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Insights for Midsize Firms/THE OPTIMAL TECHNOLOGY STACK FOR MIDSIZE LAW FIRMS

The Optimal Technology Stack for Midsize Law Firms

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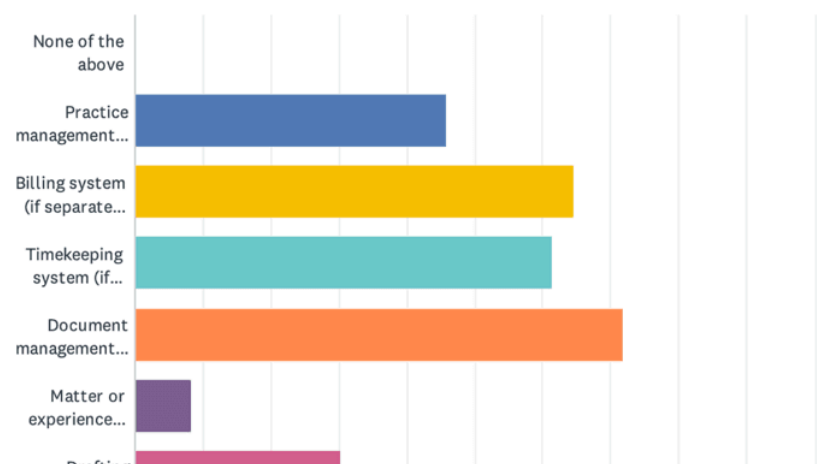
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decreasing spending, and providing actionable insights to help firms identify gaps and gain a competitive edge.

Must-Have Technology Stack for Midsize Firms

In surveys over the past year, the key areas of interest for technology investments by midsize firms were relatively consistent – with some surprising results. For example, although practice management systems would seem to be a critical investment, given their ability to streamline most critical workflows for running a law firm, they do not fall within the top three solutions in terms of interest for midsize firms. Instead, as shown in the results below (from a survey Legaltech Hub ran in collaboration with Meritas across 100 global midsize firms – the “LTH-Meritas survey”), document management, billing systems, and timekeeping are revealed as being most important.



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In the most recent “Legal Trends for Midsize Law Firms” report by Clio (“The Clio Report”), published in March 2025, the investments cited as critical are even more granular, with practice management again falling lower in popularity than expected.



Data from these surveys and other market indicators shows that there are certain key areas of investment that midsize firms should either have already made or should consider making in the near future.

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Most of the software highlighted as being critical for midsize firms is for the purpose of streamlining business and administrative practices supporting legal practice. These solutions will typically be administered by professional staff in accounting, practice or office management, HR or marketing, rather than by lawyers themselves.

Practice Management Software (PMS)

A [PMS system](#) is the backbone of a law firm's operations, often enabling matter management, time tracking, billing, and client communication. The utility of a PMS system lies in its ability to address so many of the core business needs of a firm. It's not unusual for PMS systems to also incorporate document management capabilities, for example, with some also allowing for collaborative client portal functionality to allow for easier communication and client onboarding.

A surprise from recent surveys is that PMS systems are not as widely adopted as expected, with 35.23% of respondents stating they do not use one. This may be some firms prefer to invest piecemeal in significant technology systems, for example by licensing independent time and billings systems or document management system (DMS). When firms have already made such significant technology investments, layering a full PMS system on top can cause feature overlap, causing unnecessary chaos in the tech stack. The good news is that many modern PMS systems allow for modular pricing and roll-out, so that firms can pick and choose the aspects a PMS that are missing in the rest of their tech stack and only buy into those.

Key features to look for in PMS include:

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Other attributes that are particularly important in the current landscape include mobile accessibility, ability to deploy in a modular fashion, and the integration of generative AI capabilities. In relation to the latter, many of the most popular solutions now incorporate generative AI in the form of in-app assistants, for example, allowing users to ask questions across the firm's data.

The market for PMS is fragmented, with no dominant leader emerging. Popular solutions also vary considerably from jurisdiction to jurisdiction. Common solutions currently in use include:

- [SurePoint LMS](#) (13.64% adoption)
- [ProLaw by Elite](#)
- [Expert by Aderant](#)
- [Clio Manage](#)
- [Filevine](#)
- [MyCase by Affinipay](#)
- [Smokeball](#)
- [Practice Panther](#)
- [PC Law](#)

Document Management Systems (DMS)

In the LTH-Meritas survey, [DMS software](#) emerges as the area midsize firms invest in the most, perhaps because it houses the most critical and protected data of a law firm – its work product.

