How Firms Adopting AI Can Learn From CRM Rollout Mistakes

By **Paul Manuele** (September 9, 2026)

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On Aug. 25, Google Cloud introduced Gemini Enterprise for Legal, an agentic artificial intelligence platform intended to perform legal work through connections with the systems lawyers already use.

Google emphasized that it worked closely with Cleary Gottlieb Steen & Hamilton LLP, Freshfields LLP, Weil Gotshal & Manges LLP, and Williams & Connolly LLP in developing the platform.[1]

Of course, the legal market has never lacked products carrying legal pedigrees or promises of workflow fit. Take client relationship management platforms, for instance. Developed for law firms beginning in the early 1990s, these tools were intended to enable lawyers and marketing and business development professionals to collaborate in managing and developing client relationships.

InterAction, one of the industry's longest-established platforms, is still marketed as "The Legal CRM Built by Legal Professionals," and later entrants have made similar claims about their legal industry origins and fit.[2]

Nevertheless, law firms have struggled with CRM system implementation for more than 30 years. Harbor Global's 2025 Marketing Technology Survey reported CRM systems at 97% of responding firms, but active engagement by only 18.2% of lawyers.[3]

Two factors help explain this lack of engagement. First, origination-based compensation encouraged partners to guard client information rather than share it with colleagues. Second, CRM systems required administrative work outside legal practice — contacts to enter, activities to log — that competed with billable time.[4]

Marketing and business development teams were left to use the system primarily as a mailing-list tool for distributing client alerts and event invitations.

I saw that happen from within law firm marketing and business development departments, where CRM systems' adoption problem was ours to manage. The recurring mistake was judging a CRM platform by whether it could do everything a sophisticated business development function needed it to do, while assuming that lawyers would recognize its value and change their habits to incorporate it into their work.

With AI for legal work, the stakes are higher for firms. Unlike CRM platforms, if lawyers do not use it, there may be no one else at the firm who can, because its principal applications fall outside the ambit of the marketing and business development team. Google's use cases include contract review and redlining, legal research, brief drafting and citation verification, with attorneys focused on expert review and strategic refinement.[5]

Each use case depends on a lawyer at both ends. The lawyer defines the task at the outset and decides at the end whether the output is usable. Agents do more of the work in between, but they do not close the loop.

Without lawyers' participation, the platform would deliver little of the value for which the firm bought it, potentially producing a more complete adoption failure than firms experienced with CRM systems.

That said, even though the stakes are higher for AI used in legal work, the odds of adoption may be better.[6] Neither of the two aforementioned obstacles to CRM system adoption poses the same barrier for AI used in legal work. Contract review does not ask a partner to expose a client relationship or perform administrative work outside legal practice.

That favors better adoption in theory, but adoption will still depend on whether the improvement in the work justifies the effort required to guide, verify and correct the system. Firms should test that trade-off before making a firmwide commitment.

Firms probably don't have another three decades to work through potential adoption challenges surrounding AI. This article examines how firms can avoid repeating some of the mistakes of early CRM platform adoption as they evaluate whether and how to adopt AI tools — determining whether a product fits the firm's systems and workflows, designing pilot programs that work, including skeptics in pilots rather than relying only on enthusiastic early adopters, and scaling only the parts that really demonstrate value.

Move from legal-specific to firm-specific.

Google's announcement raises a practical question for anyone considering an AI platform developed with input from leading law firms: Will a platform built for the legal industry fit the way my firm operates?

Industry fit and firm fit are different questions. Many firms learned that lesson the hard way with CRM platforms. A platform could be designed for law firms, yet require infrastructure that a particular firm was not prepared to provide, including data stewards responsible for day-to-day maintenance such as deduplicating and correcting records. Even large firms that could afford dedicated data stewards did not always make them a priority. For many small and midsize firms, the additional head count was not financially realistic.

Working with leading law firms to develop AI tools can identify requirements that recur across the profession: confidentiality, matter-based permissions, ethical walls, verified authority, document-management connections and human judgment. It can also keep developers from designing a process that works on a whiteboard but not in legal practice. That can establish general capability, but it does not necessarily establish fit with a particular firm.

Firms use different systems, organize knowledge differently and apply permissions with varying consistency. Their practices also have different risk tolerances and review structures. Even within one firm, a workflow suited to high-volume contract review may be a poor fit for appellate briefing, an investigation or regulatory counseling.

Google itself acknowledged the distinction in its announcement.

"Every firm and legal department practices differently," it noted, adding that its partnerships "let organizations customize, integrate, and scale across complex enterprise architectures."[7]

Google presents that adaptability as a benefit, and it is. At the same time, the emphasis on customization and integration points to the work that may be required before the platform fits a particular firm.

Before committing, a firm should determine what changes to the platform, its systems and its workflows would be needed, what staffing and expertise would be required to support it, and whether those changes are practical.

Test under your own conditions.

