this session, I wanted to do something different from a traditional keynote. I wanted to hear what is happening inside your firms right now and put it next to what I see working with law firms across the country every week.

This report is the result. It is organized around six focus areas I believe firms need to prioritize in 2027. Each section includes what you told us, what I think it means, what I have seen work, and where to start. Your answers are the Boston reality check on everything I teach and speak about.

I promised you would see all of the data, so it is all here. Every poll result appears in the body of the report, and every typed answer appears in the appendix.

One idea runs through every page. Law firms rarely have an idea problem. They have an execution problem. You will leave this conference with plenty of good ideas. This report is designed to help you choose one and see it through.

At the end, you will find a memo you can complete and hand to your managing partner. Please use it.

Debbie

READ THIS FIRST

About this data

About 55 to 60 people were in the room on Sunday. Many were business partners, and I asked them to sit out any question they could not answer with confidence for a specific firm. The answers come primarily from the 30 to 35 legal administrators and firm leaders in the room, and this report speaks for them.

A few notes as you read:

- Each question received between 23 and 36 responses. Percentages reflect the people who answered that question.
- Some questions allowed more than one answer, so those totals exceed 100%. Each is noted.
- Typed answers appear as written, with spelling corrected. Anything that could identify a person has been removed.
- This is a snapshot of one room. It is a strong cross-section, and it is candid.

Where it helps, I compare Boston to the 66 firm leaders who answered similar questions at the ALA Annual Conference in April 2026.

Benchmarks are useful, but the most meaningful benchmark is your firm compared to itself a year from now. Use these numbers to start conversations inside your firm.

As I shared on Sunday, Claude, my AI collaborator, helped organize the data and assemble this report. The analysis and recommendations are mine.

THE HEADLINES

Boston at a glance

<div>7.7 out of 10</div> <div>How you believe clients would rate your firm</div>	<div>0%</div> <div>Firms that learn a client is unhappy by asking</div>
<div>2.5 out of 5</div> <div>How connected your systems are</div>	<div>7%</div> <div>Firms confident they know what data people put into AI tools</div>
<div>54%</div> <div>Named professional development and training as a top friction point</div>	<div>57%</div> <div>Firms where future leaders learn as they go</div>
<div>70%</div> <div>Say leadership avoids underperformance and holding standards</div>	<div>0%</div> <div>Firms where five partners would name the same top priority</div>
<div>52%</div> <div>Administrators whose role has grown in scope and influence</div>	<div>63%</div> <div>Named "rethink how work gets done" as their firm's biggest gap</div>

THE FRAMEWORK

The six focus areas

These six areas came from two sources: the data from *Keeping Up with the Joneses* at ALA Annual, and hundreds of conversations with firm leaders over the past year about where they are stuck. There could easily have been ten. These are the six I believe matter most heading into 2027.

- 1. **Rethink how work gets done.** AI is the trigger. The opportunity is redesigning the work itself.
- 2. **Win on client experience.** Clients judge how it felt to work with you.
- 3. **Own the pricing conversation.** Faster work makes the hour harder to defend.
- 4. **Find, trust and protect your data.** You cannot govern, connect, or protect data you cannot find.
- 5. **Build the bench.** Grow the people you have and start succession early.
- 6. **Decide faster.** Decision speed is the hidden constraint in most firms.

AI is not its own focus area. It runs through all six.

WARM - UP

How people at your firms are feeling

Describe how people are feeling at your firm right now, in one word. (33 responses, 38 words)



Challenged, Confused, Unsettled, Unengaged, Exhausted, Stagnant, AI overload, Uncertain, Uneasy, Tense, Nervous, Panic, Frustrated, Content: 1 each

Nearly half of the words were overwhelmed, stressed, or anxious. One was positive. The rest point to uncertainty about what comes next: tense, uneasy, nervous, unsettled, uncertain.

This question asked about the people at your firms. You are the ones leading people who feel this way, and that shapes everything else in this report. Change lands differently on people who are already overwhelmed. It has to be paced, explained, and supported.

The industry is in the middle of a real transformation, and there is no single right path through it. The right answer depends on your firm, your clients, your appetite for investment, and how seriously you

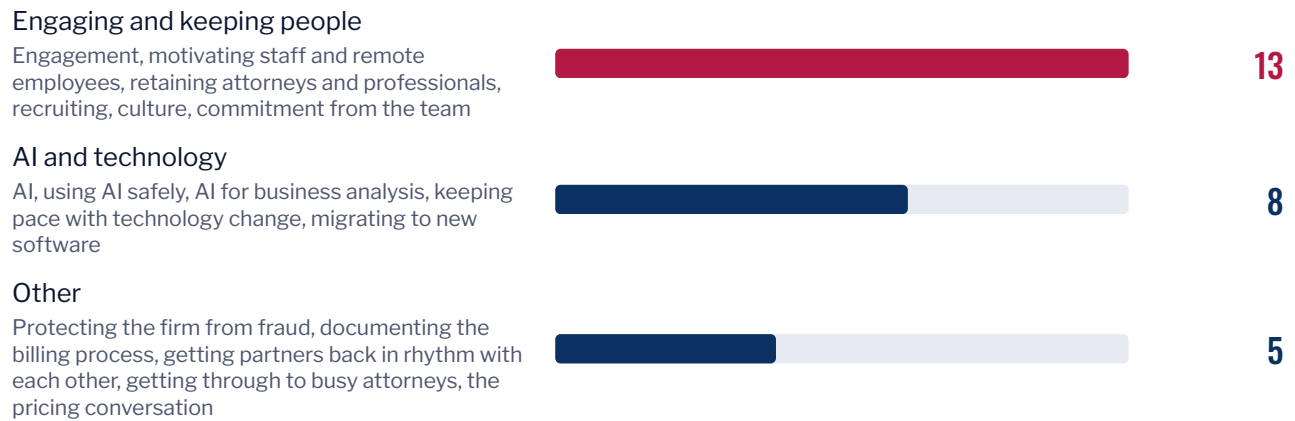
take training. What is consistent is this: people handle uncertainty better when their leaders are steady and clear.

Michael S. Cohen of Duane Morris made this point in his Monday session. The anxiety people carry does not get checked at the door, and leaders have to inspire calm. That means responding to problems with steadiness and making it clear that hard things are expected and manageable.

YOUR AGENDA

What you came to Boston to solve

What's the one challenge you most want help with before you leave this conference? (26 responses, collected for this report)



Half of you came to Boston for help with people. That theme appears in nearly every section that follows, and it shaped the Monday closing session.

Rethink how work gets done

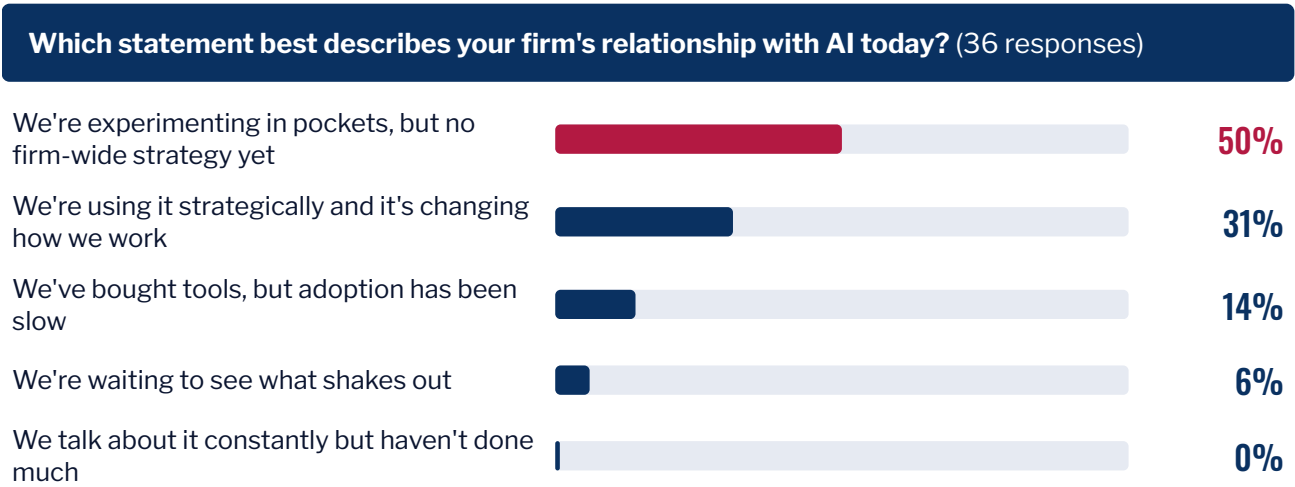
WHY THIS MATTERS IN 2027

AI is exposing problems that have existed in law firms for a long time. When a firm places a new tool on top of inconsistent workflows, it either accelerates the inconsistency or the tool fails to deliver. The technology is rarely the issue.

