



INSIGHT**DYNAMO**
INSIGHT-POWERED INTELLIGENCE

AUSTRALIA SURVEY REPORT

The Impact of Digital Maturity On Australian In-House Legal Teams

National research conducted by InsightDynamo and commissioned by Axiom

Research conducted in Q3 2024 and report produced Q4 2024

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EXECUTIVE SUMMARY

Executive Summary

There's no shortage of industry buzz, vendor promises, and legal leaders talking about digital transformation. Promises and predictions are being made about the impact of AI, generative and otherwise, and other legal tech.

Companies are investing billions in legal tech—gen-AI legal assistants; AI-infused tools; legal research; document, compliance, project, IP, contract lifecycle, matter, e-billing and spend management; workflow automation; e-discovery; digital hiring; predictive analytics; cybersecurity; and more—all with the expectation that it will

improve productivity, cut costs, and make work easier for their in-house legal teams.

But does it?

We decided to conduct **research to determine if legal tech is helping or hurting Australian legal teams** through its impact on productivity, efficiency, effectiveness, budgets, team well-being, and human resourcing.

To look into these questions and more, Axiom commissioned **InsightDynamo**, a leading market research organisation,

Executive Summary

to survey 200 in-house legal leaders across Australia on their use of the top 16 legal techs.

WE WANTED TO LEARN:

1. **What effects are being seen** at the intersection of managing talent, budget, and digital transformation?
2. **The impact of digital maturity** on Australian in-house legal teams.
3. **What it means to be digitally mature** in legal in Australia.

4. **What challenges are** faced by teams of varying digital maturity levels (high, middle, low)?

WE ALSO WANTED TO:

- Provide legal teams with the data they need to assess their own digital maturity relative to their peers.
- Give readers data that helps them make technology, personnel, and budgeting decisions while avoiding the unintended consequences of legal tech encountered during this research.

Executive Summary

For example, stress levels at the most **digitally mature** companies were high, with more lawyers looking to make a career move. But the digitally mature also had the smallest, most efficient teams.

One might ask how efficiency and high stress co-exist. We think stress is high because low-value work is being handled or aided by AI, leaving the high-value, long hours, high-stress matters as the day-to-day work the humans are left to deal with.

Indeed, 59% of digitally mature teams plan to invest more in FTEs, ALSPs, and legal ops—

in that order—to scale their teams' capacity (and hopefully reduce their stress).

The **digital centre** is the norm. Most of the respondents fall into this category with large, highly productive teams that don't take full advantage of the substantial amount of authorized legal tech at their disposal.

Despite their reported size and productivity, they're increasing budgets almost equally to their more mature colleagues and planning to hire more FTEs, increase outside counsel spend, and scale their capacity cost-efficiently with ALSPs.

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As might be expected, **digitally immature** teams reported the **lowest productivity, the biggest teams, the most FTEs, and the slowest budget growth**. But they also have the least stressed, most satisfied teams and the lowest risk of attrition.

Despite having the largest teams, they're under water resource wise. Their **top three investments** to add capacity and specialization are FTEs, ALSPs, and technology, respectively.

The Bottom Line: If you read no further,

here's the scoop:

The research found legal tech does make Australian legal teams (and, ostensibly, those in other regions) more productive, efficient, and aligned to the business.

But digital maturity has a business cost, too: The more digitally mature a team gets, the greater the stress on the in-house legal team, and the greater the motivation among individual lawyers to find a more rewarding career path.

Executive Summary

One solution is to **reduce the load on the in-house team** with tech-savvy lawyers who have in-house experience and can help right-size the team as needed.

The research indicates that's going to be a blend of hiring FTEs, retaining outside law firms, and partnering with an ALSP (such as Axiom) for high-quality flexible legal talent on demand.

All three groups studied reported increasing budgets for these line items, plus legal ops and technology, although with varying levels of investment and prioritization (as you'll see

in the charts).

Achieving the smallest, most efficient team isn't necessarily achieving the optimal team.
No legal leader wants efficiency at the cost of great stress.

Efficiency that helps create a rewarding environment that meets business goals?

That's the digitally mature organisation we all want to work in.

Executive Summary

Before sharing this report, we ask that you [share this link](#) instead so that we get to know, and hopefully help your friends and colleagues as well as your team.

Thank you for downloading this report and supporting Axiom's commitment to providing the in-house legal industry and select law firms with data that helps them make more informed decisions at the intersection of managing talent, budget, and digital transformation.



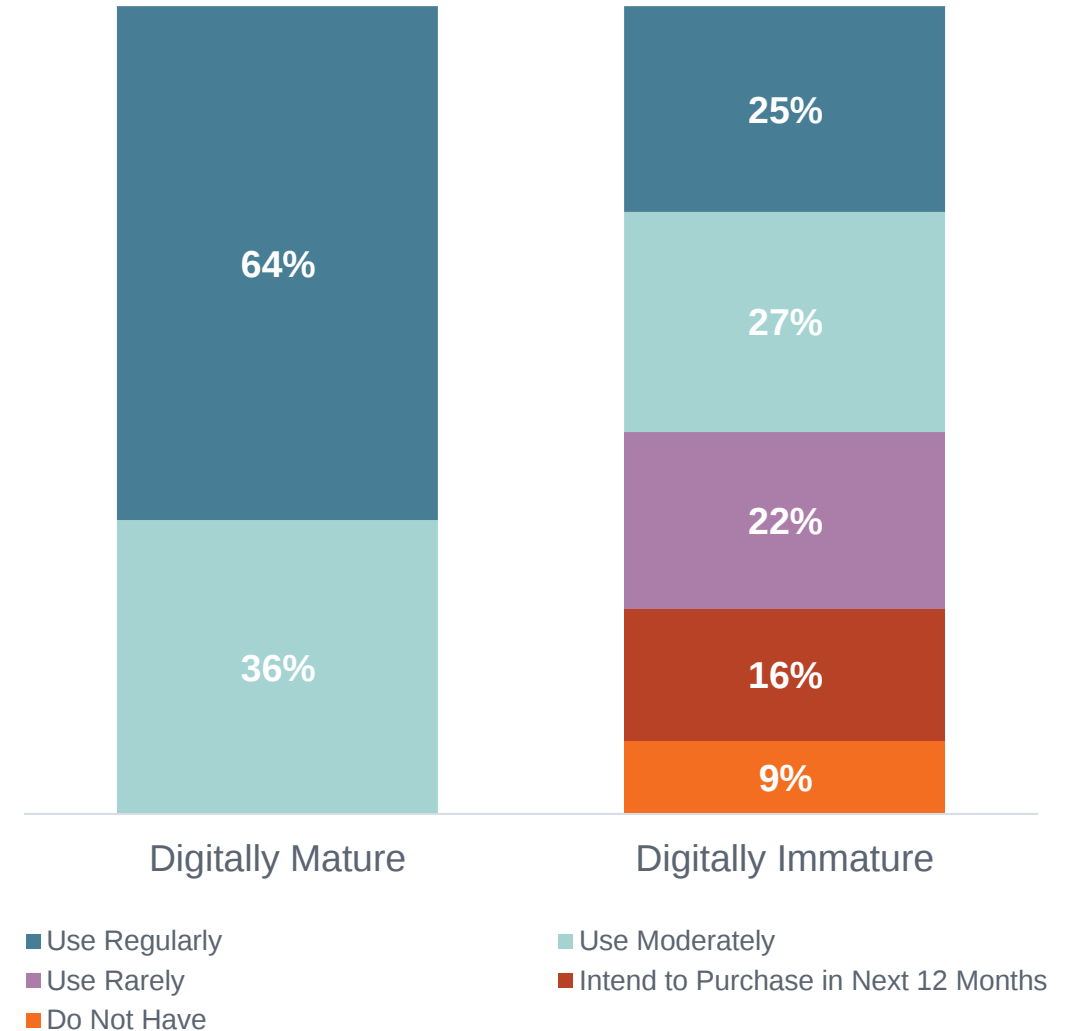
INSIGHTS INTO DIGITAL MATURITY

What is Digital Maturity?

Teams with higher legal tech access and usage are more digitally mature.

- **Example:** Virtual legal assistants are generative- (or otherwise) AI-powered assistants that handle routine legal tasks, freeing lawyers to focus on more complex matters.
- **Digitally mature organisations** have access to the technology and notably higher daily usage (more than double).
- **Digitally immature organisations** don't have or widely use the tech. Among those that do have access, there's relatively low usage, with just 25% of respondents using the AI tech regularly.

Use of Virtual Legal Assistants





DIGITAL MATURITY IMPACT

The Axiom 2024 Digital Maturity Index for Australia

Most digitally mature respondents (52%) were led by Chief Legal Officers. The majority of respondents landed in the digital centre and were led by a GC (38%), while nearly all (88%) of the digitally immature were led by either a GC, DGC, or AGC.

DIGITALLY IMMATURE

Don't have access to several tested technologies.

Legal tech use is moderate or rare.

Are mostly (88%) led by GCs, DGCs, or AGCs.



28% of responding companies are **digitally immature.**

DIGITAL CENTRE

Have access to most technologies tested.

Technology use is moderate.

Nearly 40% are led by a GC, 27% by a DGC, 23% by a CLO.



56% of responding companies are in the **digital centre.**

DIGITALLY MATURE

Have access to all technologies tested.

Regularly use most technologies.

Over half (52%) are led by a CLO.



17% of responding companies are **digitally mature.**

DIGITALLY MATURE

Digital maturity has a positive impact on productivity, department size, hiring ability, and effectiveness of law firms and flexible legal service providers (ALSPs).



94% Very + Extremely Productive

Digitally mature legal departments reported the highest productivity.

8% 16 to 20+ team members

They have the most efficient teams.

81% Mostly + Completely Effective

They consider ALSPs to be as effective as pricier FTEs and law firms

DIGITALLY MATURE

But digital maturity has a negative impact on stress, burnout, and flight risk. Despite that, digitally mature team leaders are the most aligned with technology leadership, compared to other C-suite seats.



36% Moderately, Very, or Extremely Stressed

A third of digitally mature legal teams are stressed out. Stress may lead to burnout.

73% Actively Searching for a New Position

Almost three out of four are looking for a new job, and 18% are open to an offer.

64% Completely Strategically Aligned

Alignment with technology leadership was the highest among all groups studied.

DIGITAL CENTRE



Welcome to the norm.
Most in-house legal teams
are in the digital centre.
They're big. They're busy.
Their budgets are
growing. Their top three
investments are FTEs, law
firms, and flexible legal
talent providers/ALSPs.

78% Very, or Extremely
Productive

Legal departments at the digital centre
reported high productivity.

34% Have more than 20
team members

Their teams are large and getting larger.
Half reported 6 to 15 teammates.

62% Mostly + Completely
Effective

They also consider ALSPs to be as
effective as pricier FTEs and law firms.

DIGITAL CENTRE

As with the digitally mature, stress and flight risk are real problems at the digital centre.

Alignment with technology leadership is low, although not the lowest among those surveyed.



58% Moderately, Very, or Extremely Stressed

Legal teams at the digital centre have the highest stress levels of all respondents.

72% Very or Completely Satisfied

The digital centre has high job satisfaction, but it's 25% lower than the digitally mature.

41% Actively Searching for a New Position

Despite their high job sat, almost two in five are looking for a new job, 29% are open to an offer.

DIGITALLY IMMATURE



Digital immaturity has a sweeping impact on productivity (it's low), department size (it's large), and demand for more staffing resources (it's high, they lack the right talent, and half said hiring is hard).

62% Very + Extremely Productive

Digitally immature legal departments reported the lowest productivity.

75% Have 11 to 20+ FTEs

They have the most FTEs and the largest teams, yet 60% report they're under-resourced.

50% Mostly + Completely Effective

Half of digitally immature respondents reported ALSPs are just as effective as FTEs and law firms.

DIGITALLY IMMATURE

But digital immaturity has a peculiar positive upside: notably lower stress and very low flight risk. The flip side: Strategic alignment with technology leadership is the lowest.



0% Extremely Stressed

The only teams to report no extreme stress; 7% said “Very” stressed, 36% said “Moderately” stressed.

5% Actively Searching for a New Position

And 84% of the digitally immature report high job satisfaction.

13% Completely Strategically Aligned

Alignment with technology leadership is by far the lowest among all groups studied.