In many of the CRM platform selection processes I witnessed, the demonstration became the pivotal event. By then, the firm generally knew that the product had the necessary features and that its price was within range. If the product performed well and the presenters inspired confidence, the process often shifted from deciding whether to buy it to building the internal support needed to do so, subject to technical and security approval.

Yet the demonstration showed only what the vendor could make the product do with a prepared question, selected data and an attentive audience — not how it would perform in the real world.

Buying an AI platform on the strength of a demonstration is like buying a car after a test drive in which the salesperson did the driving on a route the dealership picked. The ride feels smooth from the passenger seat. The car has sufficient range and all-wheel drive, and the garage has a 240-volt circuit, so the firm buys it.

CRM systems were supposed to be a shared vehicle for lawyers and marketing and business development professionals. In many of the selections I watched, however, the vendor was driving, and the marketing and business development team sat in the passenger seat. Meanwhile, the lawyers expected to use the system were sometimes in the back seat, and sometimes not in the car at all.

Giving lawyers access to a platform for several weeks is not much better. To extend the analogy further: The car is delivered and sits in the garage. The day before the feedback meeting, a lawyer drives it around the block and reports that it seemed fine. Spending a few minutes behind the wheel — or clicking around the platform — reveals little about what sustained use will be like.

Instead of demonstrations or temporary, ad hoc access, a genuine pilot program should test the tool on a defined job, in the environment where the work happens, by the people who will do it.

For contract review, a firm could select one agreement type, one practice group and a representative set of matters. Before introducing the tool, it should document the existing process, including the issues reviewers are expected to identify, the standards and client positions that guide their analysis, the time required, the amount of supervisory review, and the form the work takes when it moves to the next stage.

Whenever possible, it should use completed matters rather than artificial examples and preserve the complications lawyers encounter in practice, including poorly organized source documents and workflows that cross systems.

The firm can then compare the full AI-assisted process with that baseline. Did the system identify the issues the firm considers important? What did it miss? Which suggestions conflicted with the firm's judgment or the client's position? How much time did lawyers save after verification, correction and reworking? Did the output move cleanly into the next step, or did someone have to reconstruct it elsewhere?

Those questions expose trade-offs that a demonstration suppresses. A tool may accelerate an initial review while increasing supervisory work. It may perform well on agreements that closely follow a standard form and inconsistently on documents that depart substantially from it. It may produce strong analysis that lawyers cannot readily incorporate into their work. That is the information a pilot is designed to uncover.

The pilot should also reveal how much support the workflow requires. If technologists must repeatedly repair connections, knowledge professionals must curate sources and supervising lawyers must redo much of the analysis, the workflow may still be valuable, but the firm should understand and budget for the people and infrastructure required to operate it. Automation does not eliminate the need for ongoing human support.

Done this way, a pilot does what a demonstration cannot. It puts the person who will drive the car every day behind the wheel, on the firm's own roads.

Involve the skeptics.

CRM teams often relied on internal champions — people who believed in the system and wanted it to succeed — to represent the lawyer population expected to use it. That helped firms evaluate functionality, but not the habits and incentives that would determine adoption.

A May article in the American Bar Association's Law Practice magazine recommends that firms pilot new technology with representatives of each type of user, so they can identify bugs and needed customizations before broader implementation.[8] I would extend that recommendation in one respect: The group should include users with different levels of enthusiasm for the technology, including some with reputations as tough graders.

The most useful skeptics are demanding but fair. They will use the tool as intended, while pressing on where it adds risk, friction or work.

A pilot composed only of enthusiasts tests the technology under unrealistically favorable human conditions. Constructive skeptics strengthen the decision either way. They may identify problems that enthusiasts tolerate or work around. If the pilot succeeds, their participation makes the case for expansion more credible and harder to dismiss as early-adopter enthusiasm.

Scale what works.

CRM system implementation often treated firmwide rollout as the finish line. Licenses were purchased, data was migrated, training was offered and the system was declared live.

Yet rollout did not create a working habit. Lawyers still had to know when the system belonged in their workflow, receive support when it failed and experience enough value to keep using it. Too often, that harder work began only after launch and ended soon afterward.[9]

Firms can take the opposite approach with AI. They can start with a defined workflow, use a pilot to establish that it improves the work under real conditions, and then expand to similar matters, additional users or another practice with comparable requirements.

Suppose a corporate group finds that AI-assisted review of nondisclosure agreements shortens review time without increasing supervisory work. The firm could next add users who handle similar agreements, then test a related agreement type, preserving the pilot's metrics at each step. With each expansion, a designated person or team should oversee the workflow, monitor performance and respond to user feedback.

Staged expansion allows the firm to learn what works and what must change before extending the platform. It also gives the firm time to determine whether a problem lies with the technology itself or with the data, workflow, training or controls around it, and to address the cause before users become frustrated and stop using it.