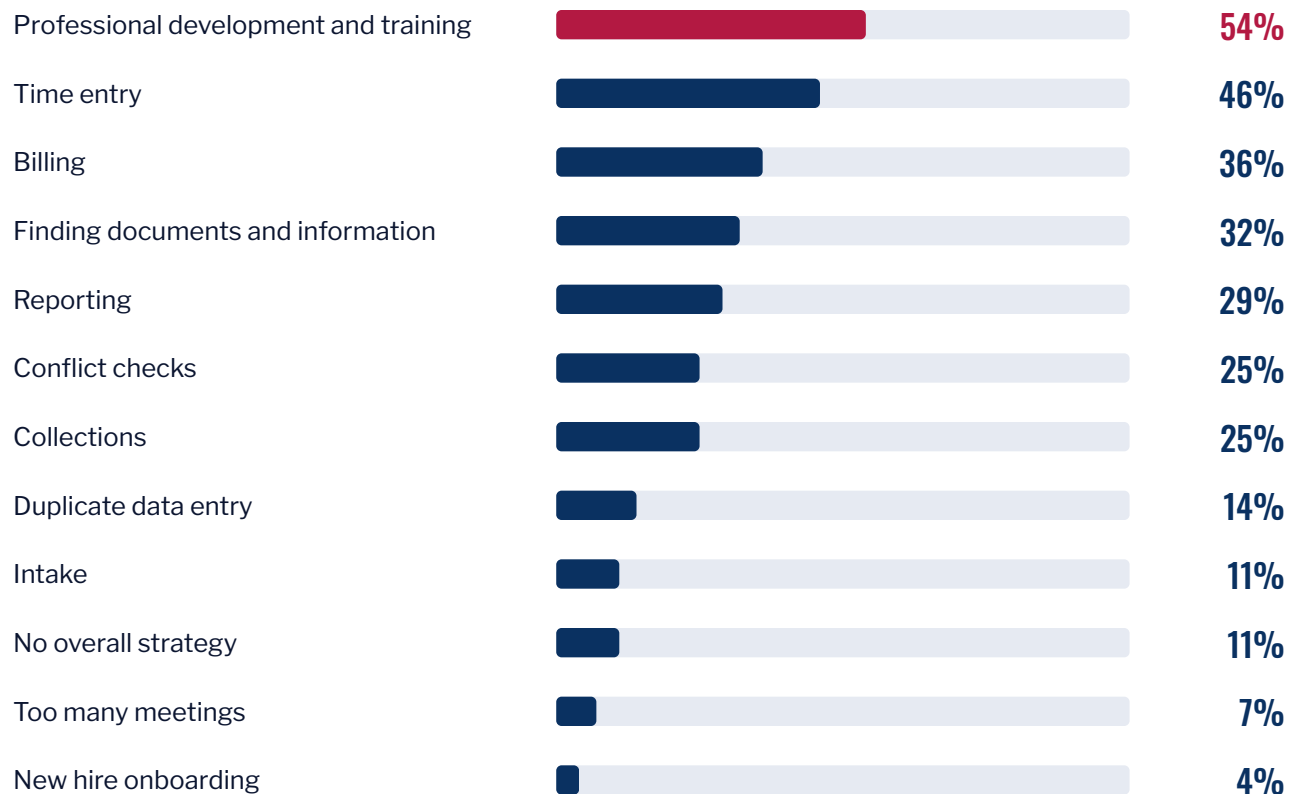
For decades, firms have allowed each lawyer to work in whatever way makes sense to them. Many firms operate on what I call the exception economy: the more powerful you are, the more you get to say, "I don't want to do it that way." I regularly work with practices where four lawyers in the same practice area use four different sets of templates. The paralegals supporting them have to remember each lawyer's preferences. New hires describe these firms as hard places to work, and they are right.

Rethinking how work gets done means deciding what should be consistent across the firm and what should remain individual. How a lawyer counsels a client is their art. The work around it, from intake to templates to billing, needs design.

WHAT YOU TOLD US



Where is the most process friction in your firm? (28 responses, top 3 selected)



WHAT IT MEANS

Boston is ahead of the national room on AI strategy: 31% here compared with 20% at ALA Annual. Half of the room is still experimenting in pockets. That is a normal stage, and it is also the point where firms either connect their experiments to a plan or let them drift.

The friction results are telling. Professional development and training ranked first, ahead of time entry and billing. I read that as a signal that firms are feeling the limits of how they train. An hour of tool training does not teach anyone to reimagine how they work with their paralegal, how they divide work between partners and associates, or how a matter should flow. People need help rethinking the work, and the tool comes second.

This applies to the business side of the firm as well. Many of you are already using AI for financial analysis that used to take weeks.

There is a useful parallel in practice management software. Clio's founder used to describe it as cloud-based practice management. Several years ago he dropped the word "cloud," because there was no longer a reason to say it. AI is following the same path, and faster. Before long, firms will no longer describe themselves as using AI. It will simply be how work gets done.

WHAT I'VE SEEN WORK

- ★ **Start with friction.** Choose the one process that costs your firm the most time or frustration and redesign it end to end. You do not need to map every process in the firm. You need to fix the few that matter most.
- ★ **Standardize what clients and colleagues should never have to think about.** Templates, intake, file structure, and bill formats are good places to start. One firm I worked with had dozens of bill formats and took nearly two weeks to get bills out each month. Standardization changed both numbers.
- ★ **Build believers, not just users.** Find the few people in your firm who believe there is a better way and are willing to invest time in it. Give them permission, resources, and a real problem to solve. Their results will persuade others faster than any mandate.
- ★ **Pilot small, then expand.** Choose one practice group, measure the results, and use them to make the case for the next group.
- ★ **Train inside the work.** Short, repeated sessions built around real matters outperform a single feature demo.
- ★ **Keep AI tool commitments short.** These tools are changing quickly. A one-year contract at a premium is often worth more than a three-year discount, because flexibility has value. Core systems like billing and accounting are the exception.
- ★ **Expect resistance rooted in imagination.** A lawyer once told me she could not imagine any way to label her file folders except with a typewriter. Some of your most experienced people will struggle to picture a different way of working. Your job is to help them see it and give them room to try.

FROM THE CONFERENCE

Ford Saeks brought practical AI to Monday's program, and his central point fits this focus area. The future belongs to the people with the best judgment, more than to the organizations with the best AI. AI creates capacity, he said, and humans create value, so keep a person in the loop on anything that matters.

He warned about an overconfidence trap. The first answer AI gives you is the fast answer, and it may not be the good one, so ask a second question and check what it tells you. To get better results, give AI context, clear expectations, and examples of your own work, and build training documents and standard procedures it can learn from. He also suggested asking AI to list the questions it needs answered before it starts, and to separate facts from assumptions in what it produces.

Two of his lines are worth borrowing. "Own the playbook, rent the technology": document how your AI workflows and agents work so you can move to another tool when the technology changes. And make AI a habit, not a hobby. His homework for the room was simple: take a photo of your conference notes, tell AI your role, and ask it for your top three priorities.

He also asked a question every firm should answer: who owns AI here? Someone needs to own the approved tools, the settings, the policy, and the training, because people will use other tools whether the firm approves them or not.

WHERE TO START

- 01 Choose one friction point and redesign it.** Select the process from the list above that costs your firm the most. Ask three people who live with it every day how they would fix it. Start there.
- 02 Replace one tool training with a "how we work" session.** Meet with one practice group to discuss how AI should change the handoffs between lawyer, paralegal, and assistant.
- 03 Identify your believers.** Name two or three people who are ready to experiment, give them a specific problem, and report their results to firm leadership in 90 days.

Win on client experience

WHY THIS MATTERS IN 2027

Clients are changing. Many lawyers have already received a document a client drafted with AI, along with a request to review it. Clients are also comparing their legal experience with every other service they use.

Law firms have a longstanding challenge here. Clients hire lawyers more often than they hire firms, so the client experience is defined by individual relationships and can vary widely from one practice group to the next. Most clients are not in a position to judge the quality of the legal work. They judge responsiveness, clarity, and whether the bill matched their expectations.

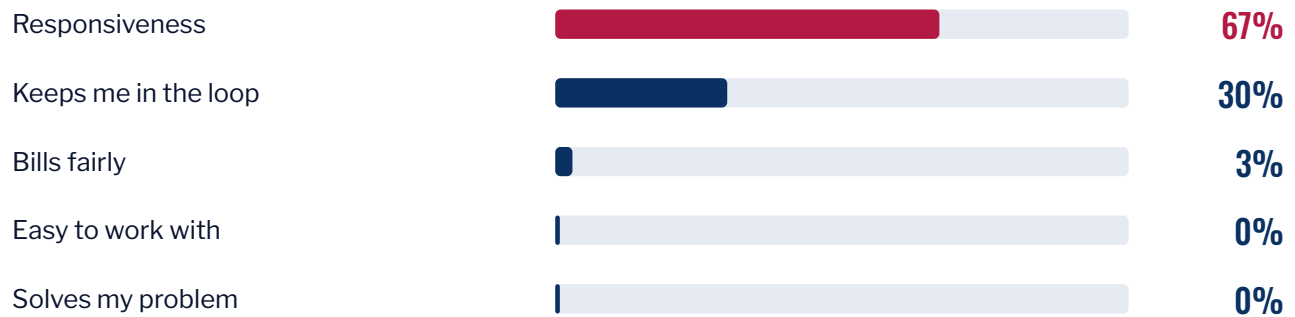
WHAT YOU TOLD US

If every client rated your firm, what would the firm-wide average be? Consider responsiveness, ease of working together, solving the problem, and billing fairly. (32 responses, scale of 1 to 10)

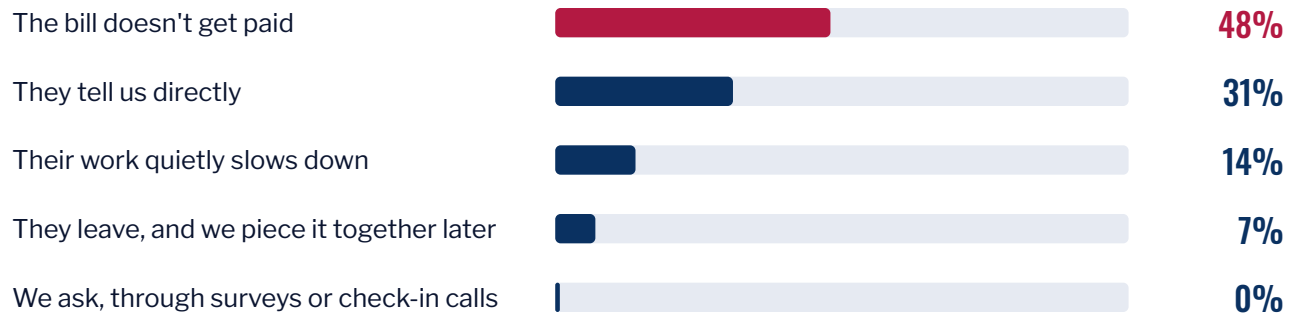
Boston's average: 7.7 out of 10



Which would your clients rate lowest? (30 responses)



How do you usually find out a client is unhappy? (29 responses)



WHAT IT MEANS

This is the most important finding in the report.