DIGITAL MATURITY LEGAL TEAM PROFILES

The Digitally Mature

- Smaller teams
- Bigger budgets
- Higher productivity
- High stress

Have the
highest
productivity

Have the
fewest FTEs

Have a high
percentage
of stressed-
out lawyers

Have
lower job
satisfaction

Have more
lawyers
hunting for a
better gig

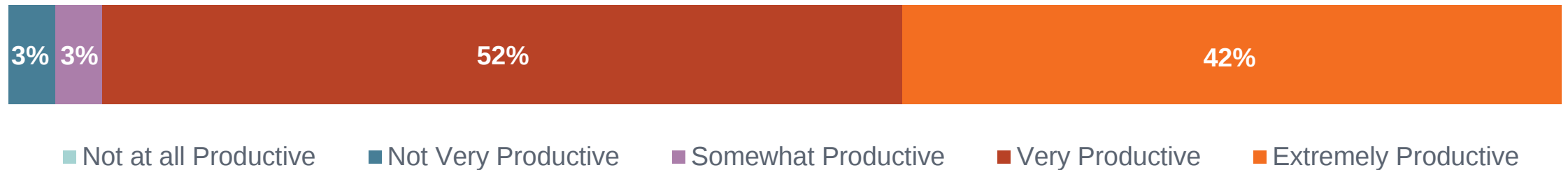
Top three
budget
investments:
FTEs, ALSPs,
and legal ops

Are tightly
aligned with
the tech C-
suite

Digitally Mature Departments: **PRODUCTIVITY**

High productivity from small, efficient departments is the hallmark of the most digitally mature legal departments.

Productivity



Department Size: Number of FTEs and Productivity Percentage



Digitally Mature Departments: **RESOURCING**

Proper resourcing—the right blend of legal tech, lawyers, and external legal services—is the fuel for high productivity. These teams have ample access to resources, but administritivia, gaps in legal specialists, and org design are their top productivity killers.

Resourcing



■ Significantly Under Resourced ■ Somewhat Under Resourced ■ Slightly Under Resourced ■ Properly Resourced

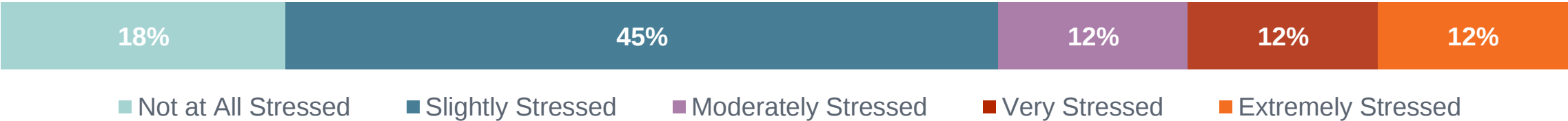
Productivity Killers



Digitally Mature Lawyers: **STRESS**

High stress levels (36%) is another hallmark of digitally mature teams, caused by a lack of growth opportunities, pressures of overseeing external legal services and controlling costs, frequently shifting priorities, and feeling unsupported or undervalued.

Stress Level



Stress Catalysts



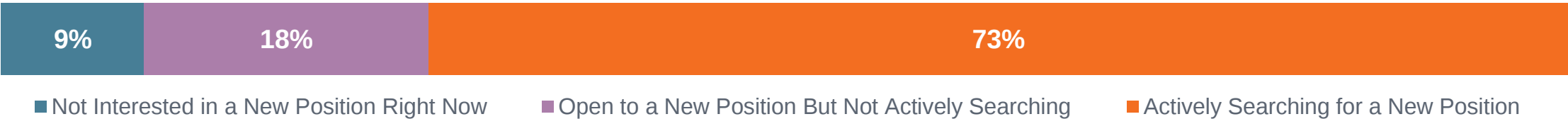
Digitally Mature Lawyers: **FLIGHT RISK**

Job sat among digitally mature legal leaders is very high, yet nearly three out of four are looking for a new job, and 18% are open to an offer. Less than 10% are happily situated. They might see their digital skills as marketable or be seeking a more traditional environment.

Job Satisfaction



Current Job Search Status

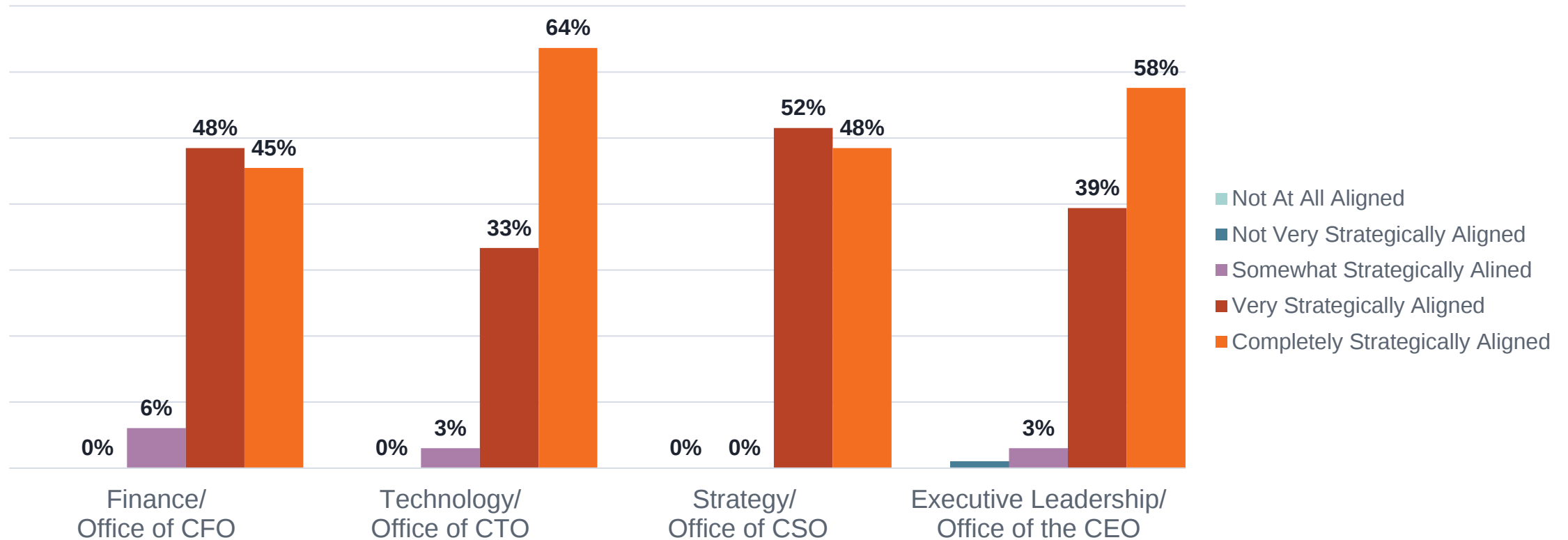


Job Title



Digitally Mature Organisations: **ALIGNMENT**

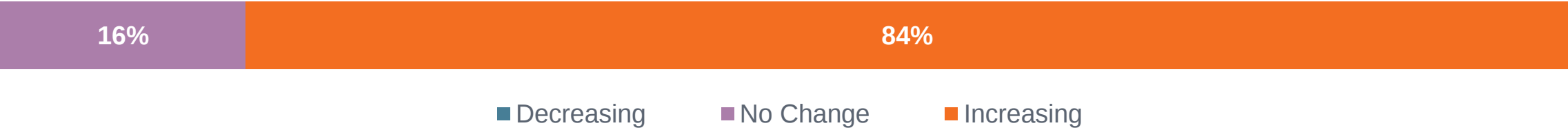
No surprise: Digitally mature teams are much more likely (64%) to report they are completely aligned strategically with their CTO vs. other C-suiters.



Digitally Mature Organisations: **BUDGETS**

Budgets are going up in digitally mature departments. The money will flow equally to more FTEs, flexible legal talent providers/ALSPs, legal ops, and law firms, less to legal tech—as one could expect among teams that already made large tech investments.

Future Budgets



Budgets Projected to Grow in Next Budget Cycle



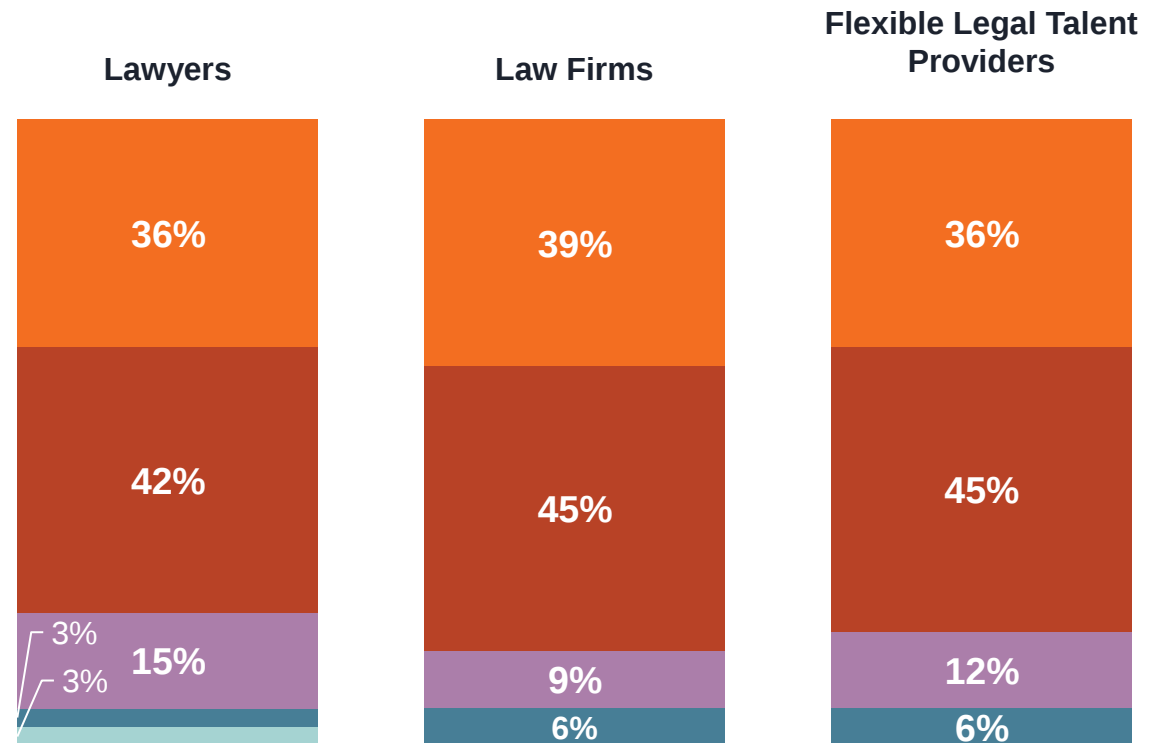
Digitally Mature Organisations: **TALENT**

Using a mix of FTEs, law firms, and flexible legal talent providers/ALSPs makes sense for digitally mature teams, who find them mostly to completely effective. But nearly three out of four respondents (73%) said it's hard to find lawyers for full-time work.

Difficulty Hiring Lawyers



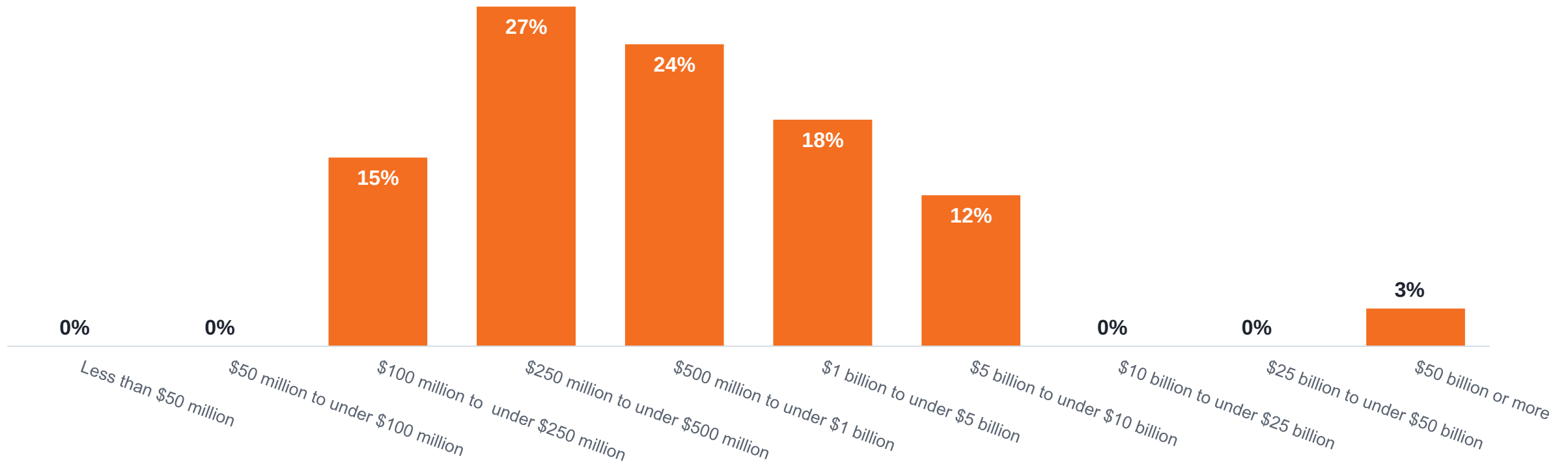
Effectiveness of Hiring...