Conclusion

Whatever platform a firm considers, testing it under the firm's own conditions will give legal AI a better chance to avoid the adoption problem that has plagued CRM platforms for 30 years. Firms must determine who will use it, how it will fit existing workflows and what support it will require.

Firms that prove value one workflow at a time before scaling, learn from skeptical users, and provide the staffing and ongoing support each workflow requires will be better positioned to realize AI's promise.

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[1] Google Cloud, 'Now Introducing Gemini Enterprise for Legal,' Aug.25, 2026, https://cloud.google.com/blog/products/ai-machine-learning/introducing-gemini-enterprise-for-legal; Google Cloud, 'Gemini Enterprise for Legal,' https://cloud.google.com/ai/legal; Google Cloud, 'Google Cloud Launches Gemini Enterprise for Legal,' Aug.25, 2026, https://www.googlecloudpresscorner.com/2026-08-25-Google-Cloud-Launches-Gemini-Enterprise-for-Legal.

[2] InterAction traces its origins to a major law firm. While practicing at Sidley Austin LLP in the early 1990s, Barry Solomon concluded that firms needed relationship technology designed around their particular processes. He left the firm to co-found Interface Software, the maker of InterAction. International Legal Technology Association, 'Barry Solomon - Profile,' https://www.iltanet.org/people/barry-solomon; LexisNexis InterAction, 'InterAction+: The Legal CRM Built by Legal Professionals,' https://www.lexisnexis.com/en-us/products/interaction/why-interaction-plus/built-for-legal.page. Later entrants followed similar paths. In 2012, Peppermint Technology introduced a Microsoft Dynamics CRM-based platform "built for law firms, alternative business structures and in-house legal teams," with DLA Piper-backed Riverview Law becoming its first customer and describing the relationship as a strong partnership. Legal Futures, "The Peppermint Legal Service Platform Has Arrived," March 6, 2012, https://www.legalfutures.co.uk/associate-news/the-peppermint-legal-service-platform-has-arrived/; Legal Futures, "Riverview Law Selects

Peppermint Platform," Feb.28, 2012, https://www.legalfutures.co.uk/associate-news/riverview-law-selects-peppermint-platform/. Nexl was founded in 2018 by Philipp Thurner, who had previously led innovation at Gilbert + Tobin, to develop what the company called a "fit-for-market relationship platform" for law firms. Legal Technology Hub, "Nexl CRM," https://www.legaltechnologyhub.com/vendors/nexl-crm-by-nexl/; "Nexl Raises $4m to Expand Mission of Modernizing the Business of Law," March 2023, https://nexl.cloud/resources/article-nexl-raises-4-million-to-expand-its-mission-of-changing-the-way-companies-grow/.

[3] Harbor Global, "From Enablers to Growth Drivers: Empowering Marketing & Business Development Teams to Lead Law Firm Expansion," 2025 Marketing Technology Survey, at 5, 10, https://harborglobal-prod.s3.us-east-2.amazonaws.com/files/reports/Harbor-MarTech-Survey-2025.pdf.

[4] Edward Poll, "How to Build a Successful Client Relationship Management (CRM) System," Canadian Bar Association, June 25, 2014, https://cba.org/resources/cba-practicelink/how-to-build-a-successful-client-relationship-management-crm-system/; Harbor Global, "From Enablers to Growth Drivers: Empowering Marketing & Business Development Teams to Lead Law Firm Expansion," 2025 Marketing Technology Survey, at 10, https://harborglobal-prod.s3.us-east-2.amazonaws.com/files/reports/Harbor-MarTech-Survey-2025.pdf.

[5] Google Cloud, "Google Cloud Launches Gemini Enterprise for Legal," Aug.25, 2026, https://www.googlecloudpresscorner.com/2026-08-25-Google-Cloud-Launches-Gemini-Enterprise-for-Legal; Google Cloud, "Gemini Enterprise for Legal," https://cloud.google.com/ai/legal.

[6] The adoption calculus may be different for AI tools aimed at business development, including MyMai and Kaitongo. To the extent that their value depends on lawyers' willingness to share information about their relationships or devote time to business development activities that compete with billable work, they may face some of the same adoption barriers as CRM. At the same time, as with CRM, there may be ways for marketing and business development teams to use them on lawyers' behalf. That could preserve some value if direct lawyer adoption is limited, though firms should test whether that operating model can work at sufficient scale.

[7] Google Cloud, "Gemini Enterprise for Legal," https://cloud.google.com/ai/legal.

[8] Allison C. Johs, "Improving Technology Implementation," Law Practice Magazine, May/June 2026, https://www.americanbar.org/groups/law_practice/resources/law-practice-magazine/2026/may-june-2026/improving-technology-implementation/.

[9] Harbor Global, "From Enablers to Growth Drivers: Empowering Marketing & Business Development Teams to Lead Law Firm Expansion," 2025 Marketing Technology Survey, at 13, https://harborglobal-prod.s3.us-east-2.amazonaws.com/files/reports/Harbor-MarTech-Survey-2025.pdf.