

You Can’t Automate Trust: Why Legal Ops Success Depends on People, Not Platforms

Law Department Management



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Cheat Sheet:

- Operational breakdowns that look like technology problems are usually alignment problems. A new platform can’t fix a process nobody agrees on or understands.
- Trust gets built through ordinary daily interaction, not onetime events. Treat it as essential infrastructure, not a nice-to-have.
- External partners do better work when they’re treated as an extension of the internal team, with real visibility into priorities and budgets, rather than managed like outside vendors.
- AI and leaner teams are shrinking the informal time that used to build relationships on its own. Alignment now has to fostered on purpose.

In recent years, legal departments and compliance functions have focused on technology when considering how to improve their day-to-day operations and service to their internal clients. Workflow tools, matter management systems, reporting dashboards, automated intake processes, and, increasingly, AI-enabled platforms have all promised greater efficiency, consistency, and control. Yet, despite these investments, many organizations continue to encounter the same operational challenges: inconsistent decision-making, fragmented reporting, duplicated effort, and limited visibility across teams. The instinctive response today is to say AI can fix it. In reality, the problem isn’t the technology.

We come to this topic from opposite sides of the table — in-house and outside partner — and from a relationship that has been both a professional partnership and a genuine friendship. What follows draws as much on that shared experience as on either of our individual roles.

The most persistent operational failures occur because people, processes, and technology are not aligned around a shared why — not just the big-picture mission, but the reason behind each individual step, communicated all the way down to the person actually doing the work. Technology can accelerate a process, but it cannot fix one that's poorly understood, inconsistently executed, or disconnected from the people responsible for delivering outcomes. We rarely spend enough time on the why before we hand someone the how.

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That alignment comes from something unglamorous: the daily habit of treating the person on the other end of your email as a person, asking clarifying questions instead of assuming, and holding a shared sense of why the work matters across the team. Another word for that is trust. Most of us know instinctively that trust can't be automated. It has to be built. And, as this piece gets into, it increasingly has to be built on purpose, because the moments that used to establish it on their own are disappearing.

The technology/alignment trap

When organizations encounter operational friction, technology often appears to be the most tangible solution. New platforms promise visibility; dashboards promise transparency and accountability; automation promises efficiency; and AI promises scale. Yet, they don't always work once plugged into the actual process. What these solutions cannot provide is stakeholder alignment.

One of us was tasked with rolling out a dashboard to track a newly defined field for leadership. The dashboard met the requirements. Unfortunately, adoption of the process to populate the field flopped. The purpose of the dashboard was communicated; the purpose of the new field it was tracking was almost an afterthought. A platform may capture data flawlessly, but if legal, compliance, procurement and business stakeholders are working from different assumptions about goals, ownership or decision-making authority, it becomes a more sophisticated way of documenting confusion.

We've each felt what happens without that alignment. On one cross-department project, a plan was created, and one team kept assigning tasks to another team without their knowledge. The assigned team did not agree to the assignments and, in some cases, did not know how to complete them. What was missing wasn't the tool. It was the conversation that should have happened before anyone touched it.

A practical framework for operational alignment

Now more than ever, teams are looking for technology that will solve a problem. There's no arguing that new technology can bring improvements, but it's not the first step.

Clarify the process. Map how work moves through the organization — the decision points, the handoffs, where things get stuck — not the aesthetically pleasing, condensed version in the pitch

PowerPoint, but a representation of what actually happens. Bonus points if it’s created by the people who are doing the work. Nobody needs a perfect map, but they do need everyone working from the same one.

Align the people. Stakeholders need to understand their own responsibilities but also where their work touches everyone else’s. This gets hardest at the seams: legal, compliance, HR, procurement, finance and the business all run on different priorities and different clocks. Regular cross-functional time is what actually builds the trust to get through complicated matters together. No one wants another meeting, but there should be a way to allow people to connect and align.

Then enable with technology. Only once the process is understood and the people are aligned should the tool become the focus. Technology needs to reinforce how a team has already agreed to work. It shouldn’t be asked to define that on its own.

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The invisible work that makes legal operations programs successful

Legal operations teams are a hub that touches more stakeholders and business units than almost any other group in the organization — not to mention external partnerships including outside counsel, technology partners, and other legal providers. What is critical for a legal operations function to run effectively is mostly invisible: the operational relationships underneath it.