Digitally Mature Organisations: **REVENUE**

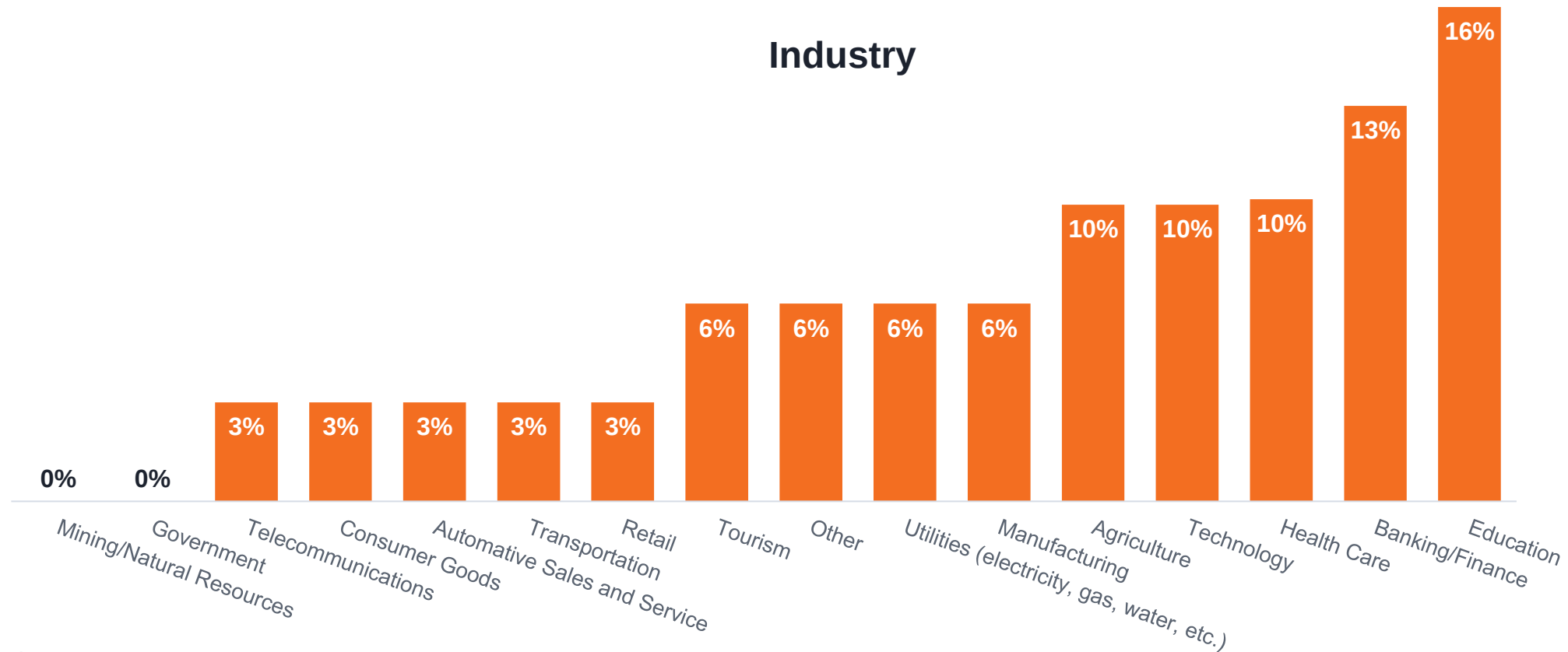
The most digitally mature organisations reported revenue between \$100 million and \$10 billion AUD.

Annual Revenue (AUD)



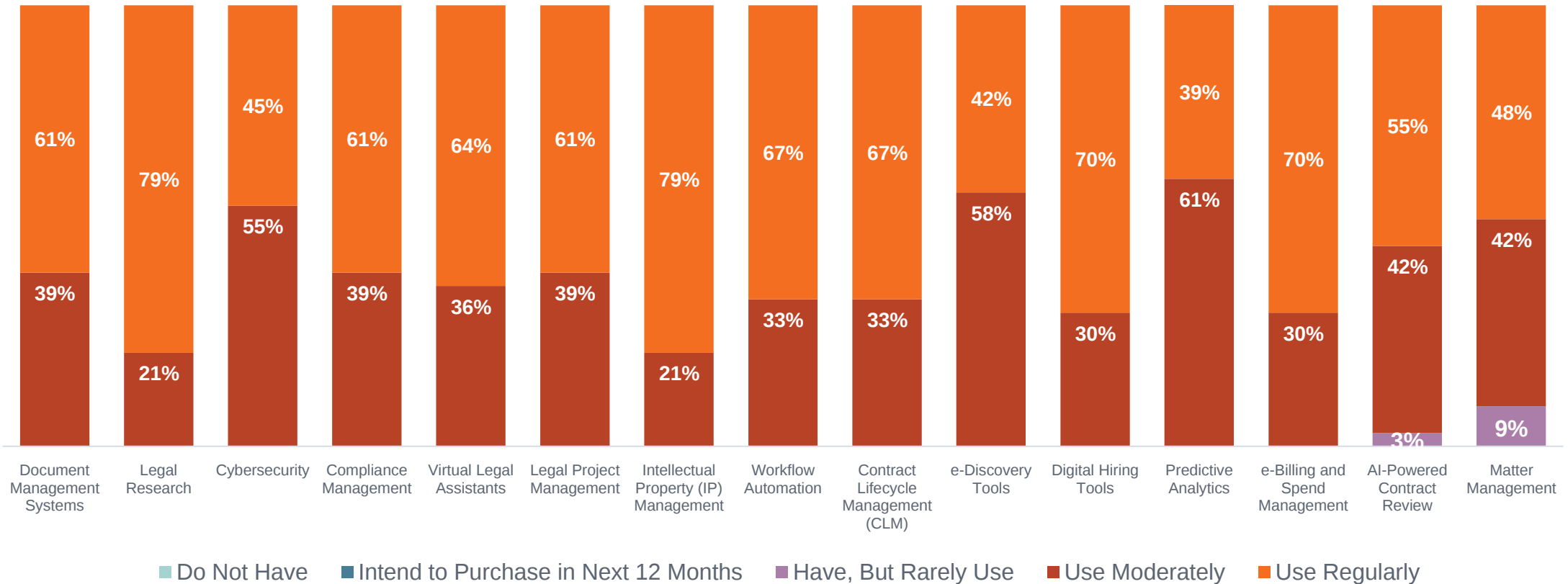
Digitally Mature Legal Teams: **INDUSTRY RANKING**

Education, banking/finance, healthcare, technology, and agriculture lead the way with the most digitally mature legal departments, representing 60% of respondents across 16 Australian industries studied.



Digitally Mature Teams: **LEGAL TECH PROFILE**

Digitally Mature organisations already have all the cool legal tech and put it to use at the highest rate.



The Digital Centre

- Big, productive teams
- Growing budgets
- Modest flight risk
- Under pressure to mature digitally

High job satisfaction

Top stressor 1:
Pressure to use legal tech

Top stressor 2: Managing external legal services

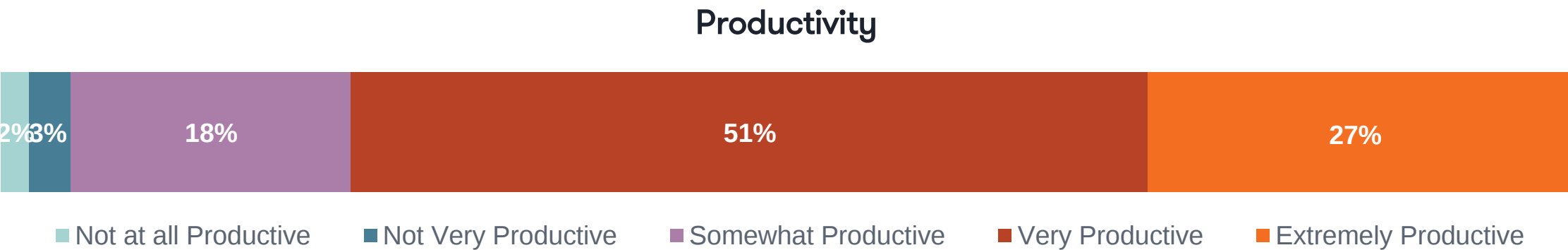
2 in 5 are actively looking for jobs

More aligned to the CEO, less to CTO, CSO, or CFO

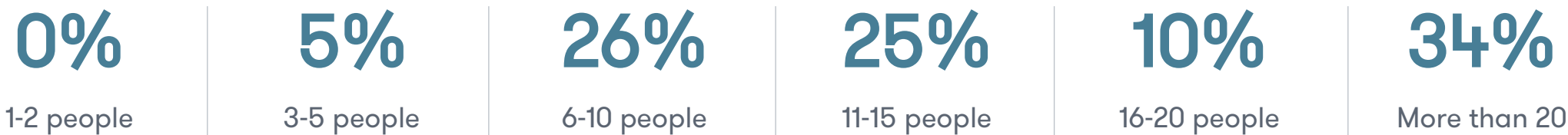
Budgets are growing; going to FTEs, law firms, and ALSPs

Departments at the Digital Centre: **PRODUCTIVITY**

Teams at the digital centre are mostly large and productive. A third (34%) have more than 20 teammates. Half (51%) have 6 to 15 teammates, 10% have 16 to 20, and only 5% have just 3 to 5 teammates. No respondents here reported flying solo or with a sidekick.



Department Size: Number of FTEs and Productivity Percentage



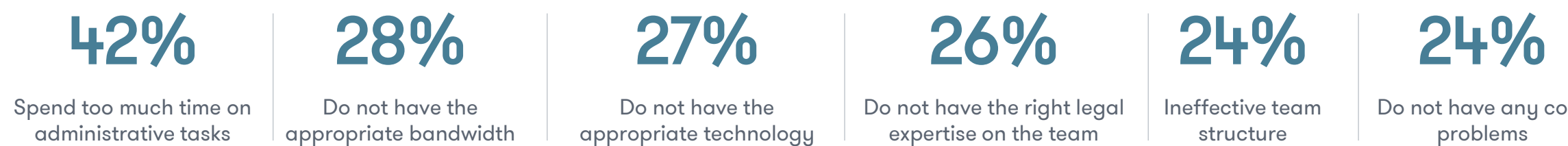
Departments at the Digital Centre: **RESOURCING**

Half of the teams at the digital centre reported they're properly resourced, half said they're not. Of those, 11% are in a serious resource crunch, while the rest said they're slightly underwater. Productivity killers are evenly distributed except for high administtrivia.