Boston believes its clients would give it a 7.7, and that may well be accurate. But no firm in the room learns that a client is unhappy by asking. Nearly half learn when the bill goes unpaid. And when we asked which of the six focus areas was each firm's biggest gap, client experience received no votes.

Firms are confident, they are not measuring, and the issue is not on anyone's list of priorities. That is the definition of a blind spot.

Responsiveness ranked as the clear weak point, which matches what I see. Keeping clients informed ranked second, and it deserves its own attention. How a firm keeps clients updated on their matters is a strategic decision. When it is left to each lawyer, the experience becomes inconsistent.

Ownership is part of the issue. In many firms, the lawyer owns the client relationship and the firm does not. Some firms still have lawyers who tell the billing team not to contact their clients about unpaid invoices. A growing number of firms are addressing this directly. I recently worked with a firm hiring its first director of client experience, and I expect we will see more of these roles.

WHAT I'VE SEEN WORK

- ★ **Define the experience at the firm level.** Decide how quickly every client should hear back, how often they should receive updates, and what a matter close-out looks like. Write it down and share it with everyone.
- ★ **Build a simple, proactive feedback program.** Firms that know where they stand with clients ask in more than one way:
 - **Midpoint check-ins** on longer matters, when problems are still easy to fix.
 - **A short survey at the close of every matter.** Three questions are enough: How did we do? Would you recommend us? What is one thing we could do better?
 - **Annual conversations with your most important clients,** led by someone other than the relationship lawyer, such as the managing partner, a client experience leader, or an outside interviewer. Clients speak more openly when the person asking is not the person they work with every day.

- ★ **Close the loop.** Share themes with your lawyers, act on one or two, and tell clients what changed because of their feedback. Asking and then doing nothing is worse than not asking.
- ★ **Make feedback part of the firm's record.** Capture what clients say in the client file or CRM, so the firm, as well as the lawyer, knows the health of each relationship.
- ★ **Make billing clear and predictable.** Surprises on a bill damage relationships faster than almost anything else. Budgets, regular updates on fees, and plain-language invoices all help.
- ★ **Close the chapter well.** One family law firm I know meets in person with every client when their matter concludes and gives them a small gift about starting over, with a choice of champagne or a non-alcoholic version. It costs very little, and clients remember it.
- ★ **Start the AI conversation with your clients.** Ask what they are doing with AI and what they expect from you. At a roundtable of general counsel I attended, every GC said they would welcome these conversations from their law firms. Firms are hesitant to start a conversation their clients are waiting for.

FROM THE CONFERENCE

On the panel, I shared what I hope a successful law firm looks like ten years from now. Clients will still hire lawyers. Repeatable, commodity work will look very different. And lawyers will lean into the value they bring as trusted advisors. Today, when I ask a room of lawyers how many love being a lawyer, 20 to 30% raise their hands. I would like that to be 75%, and I believe better client relationships are part of how we get there.

WHERE TO START

- 01 Call ten clients at the midpoint of a matter.** Ask two questions: How are we doing? What would make this easier for you?
- 02 Add a three-question survey to every matter close.** Review the answers quarterly with firm leadership.
- 03 Schedule conversations with your five most important clients this year,** led by someone other than the relationship lawyer.
- 04 Set a firm-wide response standard.** Agree on how quickly every client hears back from every lawyer, and measure it.
- 05 Decide how clients receive matter updates.** Choose a simple rhythm and format so the experience no longer depends on which lawyer a client works with.

Own the pricing conversation

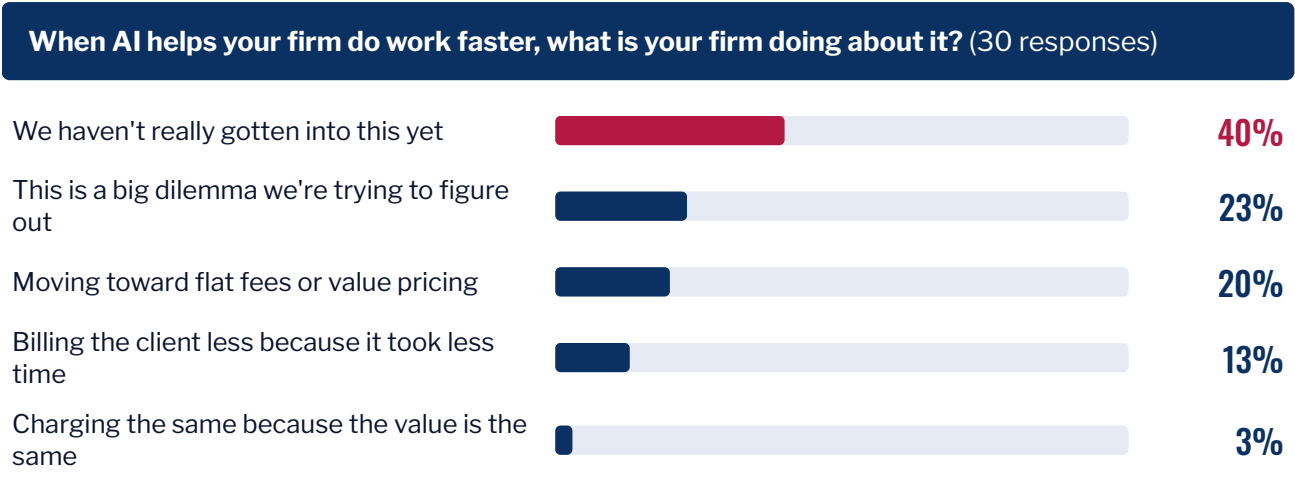
WHY THIS MATTERS IN 2027

In nearly every AI conversation I have with a firm, we arrive at pricing. The concern usually sounds like this: "This task takes five hours, and the client pays for five hours. If a tool lets me do it in one, why would I buy it?" There is a second layer to the worry. The firm also has to pay for the tool.

If the goal were to maximize hours, firms would trade their computers for typewriters. Clients will expect firms to use every tool available to do their work well and efficiently. The question is how firms capture the value of that efficiency.

Pricing is also the first in a chain of decisions. AI affects pricing. Pricing affects leverage. Leverage affects compensation. Compensation affects the business model. There is no longer such a thing as an isolated decision in a law firm.

WHAT YOU TOLD US



WHAT IT MEANS

63% of Boston firms have not engaged with this question or are still working through it, which closely mirrors the 73% at ALA Annual. The encouraging news is that 20% are already moving toward flat fees or value pricing.

Two other results stood out. Only one person said leadership is avoiding the conversation about the billable hour, and only one person selected pricing as their firm's biggest gap. With 40% saying they have not addressed it, I do not read this as a sign that firms have pricing under control. I read it as a sign that pricing is not yet on the leadership agenda.

The billable hour has lasted because it is easy to measure, and everyone measures it the same way. Value is harder to define. But every lawyer has had a 30-minute call that saved a client \$100,000. I do

not expect the billable hour to disappear. I do expect every firm to have work that should be priced on value, and identifying that work is part of leadership's job.

Value pricing is a shift of risk. Under hourly billing, when a matter estimated at ten hours takes fourteen, the client absorbs the difference unless the firm writes off time. Under a flat fee, the firm carries that risk, and it also keeps the reward for working efficiently.

WHAT I'VE SEEN WORK

- ★ **Run the math on one matter type.** Consider an estate plan billed at \$500 an hour for ten hours, or \$5,000. With automated templates, the same work takes three hours. Charge \$4,000 as a flat fee. The client pays less, and the firm earns far more per hour.
- ★ **Know where the money comes from.** An equity partner's income comes from three sources: being paid as a lawyer, being paid for exceeding expectations, and being paid as the owner of a profitable business. Understand profitability by practice group, by client, and by matter. You can allocate overhead reasonably without counting ceiling tiles.
- ★ **Don't cut your way to profit.** In my experience, three habits outperform cost-cutting in nearly every firm: bill for all the work, bill on time, and collect.
- ★ **Protect realization.** Small leaks add up. A 10% discount before the bill goes out, combined with 15% that is never collected, costs a firm roughly 23 cents of every dollar earned. Write-downs at lower rates compound the problem: two hours at \$500 equals four hours at \$250.
- ★ **Make billing a habit.** Two recurring calendar blocks remove most of the month-end friction: one to validate time on the last business day of the month, and one for prebill review early in the next month. Ask lawyers for the habit and let them choose how they meet it. The standard is firm-wide. The method can be personal.
- ★ **Take the emotion out of billing.** Lawyers are often reluctant to send a bill because they feel they owe the client something. Lawyers can be trusted advisors and run a business at the same time.
- ★ **Revisit rates when demand is high.** A firm leader recently told me her firm had more work than it could handle and that its rates were as high as the market would allow. When a firm turns work away, it has pricing room. Too much work and the challenge of implementing AI are two problems that can help solve each other.

FROM THE CONFERENCE

Michael Cohen shared on the panel that after 30 years of billing in six-minute increments, it is the part of the job most people like least. He expects flat fees to grow as AI changes how work gets done, and he hopes for a model that rewards people who do the work better.

WHERE TO START

- 01 Run one experiment.** Quote a flat fee for the next five matters of one repeatable type. Continue tracking time so you know your true cost to deliver.
- 02 Identify your predictable work.** Review billing data to find the matter types where you can estimate cost within a reasonable range. That is where value pricing begins.
- 03 Put two billing habits on the calendar.** Schedule time validation on the last business day of each month and prebill review early in the next.