Every investigation, compliance review, or dispute of any size needs multiple stakeholders moving in coordination. Information must flow, and decisions have to be clear. People have to know what they own. When those relationships are strong, people talk, ask questions, and resolve roadblocks as soon as they're identified. When they're weak, obstacles proliferate: communication tightens up, people start assuming instead of asking, and technology tends to make the dysfunction worse rather than better.

One of us recently led an assessment of a client's matter-close process ahead of a planned technology migration, mapping how legal holds were issued, tracked, and released rather than how the written policy said they worked. It turned up something no one on the client side had fully realized: several holds had never been formally closed out. That wasn't a technology gap. It was a process that had quietly broken down across multiple teams, including technology and legal, with each function assuming someone else owned the close-out step. A new system with a cleaner interface wouldn't have caught that. It would have just carried the same gap forward, invisibly, into something newer.

The missing link: Integrating external partners

It's not just internal teams that need to be aligned. Another risk that gets overlooked constantly is how organizations view and interact with their external partners. Law firms, investigation providers, eDiscovery partners, forensic specialists, consulting experts — all can end up playing a critical role in a matter, and too many organizations still manage them as separate vendors rather than as part of the team. External partners end up working with limited visibility into internal decisions. Reporting formats don't match. Information moves through too many hands before it lands where it needs to. Knowledge that should stay with the relationship gets siloed on one side of it.

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There's a small example from our own working relationship that has stuck with both of us. Years ago, ahead of a holiday weekend, the client took a minute during a routine call to mention that the holiday was coming and outside counsel should plan around it, treating the team as unavailable except for a genuine emergency. It cost the client nothing to say, but it told the technology partner something about how the relationship worked in both directions, not just one — that the same consideration a client expects from a vendor could also flow the other way. That's the kind of thing that never shows up on a dashboard, and it's exactly what tells partners they're part of the team rather than a resource being managed.

On another project, weeks went into getting a large data update ready for a reporting tool that had to reflect it by a specific date. It wasn't until late in the process that anyone asked a simple question: had the tool's administrator been told? He hadn't. The administrator worked for an external vendor, and no one had thought to loop him in. It turned out he'd planned to be out of office on the exact day the update needed to go live. Once he knew, he arranged backup in time — a problem avoided by one overdue conversation, not better technology.

Giving partners real visibility pays off for a specific reason: it lets each side see the work through the other's seat. A vendor who understands what an in-house team is actually being measured on manages the relationship differently than one who has only ever seen a scope of work. The same holds in reverse — an in-house team that understands what a partner's purview covers stops asking questions that partner was never positioned to answer. That mutual context, more than any status

report, is what turns a vendor into a partner.

Get the expectations, workflows and communication shared across internal and external teams, and organizations gain real consistency and speed.

Connection is getting harder to build

Something has shifted in the last decade or so. The informal time that used to build trust as a side effect of just doing the work together is disappearing. Smaller teams, higher workloads, tighter budgets, and AI-driven efficiency are squeezing out exactly the moments where relationships used to form on their own: the longer call, the in-person handoff, the conversation that wasn't strictly necessary.

People are more inclined to have a call than to meet face-to-face, send an email instead of have a call, and message instead of send an email. Everyone expects quick answers and quick results. Technology is simply amplifying the issue.

We've watched this play out on the technology side in a specific way. A team recently asked how AI could help assess a dataset before anyone had defined what they were trying to achieve or what they were willing to spend. Nobody had a bad answer. Nobody had an answer at all. It's tempting to treat AI as a tool that can solve any problem, but it doesn't replace the slower work of defining the problem in the first place.

Relationships and trust can't be left to happen on their own anymore. They have to be scheduled and protected on purpose, the same as any other priority. As AI and leaner teams keep shrinking the space for that to happen naturally, all of us are going to need to be intentional about building the relationships that alignment depends on.

The future of legal operations

AI is going to keep pushing organizations to automate more legal and compliance work, and the upside is real. So is the risk. The organizations that get the most out of these investments won't be the ones with the flashiest technology. They'll be the ones that understand what technology can't do and that value the people around the tools.

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AI can summarize information. Technology can route work and surface patterns faster than any person could manually. What none of it can do is create trust between the people who actually have to rely on each other. That comes from people understanding their roles, from processes that are genuinely transparent and from technology that supports how a team has decided to work instead of quietly deciding it for them.

Focus only on the tools, and you're solving the wrong problem. Build alignment across people, process, and technology, and you get something sturdier: an operational foundation that holds up regardless of which platform comes next. You can automate a process. You can't automate trust.

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