Staffing Resources



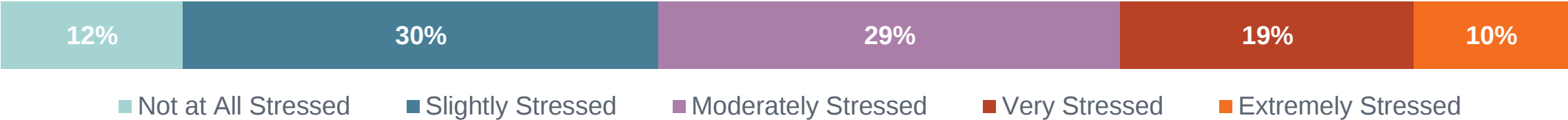
Productivity Killers



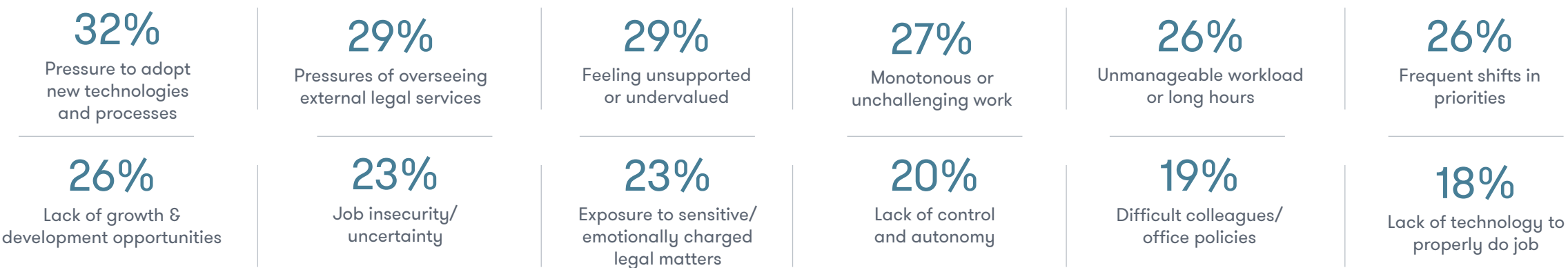
Lawyers at the Digital Centre: **STRESS**

Stress levels are notably lower at the digital centre, with the biggest drivers being pressure to adopt new legal tech (surprise!), pressures of overseeing external legal services and related cost control, and feeling unsupported or undervalued.

Stress Level



Stress Catalysts



Lawyers at the Digital Centre: **FLIGHT RISK**

The digital centre is mostly led by GCs (40%), DGCs (27%), and CLOs (23%). Despite moderate to extreme stress, they're mostly (72%) satisfied in their roles. Two in five are now looking; nearly 30% would consider a new position if the right opportunity arose.

Job Satisfaction



Current Job Search Status

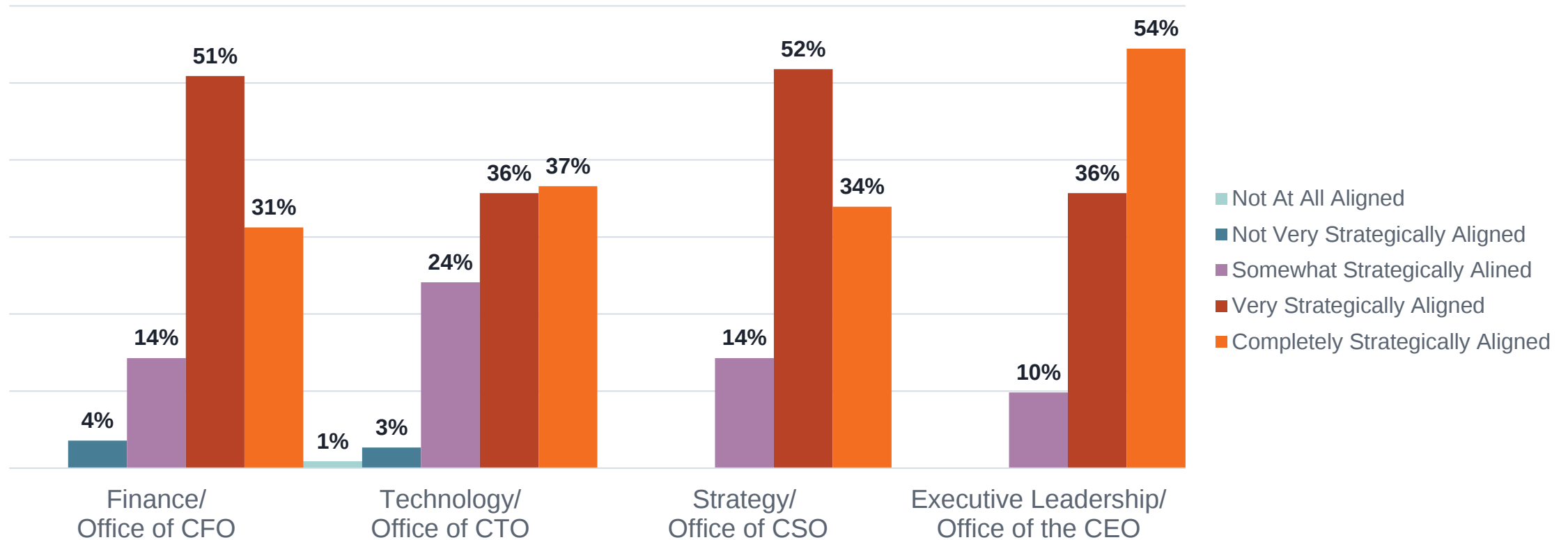


Job Title



The Digital Centre: **ALIGNMENT**

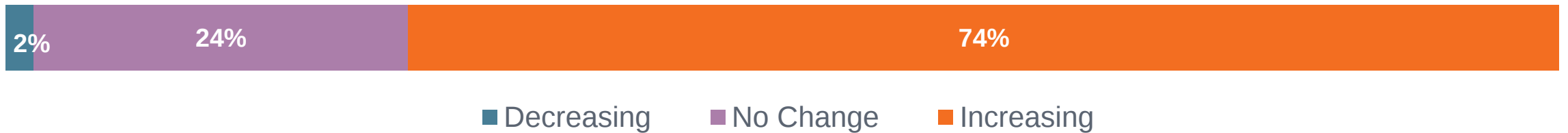
The digital centre is nearly 30 points behind the digitally mature in terms of alignment, with just 37% of digital centrist reporting their teams are completely aligned strategically with their organization's technology leadership.



The Digital Centre: **BUDGETS**

Budgets are going up here, too: 74% in the digital centre anticipate an increased budget versus 84% of the digitally mature. Legal tech is earmarked by nearly half (46%) of respondents, aligning to the pressure teams reported to achieve greater digital maturity.

Future Budgets



Budgets Projected to Grow in Next Budget Cycle



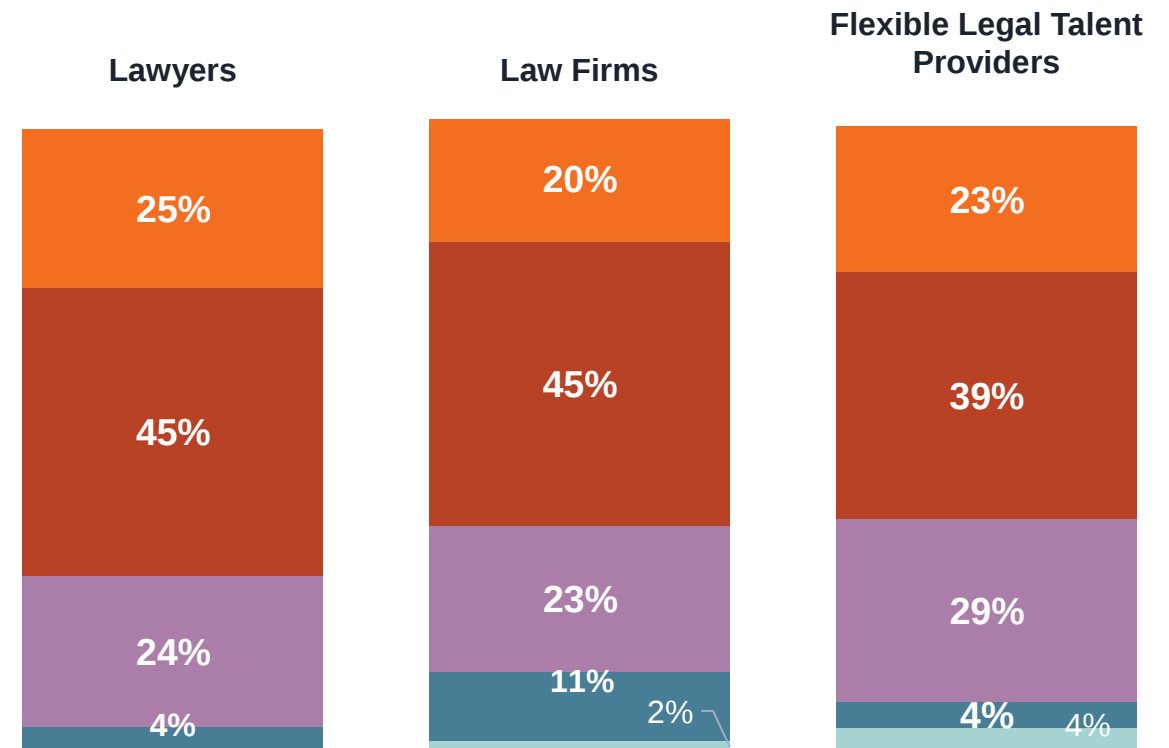
The Digital Centre: **TALENT**

The digital centre has a much easier time finding FT legal talent compared to the digitally mature and immature. Just two of every five (43%) centrists said it's hard to find full-time lawyers, compared to 73% of the digitally mature and half of the digitally immature.

Difficulty Hiring Lawyers

12%	Not at all difficult
46%	A little bit difficult
31%	Somewhat difficult
11%	Very difficult
1%	Extremely difficult

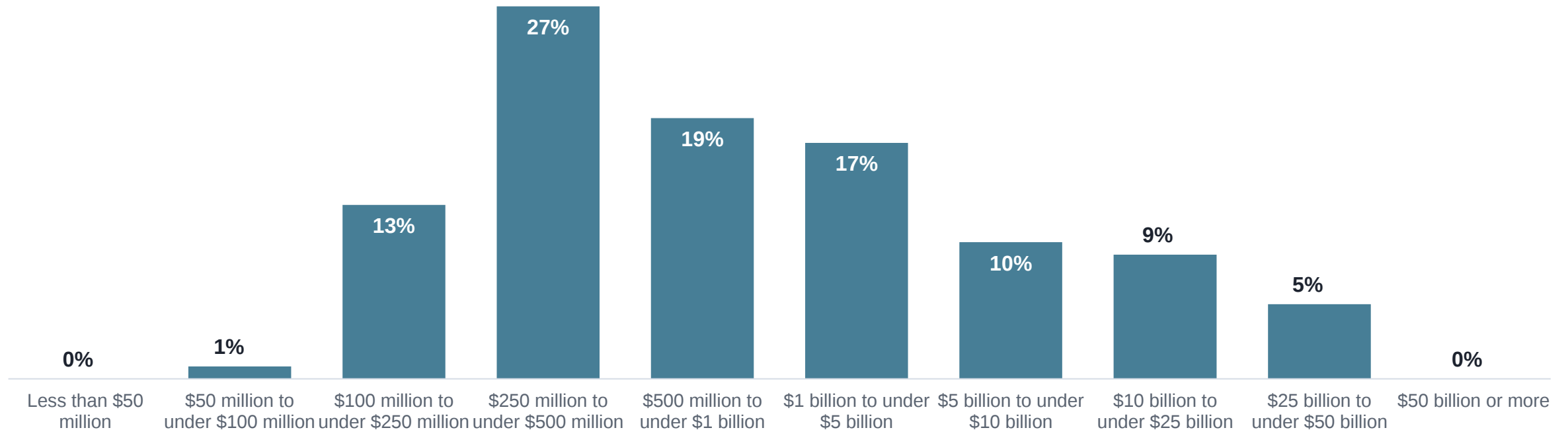
Effectiveness of Hiring...