Find, trust and protect your data

WHY THIS MATTERS IN 2027

Every firm wants to put AI to work on its own data. That only works when the data is complete, current, and well governed.

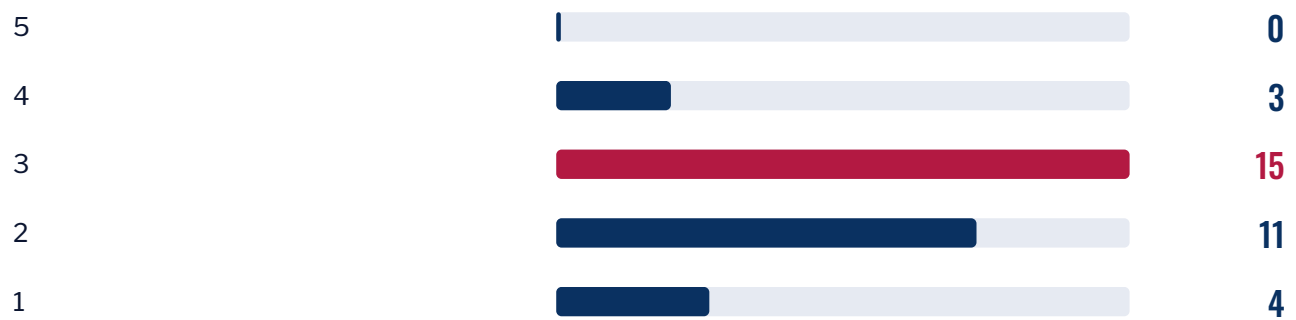
I recently saw a demonstration of a tool that summarizes everything happening on a matter. It was impressive. It was also September 28th, and lawyers at that firm were not required to enter time until the third of the following month. The summary would have missed nearly a month of activity. AI will answer confidently from whatever data it has, including data that is incomplete or data that should have been deleted years ago.

Even firms that have invested heavily in a document management system often have exceptions: "Everyone uses it except our litigators." Those exceptions are where governance breaks down. And retaining everything forever, back to decades-old files, creates as much risk as having no retention policy at all.

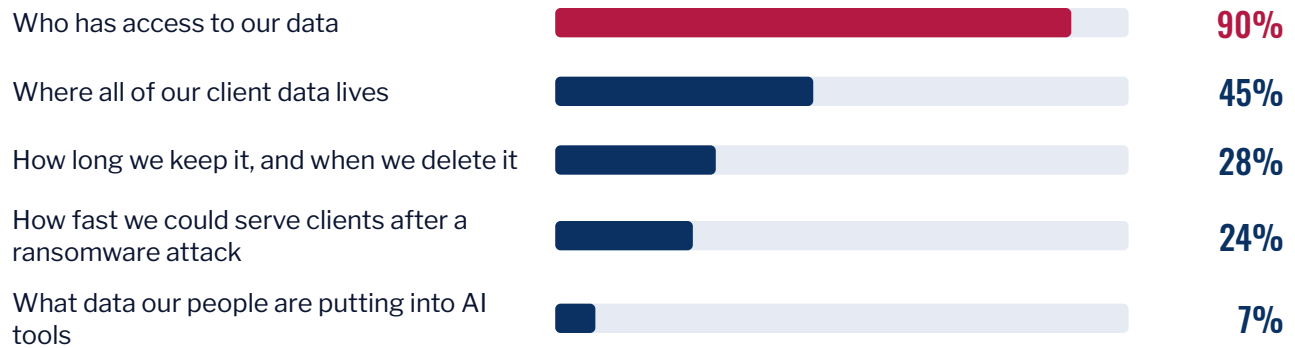
WHAT YOU TOLD US

How connected are your systems? 1 = we enter the same information over and over. 5 = we enter it once and it flows everywhere. (33 responses)

Boston's average: 2.5 out of 5



Which of these could your firm answer confidently today? (29 responses, all that apply)



WHAT IT MEANS

A score of 2.5 means significant manual work and duplicate entry. A simple change, like a client's new phone number, has to be updated in several places. Multiply that by tasks, deadlines, and calendar entries, and the cost becomes clear. I used to advise firms to stay out of the business of building bridges between systems. Today, reliable integration is one of the most important operational issues firms face.

90% of you are confident about who has access to your data. Fewer than half can say where all of your client data lives. Those two answers are difficult to reconcile. If a firm is not certain where all of its data is, it is hard to be certain about who can reach it.

The most striking number is 7%. Only two of 29 respondents could confidently say what data their people are putting into AI tools, even though 31% of Boston firms describe their AI use as strategic. A prospective client recently told me their firm had banned AI. A ban does not stop people from using it. It only makes that use invisible to the firm.

Behind most of these numbers is a habit problem. Nearly every firm has rules about where work belongs: documents go in the document management system, client emails get filed to the matter, notes and time get recorded promptly. Far fewer firms enforce those rules. When following them is optional, the firm's data becomes a reflection of each person's personal habits. Reporting suffers, succession gets harder, security gaps appear, and AI ends up answering from an incomplete picture.

A principle I teach applies here: make the right way the easy way. If the approved path takes more steps than the workaround, people will choose the workaround. Firms get consistent habits when the system is designed to make the standard the path of least resistance, and when leaders stop granting each person the latitude to decide how they will work.

Only 24% could say how quickly they would be serving clients again after a ransomware attack. In Dr. J. Michael Skiba's session, roughly half the room said their firm has an incident response plan. Put those numbers together and a pattern emerges: many firms have a document, but have not tested how the business keeps running during an incident.

WHAT I'VE SEEN WORK

- ★ **Make the right way the easy way.** Set the document management system as the default save location. Integrate it with email so filing a message to a matter takes one click. Build templates that start inside the matter. Then close the workarounds, such as personal drives, desktop folders, and personal file-sharing accounts.
- ★ **Write down the non-negotiables.** Keep the list short: client documents live in the document management system, client emails are filed to the matter, and time is entered daily. Lawyers keep full judgment over the legal work. Where the work is stored and how it is documented is a firm standard. The firm decides what has to happen and where the work lives. Individuals decide how they build the habit, the same approach that works for billing in Focus Area III.
- ★ **Measure adoption and follow through.** Track a few simple indicators, such as documents saved outside the system, unfiled client email, and time entry lag. Share them with leadership and address them with individuals, including partners.
- ★ **Leaders go first.** When partners follow the standard visibly, everyone else does too. When they are exempt, the standard becomes optional for everyone.
- ★ **Require a centralized, secure password manager.** Reused and shared passwords are one of the easiest ways into a firm. A firm-managed password manager lets people use strong, unique passwords without memorizing them, gives the firm control over shared accounts, and lets you revoke access immediately when someone leaves. Pair it with multi-factor authentication everywhere it is available. It is one more way to make the right way the easy way.
- ★ **Give data governance a business owner.** Governance is a leadership responsibility as much as a technical one. Someone needs to own where data lives, who can access it, and how long it is kept.
- ★ **Enforce one retention rule before writing ten.** Start with a single category, such as closed matters older than a defined period, and carry it through.
- ★ **Make approved AI tools easier to use than unapproved ones.** Ask people what they are using, without judgment. Then provide approved tools and a short policy people will read.
- ★ **Choose systems with integration in mind.** When evaluating new technology, ask how data will move between it and your existing systems before you ask about features.
- ★ **Test your incident response plan, including business continuity.** The plan should define who does what in the first hour and how the firm will continue serving clients while the incident is contained.

FROM THE CONFERENCE

Dr. J. Michael Skiba, known internationally as Dr. Fraud, delivered a message every administrator should hear: you are the people attackers target most. Partners may have protections in place, but administrators touch everything, from employee data and benefits to finances and vendor payments. You hold the keys to the kingdom, and criminals know it.

He explained that law firms are high-value targets because they hold money and sensitive information and because they communicate constantly with clients, banks, vendors, and other

firms. Every one of those exchanges creates an opening. He placed law firms well behind banking and insurance on prevention, largely because those industries are required to meet compliance standards.

His most memorable story came from a trip to Romania, where a guide warned his group about bears: "You don't have to outrun the bear. You just have to outrun your friends." Criminals he has interviewed have told him the same thing in their own words. When a target becomes harder, they move on to an easier one. A firm does not need perfect security. It needs to stop being the slowest runner.

He also described a law firm partner whose phone was taken over through a SIM swap. Within hours, a coordinated group was sending invoices to vendors, accessing email accounts, and reaching the partner's family. The firm had no response plan, so every step was reactive. His point was that the line between personal and business security has largely disappeared. AI has raised the stakes further, since free tools can now produce convincing deepfake video and clone a voice from a few seconds of audio.

His advice was practical. Have an incident response plan with clearly assigned roles. Include how the firm will keep serving clients while the incident is contained, which is the part firms most often overlook. Test the plan like a fire drill, and test it again as new people join. And return to the basics: when a request for money or information feels wrong, hang up and call the number you already have on record. People are the most common point of failure, and with modest training they become the strongest defense.

Ford Saeks reinforced two security habits in his session. Make sure people never reuse personal passwords at work, since a breach of a personal account often becomes a breach of the firm. And agree on a safe word, at work and at home, for any request to move money or change something like direct deposit, because a few seconds of someone's voice is enough to clone it.

On the panel, Michael added that in 32 years, every breach he has investigated came down to one person and one mistake, including at organizations with very expensive security systems. Training people remains the least expensive protection with the greatest return.

WHERE TO START

- 01 Answer the five questions above for your own firm, in writing.** Any question you cannot answer confidently becomes your data priority list.
- 02 Choose three non-negotiables and remove one workaround.** Announce the standards, make the compliant path easier, and close one alternative people use to avoid it.
- 03 Run one tabletop drill of your incident response plan this quarter.** Include how you would communicate with clients and keep work moving.