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- Security and ethical wall compliance,
- Configurable workspaces and folder structures,
- Cloud-based access,
- Robust search functionality, and
- Integration with other tools like PMS and eSignature platforms.

The most advanced DMS solutions have integrated generative AI by allowing for advanced search as well as querying and auto-profiling of documents that are uploaded or saved into the system.

The most common solutions used in midlaw firms include:

- [iManage](#) (31.46%),
- [NetDocuments](#) (including [Worldox](#)) (22.47%),
- [Microsoft SharePoint](#) (13.48%).

In survey results, it's clear that while larger firms tend to prefer iManage or NetDocuments, smaller firms often rely on Microsoft SharePoint or on non-legal-specific tools like Dropbox.

Time and Billing Systems

For firms that bill by the hour (which still represents the majority of law firms, although the Clio Report indicates that more firms are moving towards flat fee billing), [timekeeping](#) and [billing/eBilling](#) systems are essential. They allow for the capturing of time for the purpose of billing, and they streamline financial

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- Narrative editing and clean-up,
- Task and phase coding,
- Client term compliance and normalization,
- Time reports and dashboard,
- Generation of bills per client from timesheets,
- Ability to handle discounts, flat fees, and automated payments.

Timekeeping solutions can sit separately to billing systems or together, further complicating this category. Our survey revealed that this is a highly fragmented market, with [SurePoint LMS](#) (15.73%) and [3E by Elite](#) (7.87%) being the most used solutions. A robust 42.70% of firms selected "other," highlighting the lack of a clear market leader.

Cloud adoption remains a key differentiator in this area, with 50.56% of firms now using cloud-based time and billing solutions, a number that is expected to grow as firms move away from on-premise software. The Clio Report also suggests that accounting software, as well as online or automatic payments tools (which can sit separately from accounting software), ranks high in popularity among midsize firms.

Given the increased amenability of midsize firms to cloud solutions, the entry of newer, AI-powered automated time capture and timekeeping solutions (such as [PointOne](#), [Laurel](#), [Ajax](#), and [Billables AI](#)) may disrupt this category in the next few years.

CRM and Client Onboarding

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Features to look for:

- Repository for client data including client contact details,
- Ability to track client interactions,
- Dashboards highlighting opportunities with clients.

CRM systems can make a significant difference for firms with a broad client base and should certainly be considered an important investment where a firm has not invested in a full PMS that allows for this kind of functionality.

Collaboration and Productivity Tools

The Clio Report highlighted the importance for midsize firms of investing in solutions that allow for [collaboration and communication](#) – both within and outside of a firm. Midsize firms are investing in software that allows for seamless virtual meetings and messaging, as well as increased productivity, often stemming from project management around cases or matters. In some instances, such as Microsoft Teams, these features sit together; in others, such as Zoom, a separate investment in a PMS or matter management solution is still necessary.

Modern instances of these solutions facilitate smooth communications with clients, allowing for shared messaging channels and file sharing. The LTH-Meritas survey found that investment in client collaboration is increasing.

This category of productivity tools is also where much generative AI innovation is occurring, which midsize firms can leverage if they license these solutions. For example, Microsoft Copilot is increasing in popularity among midsize firms that already license Microsoft products, including Teams.

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It's hardly surprising that Microsoft is the most popular provider in this area, with [Microsoft Teams](#) leading (79.55%). [Zoom](#) (77.27%) and [Cisco Webex](#) (10.23%) are also utilized, though the popularity of Webex is waning.

Legal Practice Tools

Most of the software solutions identified as critical in the midsize law firm's tech stack are focused on streamlining the business side of law, allowing for automated workflows outside of billed legal work. There are few areas, however, where point solutions focused on legal workflows are viewed as important in the midsize tech stack.

Drafting Solutions

Drafting solutions stand out as one of the point solutions that many midsize firms are most likely to invest in.

[Document automation](#) has long been a differentiator for firms with high volume, document-heavy practices. Many law firms have tried implementing document automation software but have failed in driving true adoption of it. This is because traditional document automation software typically requires a central resource to develop and then code automated templates.

Newer products, usually AI-powered, allow for an easier automated workflow around drafting, instead pushing preferred clauses and content to lawyers as they draft, recommending edits that are in line with the firm's approved precedent documents. Rather than these modern solutions, however, most midsize firms currently use narrower drafting solutions for [eSignatures](#) and

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- Clause recommendations.