Organisations at the Digital Centre: **REVENUE**

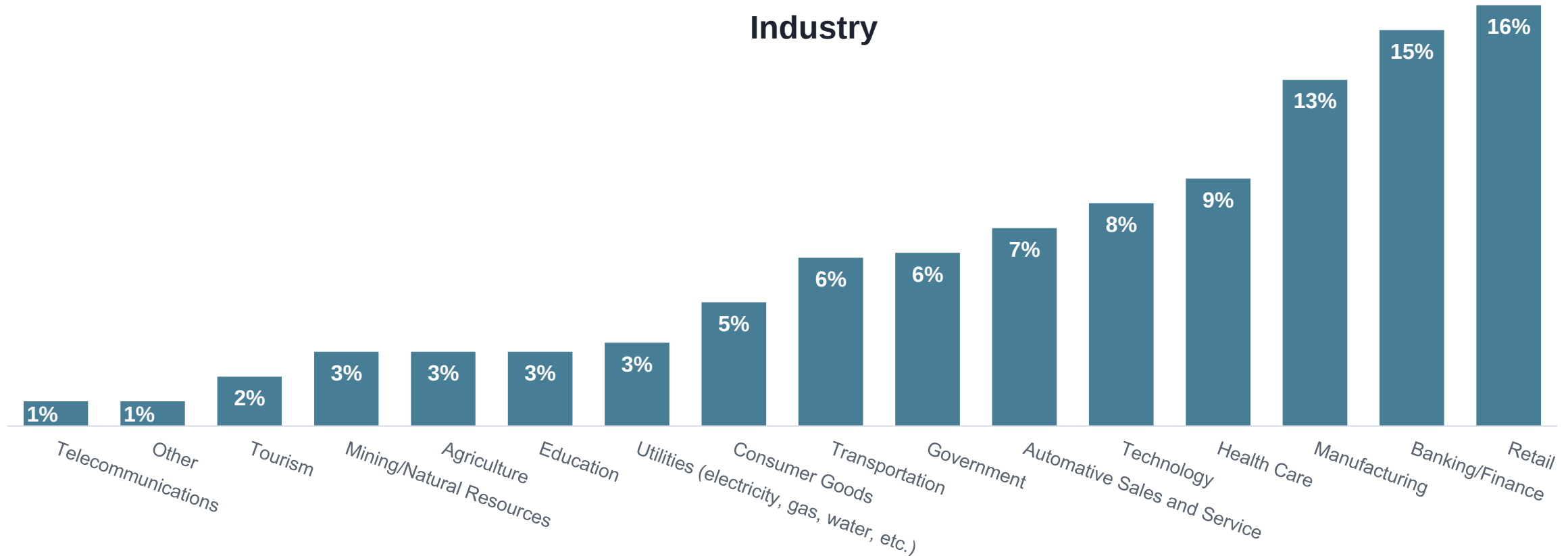
Two-thirds of digital centre respondents had revenue between \$100 million and \$5 billion—they're the centre of the digital centre. Runners up: Orgs with \$5 to \$25 billion in revenue (19%).

Annual Revenue (AUD)



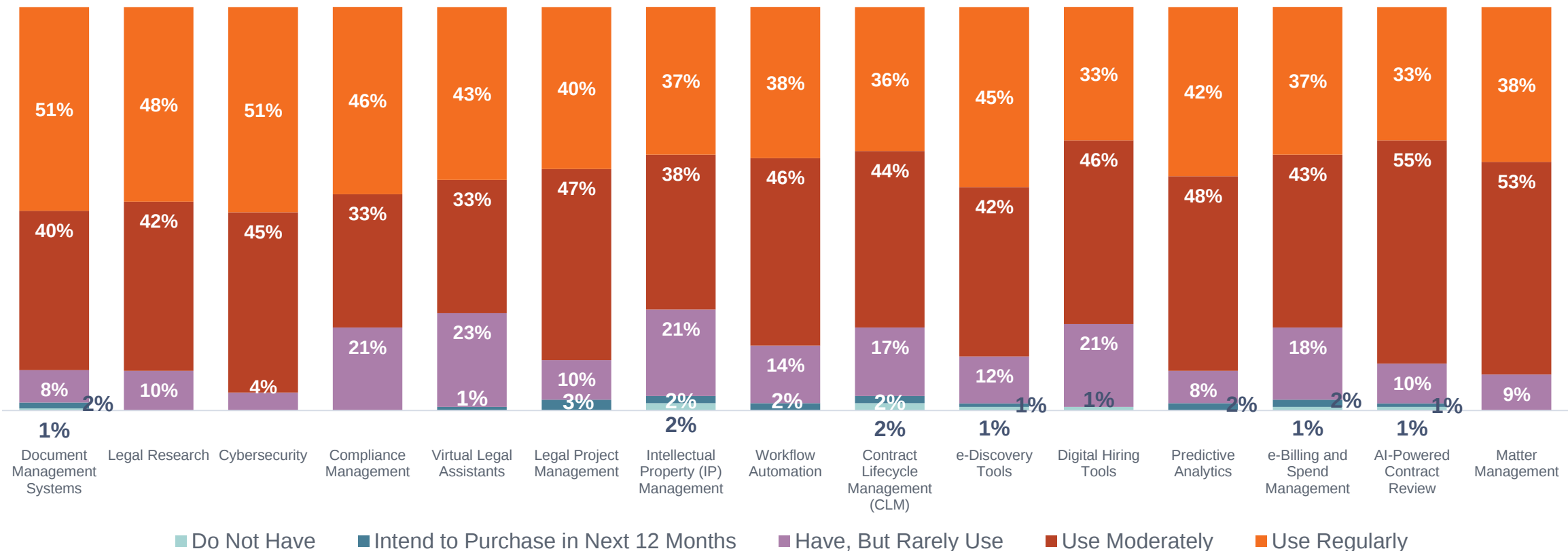
Orgs at the Digital Centre: **INDUSTRY RANKING**

Of the 16 industries studied, retail, banking/finance, and manufacturing made up 44% of respondents, followed by healthcare (9%), technology (8%), auto sales and service (7%), government (6%), and transportation (6%).



Orgs at the Digital Centre: **LEGAL TECH PROFILE**

Companies at the digital centre have most of the 16 legal technologies studied. They're likely to use tech moderately, which is another way of saying that few of their legal tools are used regularly (i.e., institutionalized in workflows and policy).



The Digitally Immature

- Lowest productivity
- The largest teams with the most FTEs
- Three times more likely (15% vs. 5%) to find ALSPs to be a completely effective solution vs. FTEs and law firms

Fewer
budgets
growing

Least likely to
be looking for
a new job

Legal tech
investment is
a top priority

Lowest stress
levels

Digitally Immature Organisations: **PRODUCTIVITY**

Under two-thirds of digitally immature teams reported high productivity (62%), the lowest among the groups, leaving a lot of potential on the table. That compares to 78% of the digital centre and 94% of the digitally mature reporting high productivity. Team sizes: Big.

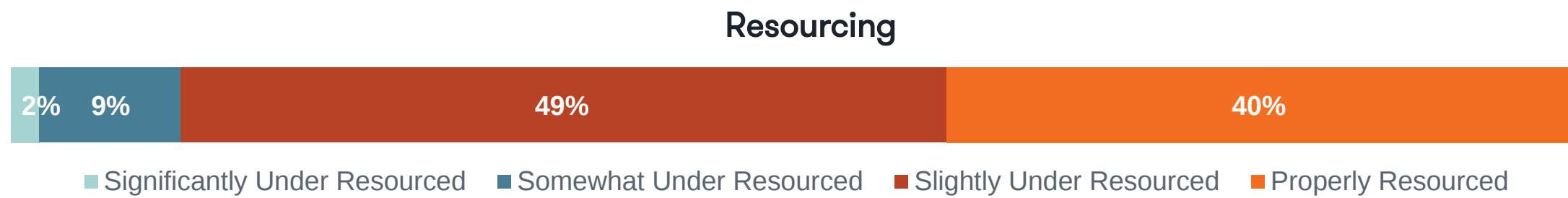


Department Size: Number of FTEs and Productivity Percentage



Digitally Immature Organisations: **RESOURCING**

It's the 60/40 rule here: 60% of digitally immature teams are underwater, 11% of them deeply. Their top productivity killers are knowledge gaps, a broken team structure, and drudgery. Even with the largest teams, they're thin on specialists when they need them.



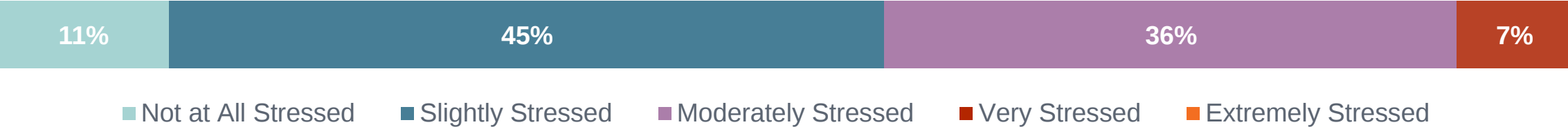
Productivity Killers



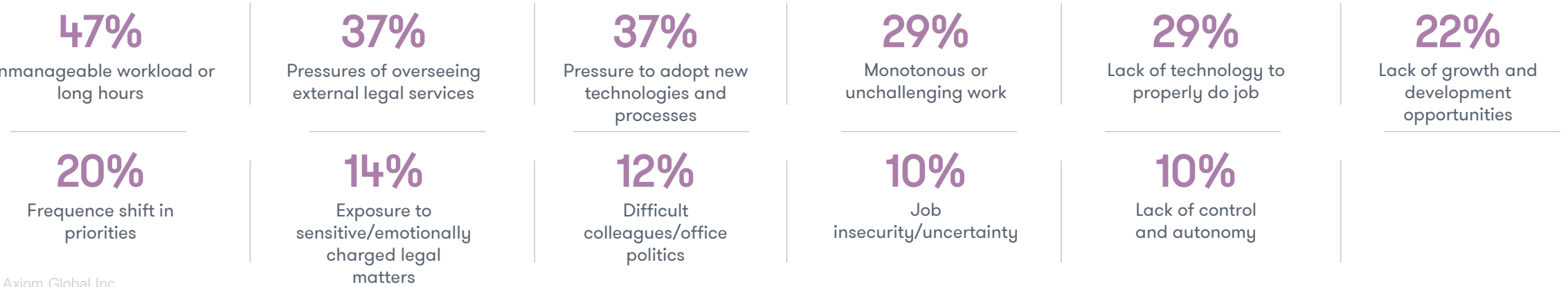
Digitally Immature Lawyers: **STRESS**

Digital immaturity has its upside. Stress levels are lowest among digitally immature teams, with 56% reporting little to no stress. Most of the rest said they’re moderately stressed, with only 7% reporting high stress and none reporting extreme stress.

Stress Level



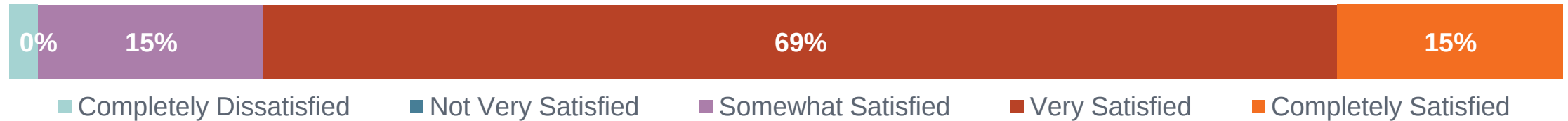
Stress Catalysts



Digitally Immature Lawyers: **FLIGHT RISK**

GCs, DGCs, and AGCs head these teams; just 7% are CLOs, and 5% are Assistant GCs. Job sat is among the highest among groups studied, with 84% reporting they're happy. Just 5% are actively seeking a new position, but more than half are ripe for recruiters' plucking.

Job Satisfaction



Current Job Search Status

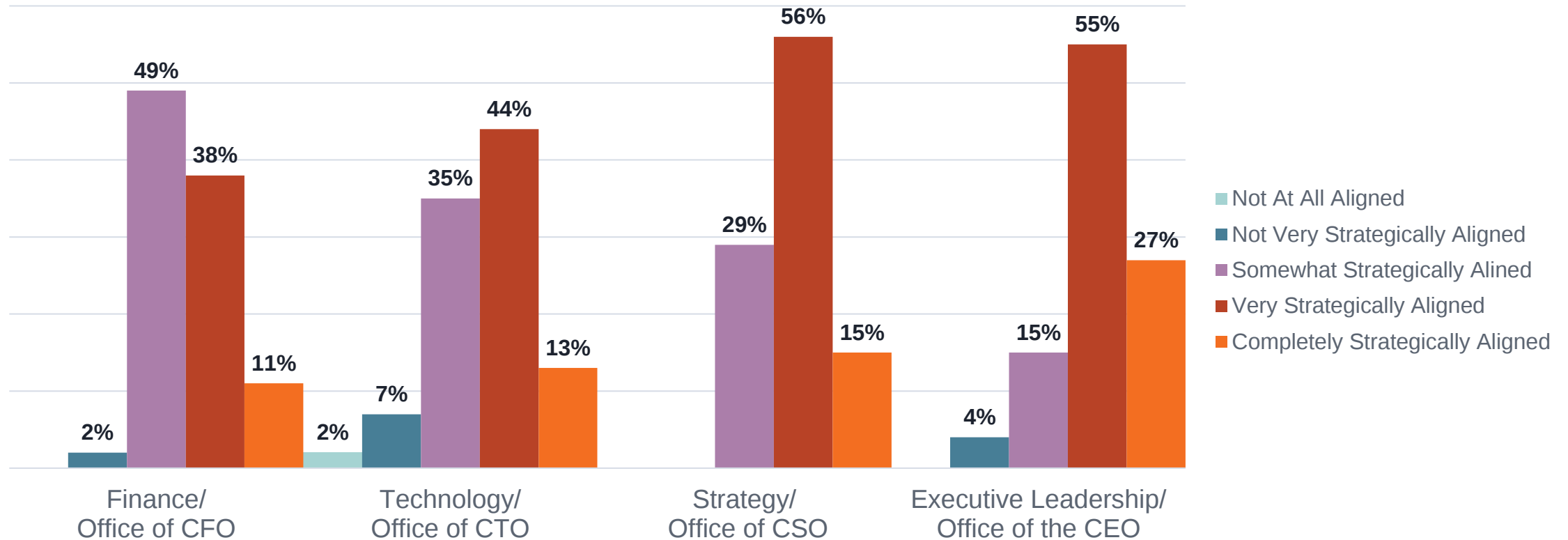


Job Title



Digitally Immature Organisations: **ALIGNMENT**

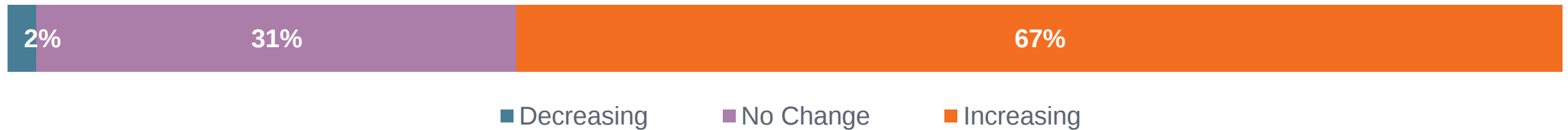
Only 13% of the digitally immature report being completely aligned strategically with tech leadership, compared to 64% of the digitally mature and 37% at the digital centre.