- 04 Adopt a "verify directly" rule.** Any request involving payments, wire instructions, or credentials gets confirmed by calling a number already on file.
- 05 Find out what is going into AI tools.** Ask without judgment, then provide approved tools and a one-page policy.
- 06 Require a firm-managed password manager and multi-factor authentication.** Set a deadline, make setup easy, and include partners.

Build the bench

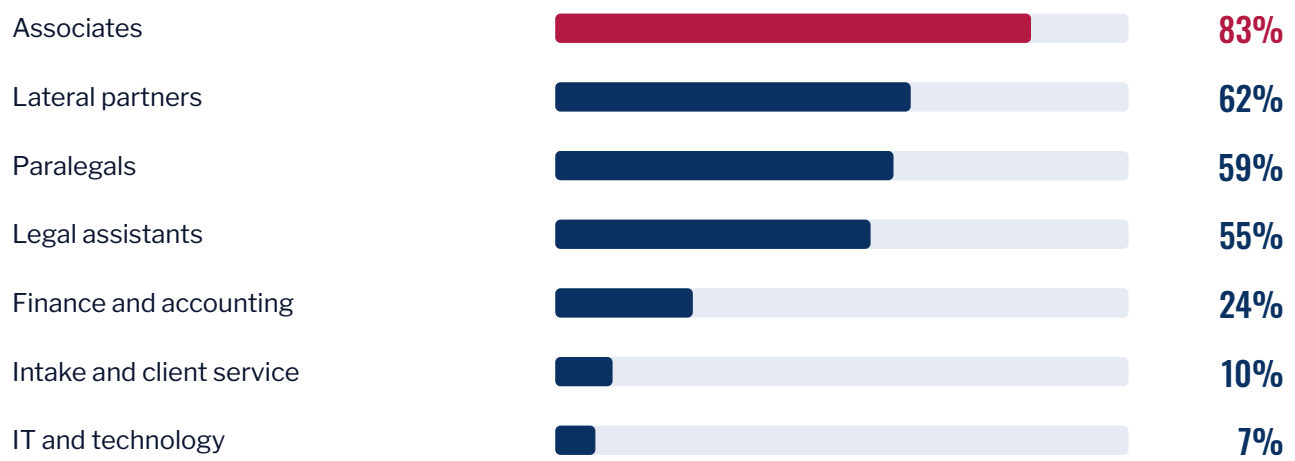
WHY THIS MATTERS IN 2027

Many of you hold the keys to the kingdom. If you were unable to work for a month, your firm would struggle. That is true for administrators, for key lawyers, and for long-tenured staff whose knowledge has never been written down.

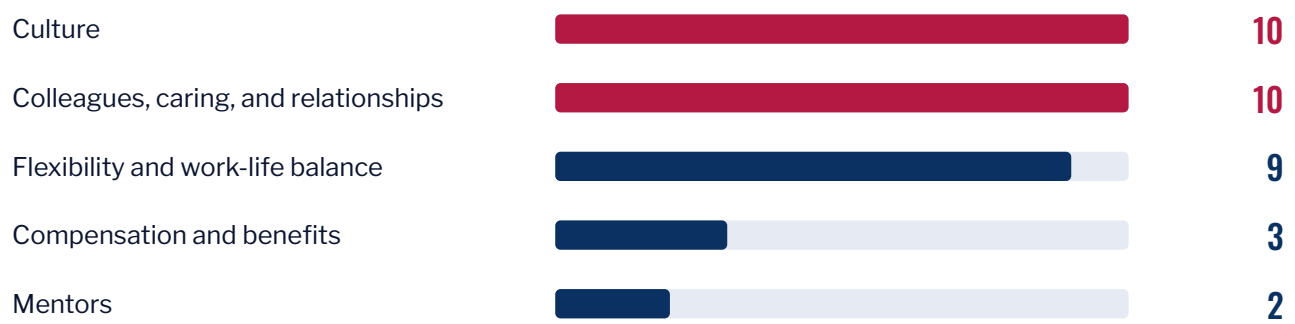
Building the bench means two things: developing the people you have, and planning for succession before someone resigns. It applies to every critical role, including yours. It also matters more than ever, because the roles themselves are changing. AI is reshaping the work of paralegals, legal assistants, and associates, and firms need to hire and develop for the jobs as they will be, not as they were.

WHAT YOU TOLD US

What are the three roles you struggle most to fill when hiring? (29 responses)

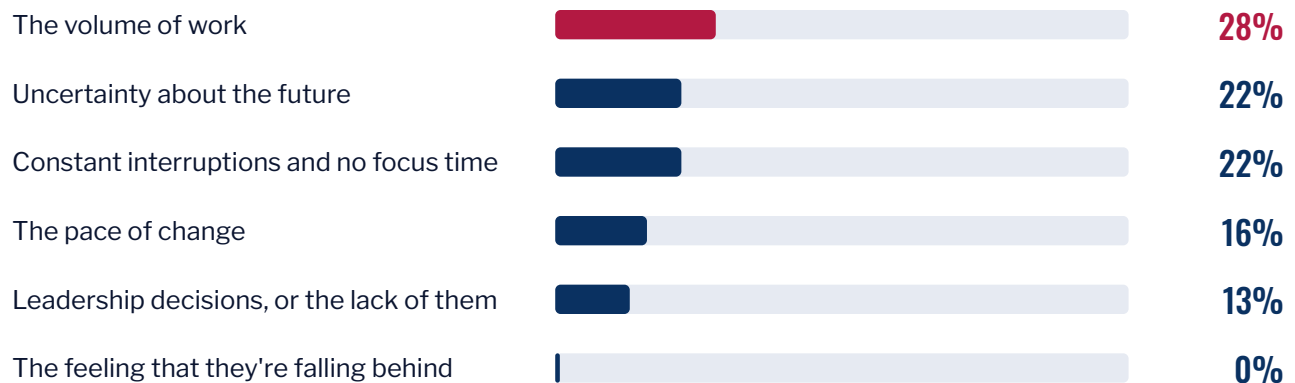


Why do your best people stay? (30 responses, typed answers grouped by theme)

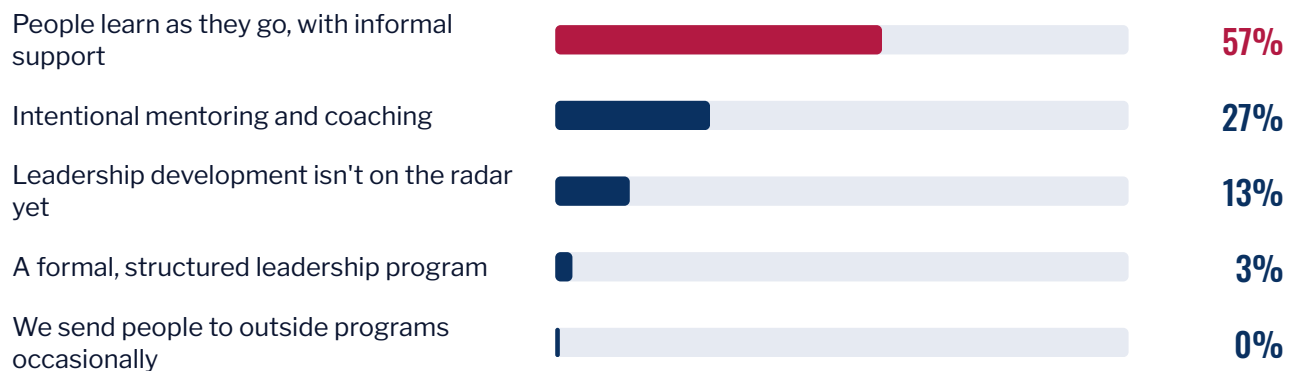


Many answers mentioned more than one reason. Every answer appears in the appendix.

What are your people most exhausted by right now? (32 responses)



How does your firm develop its next generation of leaders? (30 responses)



WHAT IT MEANS

The associate shortage is consistent in nearly every market I work in. Lateral partners ranking so high was more surprising, and it suggests firms are trying to buy growth they have not been able to build internally.

Compensation barely registered as a reason people stay. At ALA Annual, it ranked near the bottom at 5%. Fair pay is essential, and people will leave without it. Beyond that baseline, culture, colleagues, and flexibility are what keep your best people. There is also meaning in the work itself. Law firms protect people's assets, help them build businesses, and make sure their voices are heard. Connecting your people to that purpose matters.

Volume of work led the exhaustion list, as it did at ALA Annual. The question I would ask every firm is: busy doing what? Which tasks could be handled by AI with a person reviewing the output? What could be automated entirely? The tools many firms already pay for should be helping with exactly this problem.

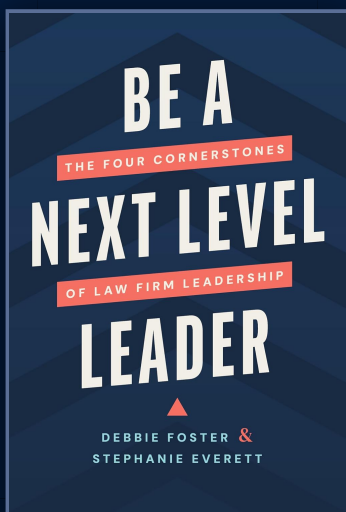
The leadership development results are the most concerning in this section. Only one firm in the room has a formal leadership program, and no one is sending people to outside programs. Too often, firms

promote strong performers into leadership roles and hope for the best. Pair that with professional development and training ranking as the top friction point in Focus Area I, and the gap is clear.

Rainmakers built the last successful era of law firms. Leaders will build the next one. Firms still need rainmakers. They also need people who can set direction, develop others, and make the firm work as a business.