Popular solutions include Thomson Reuters [Contract Express](#), [HotDocs](#) by Mitratech, and [Draftwise](#).

Features to look for in narrower solutions:

eSignature tools

- eSignatures for individual documents and suites,
- Automated send for execution,
- Tracking of executed copies.

Most midsize firms use [DocuSign](#) or [AdobeSign](#).

Proofreading tools

- Defined terms proofing,
- Conceptual spell check or inconsistency spotting (e.g. can spot mistakes in party names),
- Format checker,
- Clean-up (e.g. ability to clear document of highlighting or placeholder language).

Popular products include [Litera Check](#), and [Definely Proof](#).

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For example, where some firms might consider an investment in a platform solution such as [Relativity](#) or [DISCO](#), others with a smaller caseload or less-complex cases might find lighter touch systems sufficient, like CloudNine for review, or [EsquireTek](#) to support drafting workflows in discovery rather than review workflows.

All of these tools streamline case preparation, saving time and improving accuracy.

Features to look for:

- Easy upload of discovery data across all data types,
- Classification of data,
- Ability to review across data for relevancy,
- Tagging by theme, tagging of hot docs,
- Dashboards and data analytics.

In midsize firms, the most popular eDiscovery solutions currently in use include:

- [Relativity](#)
- [DISCO](#)
- [Logikcull by Reveal](#)
- [Reveal](#)
- [CloudNine](#)
- [Everlaw](#)

Other Technologies

There are various other investments that midsize firms should also consider. or

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It is important, however, to mention point solutions and native generative AI tools. In the Big Law market, firms have the luxury of investing in many technologies, often buying specialized products for particular practices. This is less common in the midsize market except where a firm has a key specialty area that must be catered for. Where that is the case, investment in those areas should be considered a priority as it can differentiate a firm from competitors. IP firms should therefore consider investing in innovative, robust IP management software, tax law firms should explore AI-powered tax research solutions, and so on.

As discussed throughout this article, most midsize firms are investing in generative AI through the solutions they already license for key use cases. Our market research indicates, however, that licensing of native generative [AI legal assistants](#) such as [Harvey](#) and [Spellbook](#) is on the rise in the mid-market. In the opinion of the LTH Research team, this is an area where midsize firms will be able to [derive great value](#) in the coming years. Firms that are able to explore such investments, where viable use cases exist for the technology, should certainly consider doing so.

How Midsize Firms Can Use This Information

Our tech stack for midsize firms is not a one-size-fits-all guide to technology procurement. Every firm will have different needs and given the fragmentation of the midsize market there will be differentiators between firms that will lead to varying requirements from a technology perspective. For example, a personal

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place, from vendors that are innovating and modernizing the platform allowing you to take advantage of AI where it matters. Here is an approach that you can take to evaluating your firm's tech stack, to better understand where investment should be focused.

1. Identify Gaps in Your Tech Stack

Compare your current technology stack to the list above, considering where your firm has needs that are as-yet unmet. Are there areas that are failing, or where you have for too long accepted a work-around solution, that now require modernization?

For example, if you're still relying on shared drives for document storage, it's time to invest in a DMS – especially if your firm has grown recently. If your firm initially set up Excel spreadsheets to manage invoicing and billing, now might be the time to invest in a modular practice management system that allows you to gradually roll out and build up your infrastructure.

When looking at the newer solutions in the market, ensure you're enquiring about how generative AI is being built in and whether that innovation will benefit your firm in the future.

2. Leverage Technology for Competitive Advantage

Consider the areas of your firm where technology can differentiate your key practices from competitors. These are the areas you may wish to prioritize for investment.

For example, if your firm's litigation practice is growing, adopting AI-powered legal research and case management tools can help deliver faster, more

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example, if billing inefficiencies are a major issue, start with a robust PMS or billing system.

The right technology stack can transform a midsize law firm, driving efficiency, improving client satisfaction, and providing a competitive edge. By adopting a strategic approach to technology, midsize law firms can not only keep pace with larger competitors but also carve out a niche as innovative, client-focused leaders in the legal industry.

Stay tuned for our upcoming series of articles diving deeper into each area of the tech stack, from practice management software to point solutions for specific practices. These resources will provide actionable insights to help you make the best decisions for your firm.

About the Expert

[View Profile](#)



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Nicola Shaver is the CEO and co-founder of Legaltech Hub. She has 20 years of experience in the legal industry, including ten years of practice experience with top tier firms and Fortune 500 companies and close to ...

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