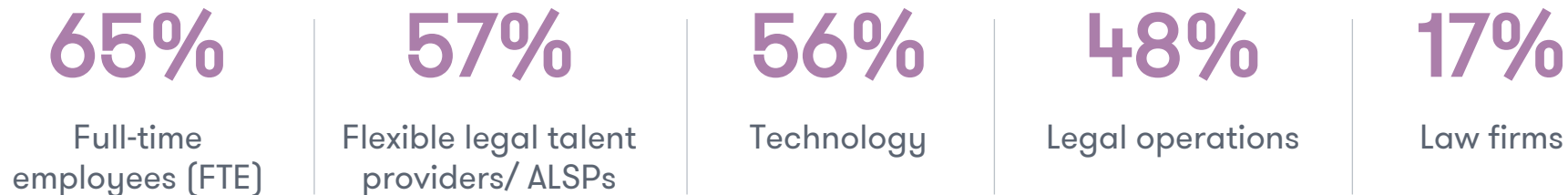
Digitally Immature Organisations: **BUDGETS**

Here too budgets are going up—but among 29% fewer organisations. The money is largely going towards FTEs, flexible legal talent providers/ALSPs, technology, and legal ops. The budget for law firms is expected to grow among only 17% of organisations.

Future Budgets



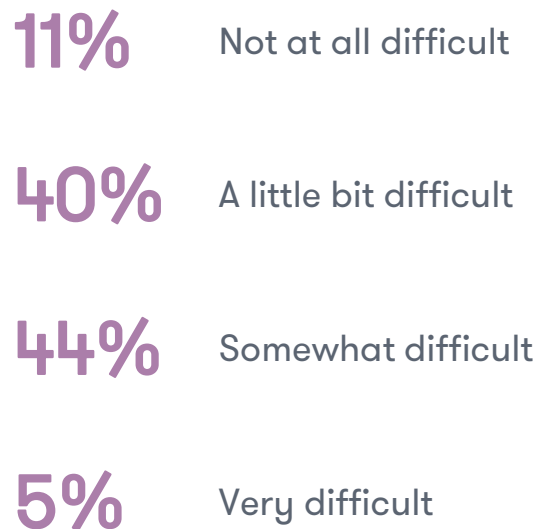
Budgets Projected to Grow in Next Budget Cycle



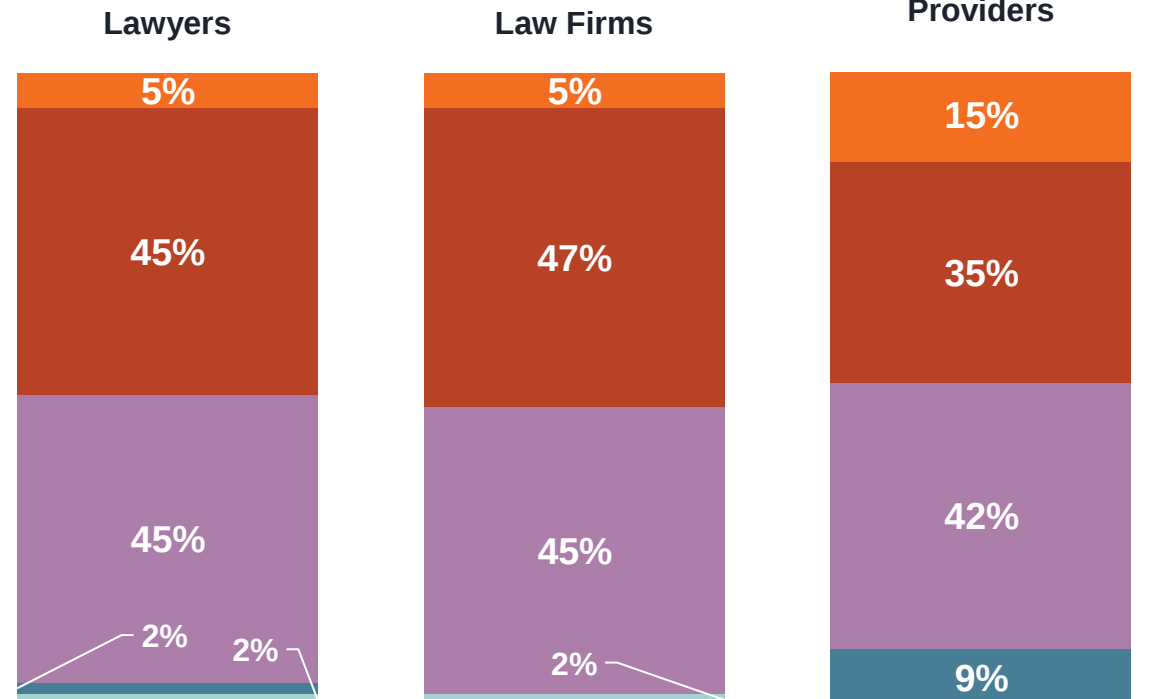
Digitally Immature Organisations: **TALENT**

Digitally immature organizations were split (49%/51%) over just how hard it is to find the FT lawyers they need. Compare that to three of every four of the digitally mature (73%) who said it was hard, and just two out of every five at the digital centre (43%).

Difficulty Hiring Lawyers



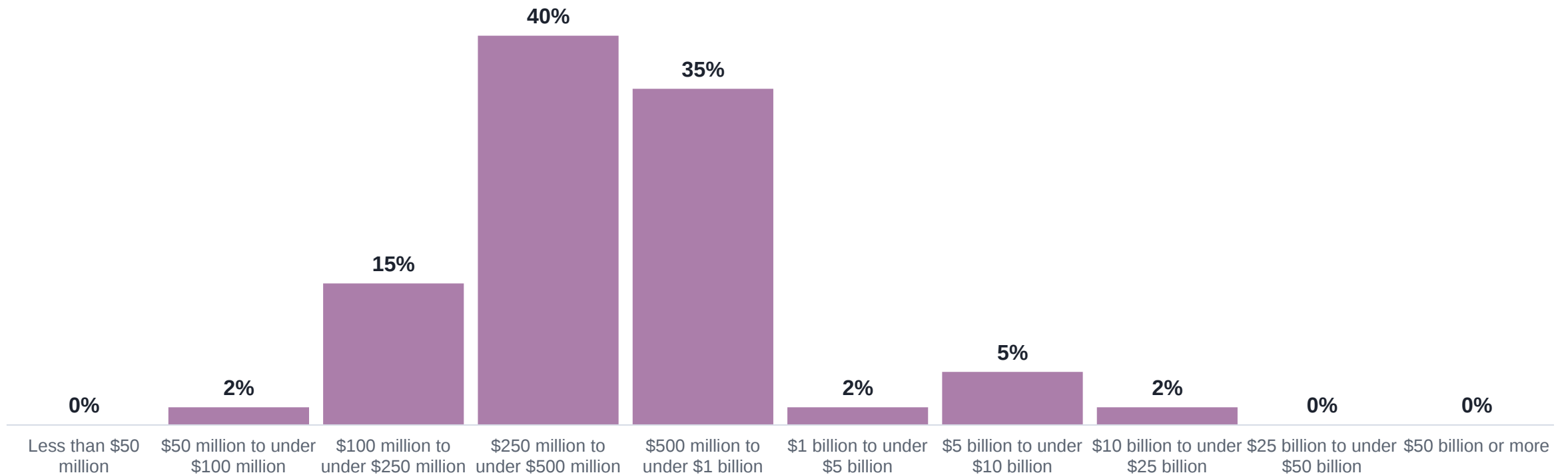
Effectiveness of Hiring...



Digitally Immature Organisations: **REVENUE**

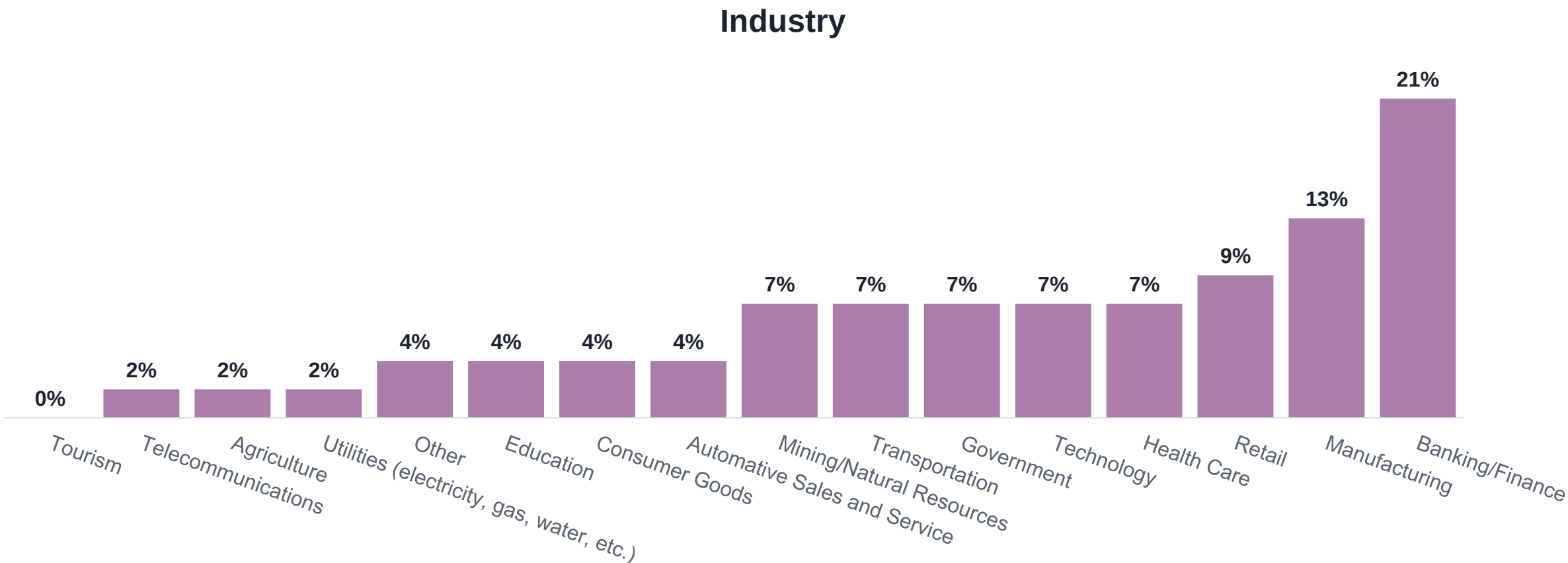
The most digitally immature organisations are mid-market companies who reported revenue between \$100 and \$500 million.