WHAT I'VE SEEN WORK

- ★ **Capture what lives in people's heads.** For each critical role, document the mission-critical processes, where the related systems and data live, the key internal and external relationships, and the calendar of recurring obligations. Then name a backup for each and begin cross-training.
- ★ **Distinguish assigning from developing.** Assigning gets work done today. Developing builds capacity for tomorrow. Leaders who only assign end up doing more themselves over time.
- ★ **Match delegation to the person.** Some people need direction, some need coaching, some need support, and some need only the outcome and a deadline. Over-directing a capable person and under-supporting a new one are both common mistakes.
- ★ **Understand why the shift is hard.** Experienced leaders resist developing others for three reasons: speed, visibility, and identity. You can solve a problem in five minutes that takes someone else twenty. Your value is easy to see when you do the work and harder to see when others do. And for many people in law firms, expertise is identity. Efficiency in the moment creates inefficiency over time.
- ★ **Ask stay questions.** Ask your best people why they stay and what would make them leave. Compare their answers with what leadership assumes.
- ★ **Make development a line item.** If professional development has no budget, no owner, and no calendar, it will not happen.



FROM DEBBIE & STEPHANIE

Be a Next Level Leader

The Four Cornerstones of Law Firm Leadership

Stephanie Everett and I wrote this book for the people leading inside law firms, whatever their title. Leading in a law firm comes with political and cultural dynamics that make it different from leading in most other organizations, and many of the leaders in this room learned it on the job.

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SCAN TO ORDER

FROM THE CONFERENCE

Michael Cohen opened Monday with *We the People at Work: The Architecture of Law Firm Leadership*. His central message was that the leadership habits that matter most cost a firm nothing. He challenged leaders to humanize themselves and share interests with their people, to inspire calm when things go sideways, and to express gratitude. He also urged leaders to learn how each person prefers to receive recognition, since some people value public praise and others find it uncomfortable.

He shared a line from former 76ers coach Larry Brown that captures his approach: "I treat everyone fairly. That does not mean I treat everyone the same." That only works when leaders take the time to know their people. On the panel, Michael added that the cycle of advertising, hiring, training, and replacing costs far more than learning what motivates the people you already have.

Michael encouraged leaders to move from mentor to sponsor. Mentoring is talking with someone. Sponsorship is talking about them, and using the influence you have built for their success. He described listening as a superpower that most law firm leaders overestimate in themselves, and offered practical guidance: turn off notifications when someone comes to talk, resist forming your response while they are still speaking, and if you need to cut a conversation short, take responsibility for following up.

He also challenged the idea that an "open door policy" is enough. Leaders need to go to their people instead of waiting for people to come to them. And he reminded the room that leaders are rarely taught these skills. Firms promote people because they excelled at their previous role, then expect them to lead without preparation. Most leaders need to be taught.

On the panel, I made a related point. Firms often say they lack time to train their people, yet somehow find time to onboard a replacement after someone leaves. A leader with 13 people needs 13 different approaches, because people do not all need support in the same way.

WHERE TO START

- 01 Document who holds the keys.** For each critical role, including yours, name who could step in for a month. Start cross-training on the largest gap.
- 02 Ask your three best people why they stay.** Compare their answers with leadership's assumptions.
- 03 Schedule spontaneous check-ins.** Following Michael Cohen's advice, put brief, unannounced check-ins on your calendar to ask what is working, what is not, and to say thank you.
- 04 Act as a sponsor once this month.** Use your influence to create an opportunity for someone else.
- 05 Ask "busy doing what?"** Have one team track where its time goes for a week, then select one task to automate or reassign.

Decide faster

WHY THIS MATTERS IN 2027

This year we have watched firms take so long to choose between three options that one option disappeared and a new one emerged. Law firms do not need to move at the pace of the technology industry. But firms built on precedent, tradition, and consensus need to find ways to decide more quickly.

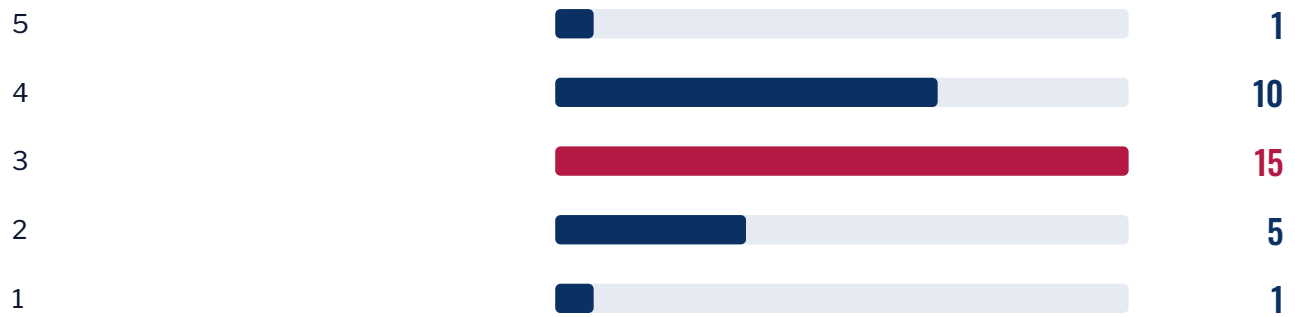
Good ideas often go to committees and stall there. A committee is usually a group of people who are interested in a topic. They are rarely experts in it, and rarely the people who make the final decision.

Indecision is a choice. When a firm does not decide, it has decided to keep things as they are.

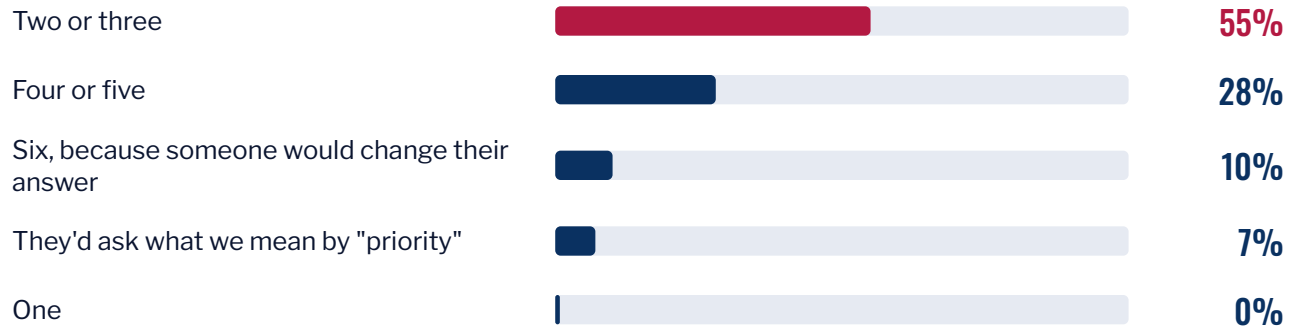
WHAT YOU TOLD US

How aligned are your partners on where the firm is going? 1 = "partners are supposed to be aligned?" 5 = completely aligned. (32 responses)

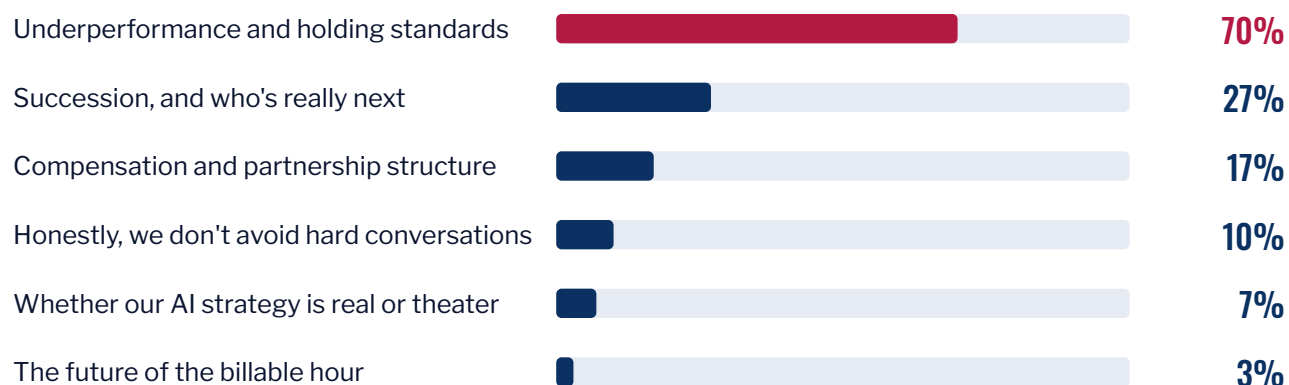
Boston's average: 3.2 out of 5



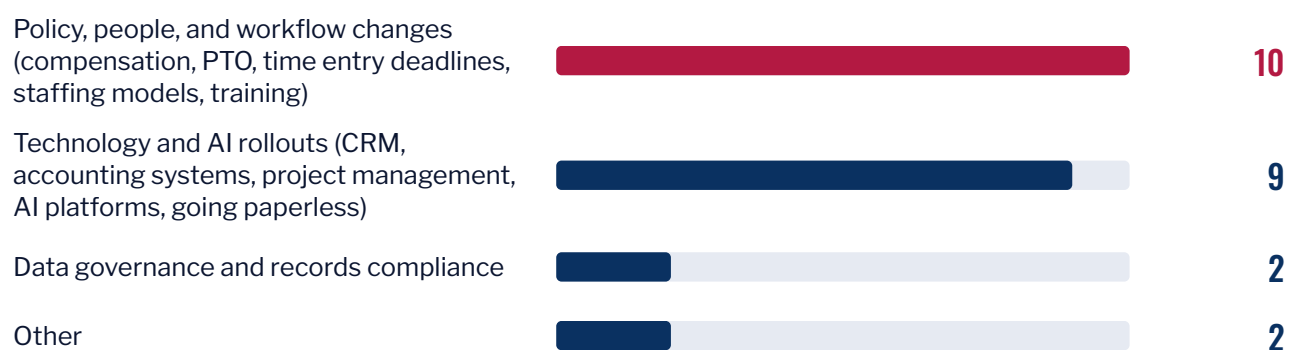
If you asked five of your partners for the firm's top priority, how many different answers would you get? (29 responses)



What conversation does your firm's leadership keep avoiding? (30 responses, all that apply)



Think of an initiative that didn't go as planned. What was it, and what got in the way? (23 responses, collected for this report after table discussions)



The reasons cited were consistent: partners declining to use the new system, no requirement to use it, a lack of leadership support, and resistance to change without a plan to manage it.

WHAT IT MEANS

A 3.2 sounds reasonable until you consider that it only takes one unaligned partner to stall a decision, and some partners carry significant influence.

No one in the room said five partners would name the same top priority. These are the owners of the business. A strategic priority describes what the firm is trying to accomplish over the next year. "Get the bills out faster" is an operational goal.

Underperformance and holding standards led by a wide margin, as it did at ALA Annual. I regularly sit in partner meetings that cost \$5,000 an hour where the discussion centers on the same people missing the same targets. Some conversations are avoided entirely. Others are repeated without anything changing. Both are versions of the same problem.

The failed initiatives connect directly to this. CRM is one of the most common failed implementations I see, and several of you named one. When a firm launches something, everyone agrees in the meeting,

and a few people quietly decline to use it, that is another avoided conversation. Holding standards includes partners using the systems the firm has paid for. Focus Area IV describes how to make those standards easier to follow and harder to ignore.

WHAT I'VE SEEN WORK

- ★ **Plan one year at a time.** Set a one-year plan with a three-year view of where you are headed. Break the year into quarterly priorities and check monthly for anything that has stalled. Nobody can reliably predict what a firm will need five years from now.
- ★ **Define decision rights.** List the few decisions that require an equity partner vote, such as admitting or removing a partner, buying a building, or taking on debt. Assign every other decision an owner, using a simple framework for who is responsible, accountable, consulted, and informed. Then enforce it.
- ★ **Pair responsibility with authority.** Firms often give administrators and leadership teams responsibility for outcomes without the authority to require anything. Law firms tend to have many rules and not many teeth.
- ★ **Run meetings that produce decisions.** Name the decision a meeting should produce. State how the decision will be made before the discussion begins. Close the loop on last meeting's commitments first. Capture who will do what, by when, before anyone leaves.
- ★ **Treat most performance problems as clarity problems.** When expectations are unclear, standards cannot be held. Be specific about what good looks like.
- ★ **Have the conversation with a structure.** Describe what you observed, explain its impact, and make a clear request. Avoiding a hard conversation can feel kind. It rarely is. Clarity is kindness.
- ★ **Plan for what people will lose.** Before launching any change, answer three questions: What exactly is changing? Why is it necessary, in specific terms? What will people have to let go of? Naming the loss helps people move through it.
- ★ **Decide in advance what happens when someone opts out.** Every initiative needs an answer before launch, and leadership needs to follow through.

FROM THE CONFERENCE

On the panel, I described an executive who joined a law firm from another industry and left after a year. He said he had never worked anywhere where there was not a single person he could direct. If leadership is going to change that, leaders need both the responsibility and the authority to say, "This is how we do it here," and make it stick.

The panel agreed that the greatest threat to the future of law firms is resistance to change, more than technology. The answer is rarely a dramatic overhaul. I call it relentless incrementalism: one meaningful change, then the next, like the tortoise who outlasted the hare.

Michael Cohen added an important dimension in his Monday session. If people cannot admit a mistake to their leader without fear of serious consequences, they will hide it. Holding standards

still matters, but innovation requires room to fail. Firms that want people to try new ways of working need leaders who respond to setbacks with steadiness.

WHERE TO START

- 01 Ask the five-partner question.** At your next partner meeting, have each partner write down the firm's single top priority for the next twelve months, then read them aloud.
- 02 Draft your decision rights.** List the decisions that require a partner vote and assign owners to everything else.
- 03 Decide the opt-out rule before your next launch.** Agree on what happens if someone does not adopt the change, then follow through.
- 04 Rescue or retire one committee.** Give it a decision maker and a deadline, or close it.

WHAT IS WORKING

Boston's best ideas

What does your firm do well that other firms should steal? (22 responses, collected for this report)

After four focus areas centered on gaps, it was important to hear what is working.



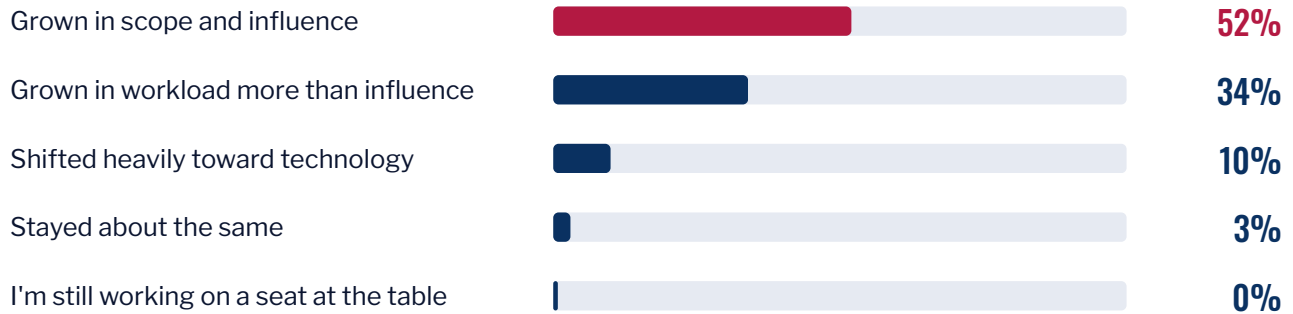
Two answers deserve attention. One firm simply wrote "no committees," which may be the most efficient summary of Focus Area VI. Another reported a 1:12 legal assistant to attorney ratio, supported by tools and teamwork. That is well beyond what most firms achieve and is worth learning from.

Small gestures matter more than firms expect. I once worked with a firm that replaced real cream with powdered creamer to save money. Before our strategy session, I asked the managing partner to bring back the real cream. It was a minor expense, and it meant a great deal to their people.

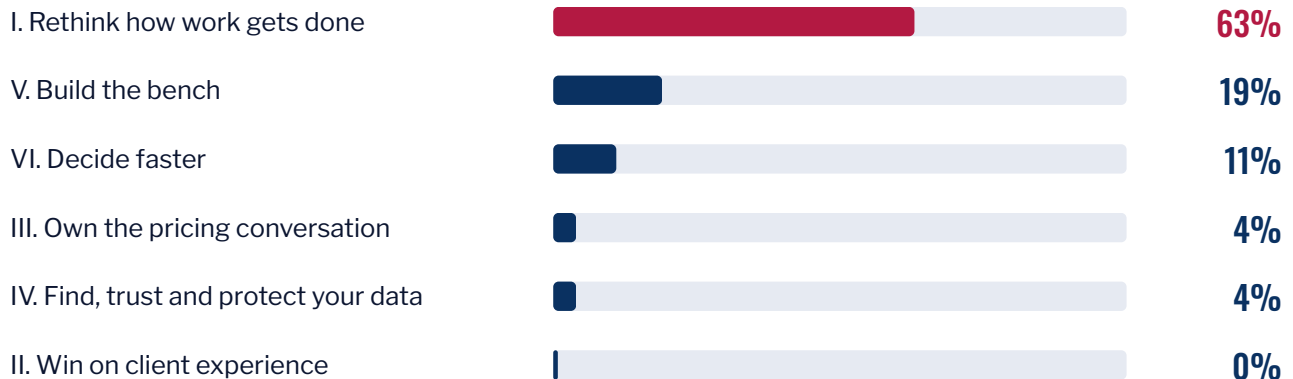
Your role and your firm's biggest gap

The session description promised a conversation about the future of your role, whatever your title.

Over the past three years, your role has: (29 responses)



Of the six focus areas, which is your firm's biggest gap? (27 responses)



WHAT IT MEANS

Half of Boston's administrators say their role has grown in scope and influence, and no one is still fighting for a seat at the table. That is a meaningful shift for this profession. A third say their workload has grown faster than their influence, and that imbalance deserves a direct conversation with firm leadership.

Rethinking how work gets done was the clear choice for biggest gap. That makes sense. Changing how a firm works requires many people to change, and no administrator can do it alone.

There is a tension worth naming. You identified the work itself as your biggest gap, but when asked what you came to Boston for help with, half of you said people. These answers are connected. Redesigning the work requires training, leadership, and standards to make the change last.

And notice the last row again. Client experience received no votes. See Focus Area II.

WHAT I'VE SEEN WORK

- ★ **Clarify complementary expertise.** Lawyers should do what only lawyers can do. Business leaders should own what they are uniquely qualified to lead. When those roles are clearly defined, both groups are more effective, and role clarity itself becomes a form of risk management.
- ★ **Be a thermostat, not a thermometer.** A thermometer reports the temperature of the room. A thermostat sets it. Administrators who set the tone for how the firm responds to change have far more influence than those who report on it.
- ★ **Protect priorities with a strategic "no."** When a new urgent request arrives, acknowledge it, name what it would displace, and let the requester choose. Most people reprioritize once they see the tradeoff.
- ★ **Recruit sponsors at the leadership table.** Change needs someone to build it and leaders who support it publicly. Identify the partners who will back your initiatives out loud.

FROM THE CONFERENCE

The panel spent considerable time on your role. One audience member observed that lawyers are often called revenue generators, while the people who run the firm are revenue enablers. Another noted that the ownership model in most states prevents business professionals from holding equity, even when they act as owners every day.

Michael Cohen said the most important attribute in any role is the willingness to advocate for yourself and your ideas, and to return to them when the first answer is no. He added that as technology levels the playing field, humanity becomes the differentiator. Being accessible, someone people can approach without fear of judgment, can be an administrator's greatest strength. Michael Skiba noted that your knowledge of how the firm operates will become even more valuable, because effective strategy depends on understanding the process.