Annual Revenue (AUD)



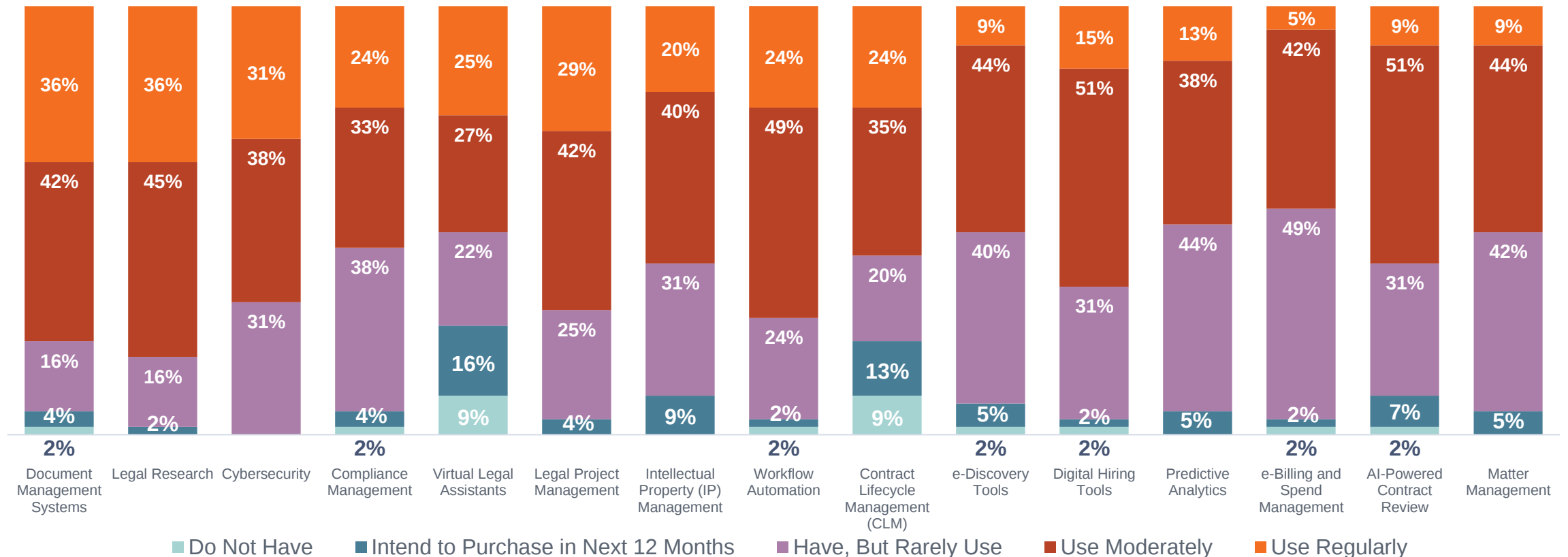
Digitally Immature Legal Teams: **INDUSTRY RANKING**

Banking/finance, manufacturing, and retail again round out the top three, comprising 43% of the digitally immature among the 16 Australian industries studied.



Digitally Immature Teams: **LEGAL TECH PROFILE**

A mixed bag. Most of the 16 legal technologies studied are available in-house, but 16%-49% are rarely used, 35%-51% are used moderately, and the highest regular use is 35% for document management.





RESEARCH METHODOLOGY

Research Method for Digital Maturity Classification

- Respondents were asked to rate their organisation's use of 16 legal technologies.
- Mean scores for technology usage were calculated.
- The distribution of the scores clustered between 2.00 and 4.93 on a 1 to 5 scale.
- InsightDynamo identified score terciles.
- Those whose mean scores were in the upper tercile were categorized as **DIGITALLY MATURE**.
- Those whose mean scores were the middle tercile as the **DIGITAL CENTRE**.
- Those whose mean scores were in the bottom tercile as **DIGITALLY IMMATURE**.

Research Methodology

Axiom commissioned InsightDynamo, a market research and strategy firm, to field an online survey of 200 Australian in-house legal leaders and professionals.

To qualify, respondents had to meet the following profile:

- Work as an in-house legal professional
- Have a senior leadership role in their department
- Have decision-making authority over budgeting, hiring/firing, or technology purchasing

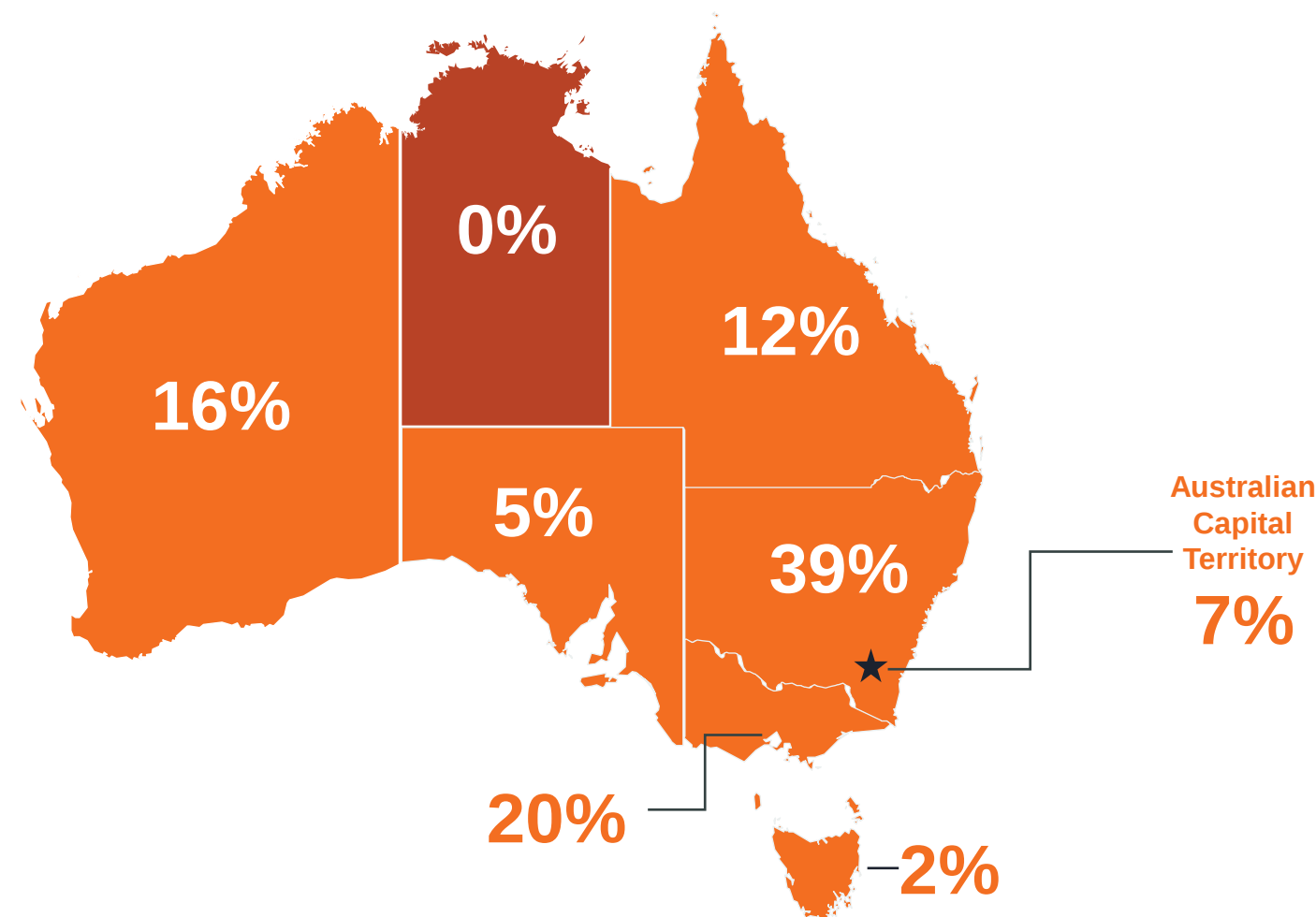
The survey was fielded and data was collected between August 22 through September 3, 2024. This research report was written in October 2024.

The research presents a representative cross-section of Australian in-house legal teams and reflects statistical testing conducted at the 95% confidence interval.

Note: Some percentages might not sum to 100% due to rounding.

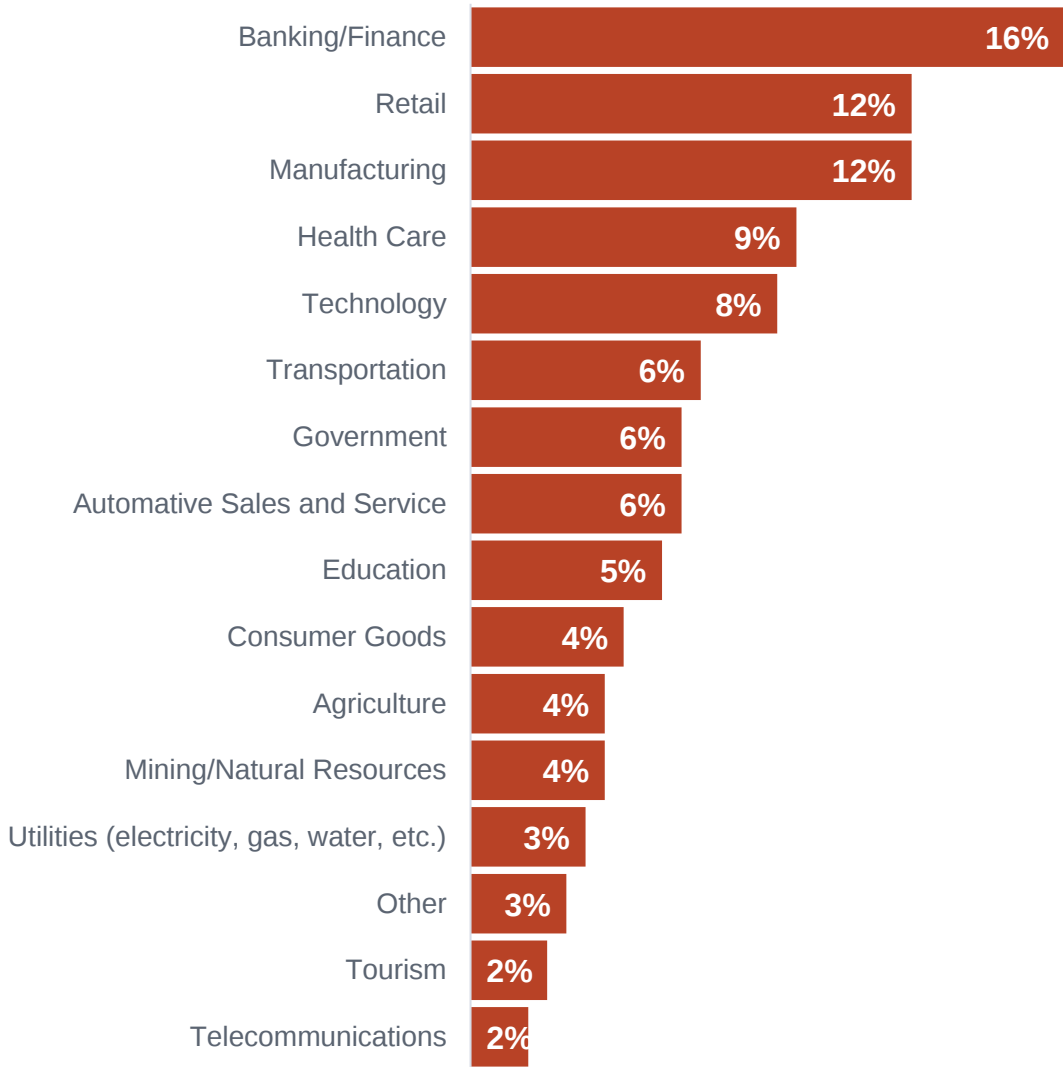
Location of Responding Companies

All regions except The Northern Territory were represented



Industries Represented

Respondents representing nearly all of the Australian economy, across 16 industries, engaged with the research questionnaire.

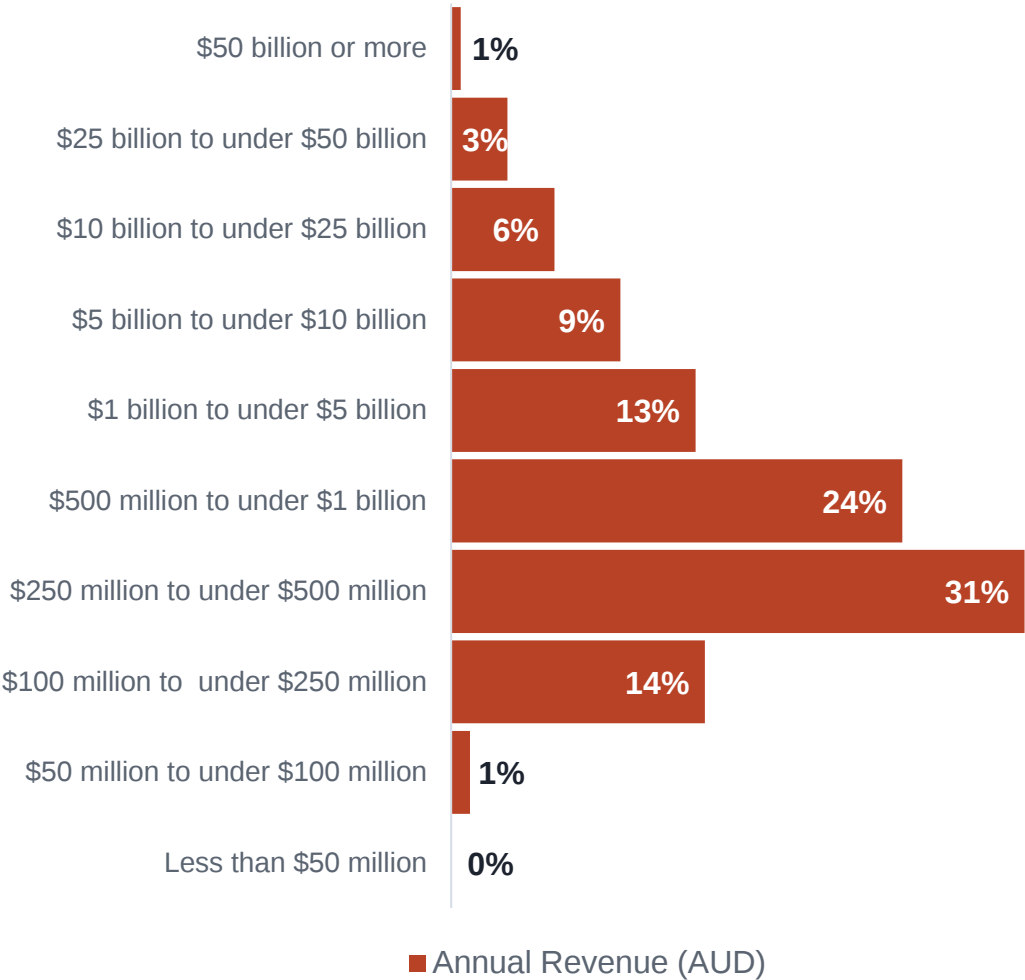


Annual Revenue of Responding Companies

Respondents represented a range of company sizes, from under \$50 million to over \$50 billion in annual revenue.

Companies with revenue between \$250 million and \$500 million were the most common respondents.

Four percent of respondents reported company revenues of more than \$25 billion.

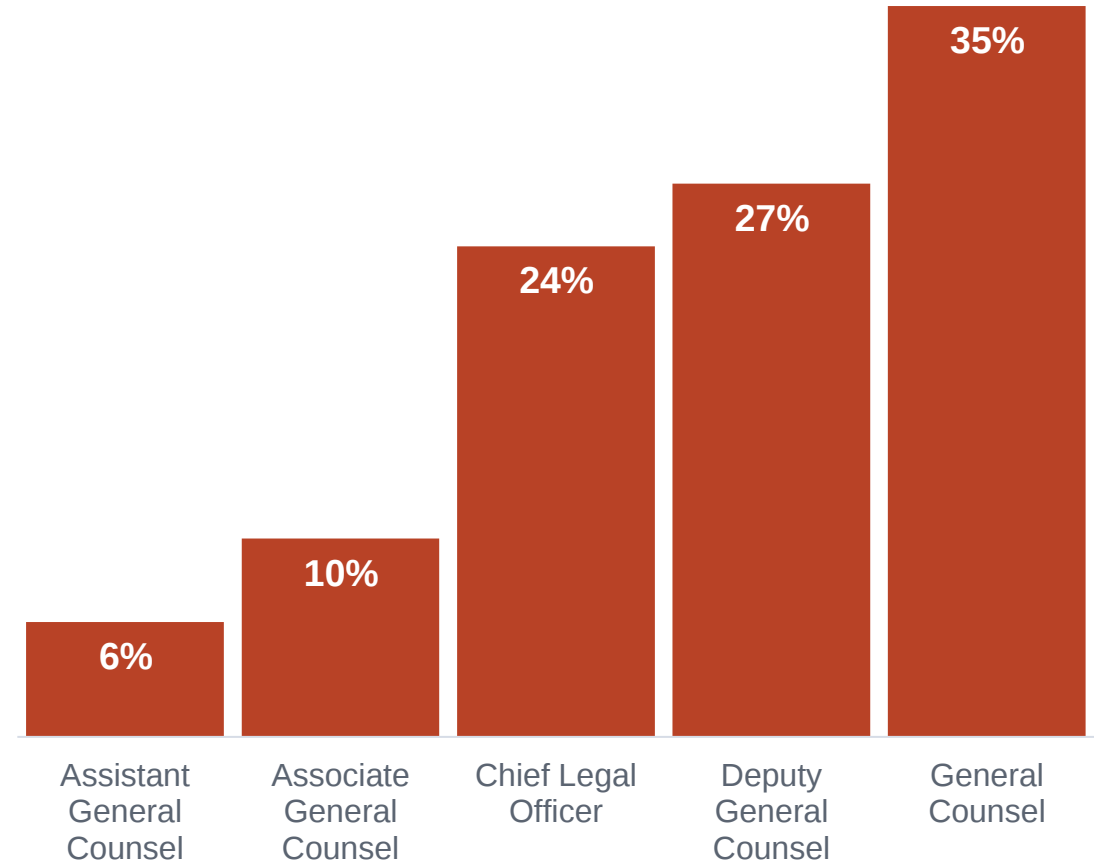


Professional Title of Respondents

All respondents held senior legal leadership roles within their organisations.

86% of respondents were CLOs, GCs, or DCs within their organisations.

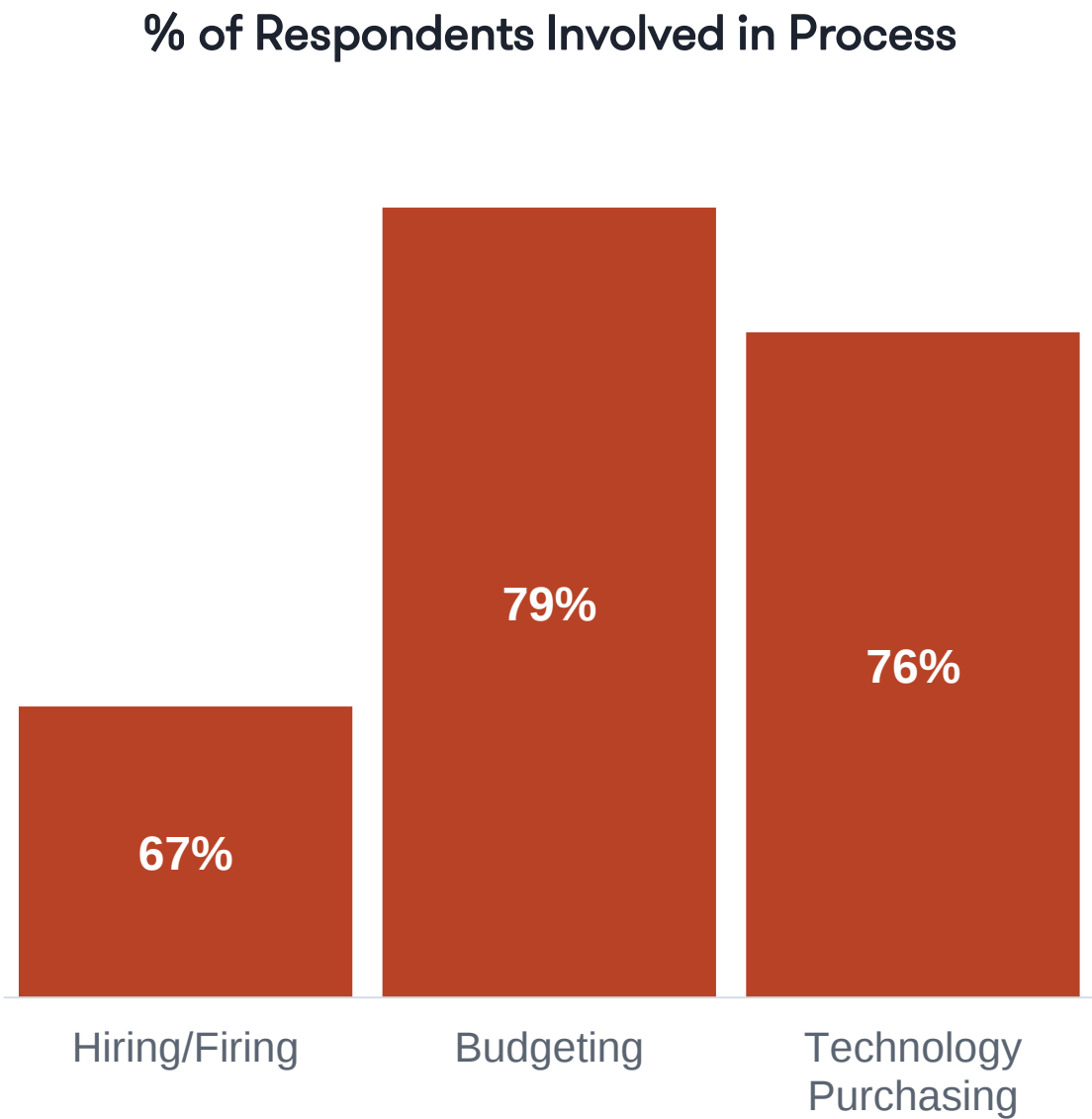
Professional Title of Respondents



Decision-making Authority of Respondents

All respondents held decision-making authority over at least one critical department function.

Nearly 80% held decision-making authority over budgeting for their department, and two-thirds reported authority over technology purchases.



Some Conclusions

Investment in legal talent—FTEs, law firms, ALSPs, and legal ops—is going up, regardless of a team’s digital maturity level. But for different reasons.

If there’s a consistent thread in this research, it’s this: **In-house legal team budgets are growing.** They’re reportedly increasing at 87% of digitally mature teams, 74% of the digital centre, and 67% of the digitally immature.

Despite the tech wave, **all of the teams are**

prioritizing investment in lawyer power over technology power but for different reasons.

- The **digitally mature** have the tech they need and use it. Fifty-nine percent expect greater investment in FTEs, **ALSPs**, and legal ops. Tech is to get greater investment, too, but it ranked last among the five budget items we asked about.
- At the **digital centre**, they have much of the tech but don’t use it methodically to improve productivity and efficiency.

Some Conclusions

Fifty-six to 61% of respondents said they're allocating more for FTEs, law firms, and **ALSPs**. Among the five investment areas we asked about, tech investment will reportedly see the slowest growth.

- **Digitally immature** organizations appear to be more conservative or traditional operationally, but they're not blind to or immune from the changes happening in the industry. **Their thirst for legal tech is growing.**
- They're going for lawyer power, people power, *and* technology power. They said they'll be directing increased funding to

hiring more FTEs (65% responding), ALSPs (57%), and buying more tech (66%).

Legal ops should see a boost, too (48%), but only 17% of digitally immature respondents said they're planning to increase law firm spending.

We hope you have enjoyed and will benefit from the research insights presented in this report. Please feel free to [contact us](#) if you have any questions or need more information.

—*The Editors*

How Axiom Can Help

90% of clients report Axiom's legal talent are as good as or better than their counterparts at traditional law firms ... yet Axiom's talent costs up to 50% less.

Axiom puts **high-quality legal talent** at your fingertips with a **one-stop shop** for secondments, recruitment solutions, specialized advice, large projects, law firm services (including fractional gcs and litigation), and our popular digital on-demand talent marketplace.

We can help you accelerate digital transformation and improve digital maturity with one of the

industry's largest benches for legal talent across 15 practice areas and 30 industries—including legal ops and AI legal specialists—at **rates up to 50% less than national law firms**.

We're helping in-house legal teams design and implement AI data governance, privacy, and compliance programs; conduct AI regulatory assessments and AI bias reviews; evaluate AI's impact on IP protection; and drive AI and other technology selection decisions, implementation, and usage.

And we can help you.

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