Dr. Skiba's Monday session added a sobering counterpart. The same breadth of access that makes administrators essential also makes them the most targeted people in the firm. You are the firm's biggest dependency and its most likely point of attack, which is one more reason succession planning and security training belong on your own agenda.

I shared a pattern I see often. A firm leader raises an idea for years. Then a consultant arrives, says the same thing, and the partners decide to act. The hierarchy of a law firm can make it difficult for the person who has earned a seat at the table to be heard. That is not a reason to stop raising the idea.

[Add the core idea from Monday's closing session, Guardians of the Firm.]

Putting it together

Each focus area tells part of the story. Together, they reveal a larger pattern.

- 01 • You are not alone.** On nearly every question, the most common answer was some version of "we're working on it." If you arrived in Boston feeling behind, most of the room felt the same way.
- 02 • It is all connected.** Professional development ranked as the top friction point, and most firms develop leaders informally. Volume of work is exhausting people, and AI should be helping with exactly that. Leadership avoids underperformance conversations, and new systems fail when people quietly opt out. Progress on one area depends on progress in the others.
- 03 • Find your blind spot.** For Boston, it is client experience. Firms rate themselves highly, do not ask clients directly, and do not consider it a gap. Every firm has at least one area like this.
- 04 • Every challenge is a leadership challenge.** AI, talent, data, pricing, and change all depend on someone deciding what matters and helping people get there. That person can be you, whatever your title.
- 05 • Choose one thing, then the next.** Firms change through relentless incrementalism. Choose one "Where to start" action from this report, assign it a date and an owner, and tell someone you are doing it.

YOUR NEXT 90 DAYS

STEP	YOUR ANSWER
The focus area that matters most for my firm right now	
The one action I will take from that section	
Who needs to be involved	
The date it will be done	
How I will know it worked	

About the speakers

Debbie Foster is the CEO of Affinity Consulting Group, where she helps law firm leaders navigate growth, organizational complexity, and strategic change. With more than 30 years of experience advising thousands of law firms, she specializes in leadership development, strategic planning, governance, operational improvement, and technology optimization, with a strong focus on aligning people, processes, and strategy. Under Debbie's leadership, Affinity has grown into a fully remote organization spanning 24 states and operating two brands: Affinity Consulting for mid-market and enterprise firms, and Lawyerist for solo and small practices. A Fellow in the College of Law Practice Management, she has held leadership positions with the ABA Law Practice Division, ILTA, and ALA, and has twice chaired ABA TECHSHOW. She is the co-author of *Be a Next Level Leader*. Outside of work, Debbie enjoys cruising, reading, and spending time with her family. Her favorite title is "Lolli" to her three grandsons, Koa, Kaiden, and Keegan.

Michael S. Cohen is a partner in the Employment, Labor, Benefits and Immigration Practice Group at Duane Morris, where he focuses on employment law training, counseling, investigations, and compliance matters for employers nationwide. He conducts more than 200 trainings each year on topics including harassment prevention, diversity and inclusion, workplace leadership, mental health, and employment law compliance, and he hosts the *Like a Boss* podcast. He has been recognized nationally by outlets including The New York Times, Forbes, and The Associated Press, and serves on the boards of GenHERation and Serve, Inc. Inspired by his mother's landmark Supreme Court maternity leave case, *Cohen v. School Board of Chesterfield County, Virginia*, Michael is passionate about education, leadership, and advocacy.

Dr. J. Michael Skiba, known as "Dr. Fraud®," is an internationally recognized expert in financial and cybercrime with more than 30 years of experience in fraud prevention and investigations across 101 countries. As cofounder and President of the International Fraud Training Group, he advises governments, corporations, and global organizations, including the United Nations, on financial crime, cybercrime, and tactical intelligence. He is a professor and Department Chair at Colorado State University Global, a staff instructor for INTERPOL, the FBI, and the ATF, and the author of hundreds of articles, books, and fraud studies. He has delivered more than 400 presentations worldwide.

Ford Saeks is a Business Growth Accelerator with more than 20 years of experience helping companies, from startups to Fortune 500 organizations, generate over \$1 billion in sales worldwide. As President and CEO of Prime Concepts Group, he specializes in business growth, customer acquisition, branding, and innovation. He has founded multiple companies, authored five books, and holds three U.S. patents. His keynotes cover business growth, AI and emerging technologies, sales transformation, marketing strategy, and high performance.

Jon Petz, the conference emcee and panel moderator, is the world's only Amazement Artist™. A former sales executive and professional magician, he helps audiences create "Moments of Amazement" in their culture, sales, service, and relationships through storytelling, engagement, and entertainment.

Memo to your managing partner

Use this as written or adapt it. Complete the brackets and share it this week.

TO: [Managing Partner / Executive Committee]

FROM: [Your name]

DATE: [Date]

RE: What I learned at ALA Boston

At the ALA Boston conference, I participated in a live session where legal administrators from firms across the region answered anonymous questions about AI, clients, pricing, data, talent, and leadership. The full report is attached. Several findings are relevant to our firm.

Where peer firms see their biggest gap. 63% said rethinking how work gets done, and 19% said building the bench. For our firm, I would identify [our biggest gap], because [one sentence].

How aligned partners are. The room rated partner alignment 3.2 out of 5, and no one said five of their partners would name the same top priority. I would rate us a [#], and I believe five of our partners would give [#] different answers.

A blind spot worth checking. Firms estimated their clients would rate them 7.7 out of 10, but none of them learn about client concerns by asking. Nearly half find out when a bill goes unpaid. I would like us to [one idea, such as calling ten clients at the midpoint of a matter].

Additional findings:

- ★ Only 7% could confidently say what data their people are putting into AI tools.
- ★ Systems scored 2.5 out of 5 on how well they connect.
- ★ 70% said leadership avoids conversations about underperformance and holding standards.
- ★ 57% said future leaders learn as they go, without formal development.

What I would like to discuss: [The change you would like to make and what you need to make it happen.]

Could we take 30 minutes at our next [leadership meeting / partner meeting] to review it?

[Your name]

Appendix: every answer you shared

Every typed answer appears below as written, with spelling corrected. Answers submitted more than once show a count. The one-word feelings answers appear in full in "How people at your firms are feeling."

WHAT'S THE ONE CHALLENGE YOU MOST WANT HELP WITH BEFORE YOU LEAVE THIS CONFERENCE? (26)

- AI (2)
- AI engagement
- AI for business analysis
- Attorney retention (2)
- Commitment from team
- Culture
- Documenting the billing process at our firm to get ready for a new billing manager
- Employee engagement
- Engagement (2)
- Getting through to busy attorneys
- How to bring partners back into rhythm with each other for the future
- How to migrate to a new software efficiently
- Integrating people and retaining good employees
- Keeping up with the pace of tech change
- Motivating remote employees to be more engaged and invested
- Motivating staff
- Pricing conversation
- Protect the firm from fraud
- Recruiting
- Retention of professionals
- Safely using AI
- Staff engagement and respect
- Technology improvements

WHY DO YOUR BEST PEOPLE STAY? (30 PEOPLE, 33 ANSWERS)

- Care, compassion, and flexibility
- Comfort level and compensation
- Connection and collaboration
- Culture (2)
- Culture and kindness, flexibility
- Culture and people
- Culture and treating everyone fairly
- Culture, compassion, and flexibility
- Fantastic benefits package
- Fear of change
- Feel appreciated and like they are contributing
- Firm culture and flexibility
- Firm lunches
- Flexibility
- Lifestyle flexibility
- Loyalty
- Mentorship
- Money and culture
- Opportunity
- People care about each other
- Relationships with colleagues
- Supportive culture
- The collaborative and collegial atmosphere and the work/life balance afforded to our team
- The culture and environment we've built at the firm
- The least engaged people stay. Job role satisfaction.
- They care
- They have great mentors

- They like their colleagues and work environment
- They love their work. They continue to learn and be challenged.
- They see that they can make an impact
- Work/life flexibility (2)

WHAT DOES YOUR FIRM DO WELL THAT OTHER FIRMS SHOULD STEAL? (22)

- Annual reviews and raises
- Bet-the-farm litigation
- Client satisfaction
- Culture (3)
- Culture and kindness!
- Culture/caring for employees
- Culture, compassion, and flexibility
- Cybersecurity
- Depth of experience
- Employee recognition
- Employee recognition and food
- Fantastic onboarding process
- Keeping in touch with the client
- Marketing outreach/videos
- No committees
- Super-low legal assistant to attorney ratio, 1:12, successfully leveraging tools and teamwork to support
- Transparency within the partnership
- Treat everyone with dignity and respect all of the time
- We put on seminars for our clients featuring some of our attorneys and our best experts
- Work-life balance

THINK OF AN INITIATIVE THAT DIDN'T GO AS PLANNED. WHAT WAS IT, AND WHAT GOT IN THE WAY? (23)

- Accounting system replacement
- AI adoption for business purposes
- Changing the billable hour year to align with fiscal year
- Customer relations
- Data governance policy updates
- Formal engagement program
- Getting people excited about AI
- Handbook edits regarding PTO
- Initiatives with accounting strategies
- Legal assistants billing time for specific tasks
- Moving up the end-of-month time entry deadline
- New AI platform rollout
- New compensation structure
- New CRM
- Only pooled support for associates
- Paperless. Some partners refuse to read documents on the computer screen. Have to print everything.
- Practice group management strategy
- Pushing to get an HR person
- Records policy compliance
- Roll out of a project management system. Didn't force people to use it.
- Software implementation. Resistance to change and failure to plan for a successful implementation.
- Training. Lack of support from leadership made it impossible.
- Trustee software implementation that many partners refuse to use