

Your information, your advantage: tips for building an effective legal knowledge management framework

AUTHORS



Kayla Goldrich



Scott Tinney

No matter the size of the legal team, a robust Legal Knowledge Management (LKM) strategy is essential in today's world to improve team performance while supporting the company's financial bottom line. At its core, LKM refers to the combination of approaches legal departments take to capture, curate, preserve and share information with their team and broader organization. While LKM is dynamic and both contingent on, and responsive to, the specific make-up of a business, it will nonetheless always include the ways in which knowledge, expertise, process, and often technology can be used to create efficiencies at an organizational level.

Effective LKM can strip away layers of human error by establishing best practices, implementing tools, and providing training and support for employees. A tailored LKM framework can radically reduce the time and effort it takes for employees to identify the "right" information. Having this information at the fingertips of employees helps ensure consistency, timeliness and polish in work product. LKM also reduces organizational risk.

From increased flow and speed of information and hybrid/remote working models to the accelerated pace of ongoing technological advancements, the modern realities of business mean it is more important than ever for in-house legal teams to get LKM right.

Below we offer some practical tips for businesses looking to implement or refresh their LKM framework.

Key LKM strategy principles

- **Your strategy should be custom-fit.** There is no "one-size-fits-all" approach to building an LKM framework. Each business has its own unique needs, resources, constraints and workflows that require careful consideration and tailored solutions. We recommend thoroughly assessing your business profile as you build your framework.
- **Take the time upfront to plan.** Communication across your business stakeholders is vital to constructing an effective LKM framework. Start by listening carefully and then take steps to create a plan that addresses organizational inefficiencies. Map out pain points, what is working (or not working), what your long-term needs are and how you can reach these goals.
- **Consider ongoing improvement part of the plan.** Continued success is contingent on consistent evaluation of systems and collaboration between legal and business teams. Your LKM framework should anticipate ongoing adjustments and include regular touchpoints for evaluation and feedback.

Best practices, tips and takeaways for building your framework

- **Identify stakeholders, owners and sponsors.** Make sure that the team responsible for your LKM framework has its core roles clearly assigned. Who is responsible for implementing a new framework? Who will be involved in maintaining it and championing it? You should also make a list of all stakeholders in the business from whom you will need ongoing input, feedback, approvals or more involved participation (e.g., different business leads, your information technology team, etc.).
- **Create a “current state” process map.** The first step in building an appropriate LKM framework is taking an accurate snapshot of your current state of affairs before seeking solutions. Consider this step as an investigation—you must gather the baseline information you need to inform changing existing systems. It may be helpful to host a meeting, townhall or form a focus group to solicit feedback from legal and business professionals. Assemble your findings into a “current-state process map” (e.g., a flowchart examining precedent collection and maintenance, and the resources and technologies used to facilitate these processes). Once you have this map, you can begin to identify where inefficiencies are occurring and why.
- **Identify and categorize your information.** Like any organizational task, an initial inventory of the information and resources you want to rely on is necessary. An effective LKM strategy will leverage both:
 - explicit, or tangible, knowledge; e.g., legal/business data, legal research, templates, and precedents; and
 - implicit/tacit knowledge; e.g., best practices, ways of working, and know-how.

Consider what information/knowledge is currently being used and by whom. Investigate opportunities for information-sharing and/or process standardization to simplify or optimize workflows.

- **Identify tools and resources.** Take stock of existing tools and resources (e.g., precedent banks, software licenses, subscriptions to periodicals, etc.) and consider how to maximize their effectiveness. For some businesses, it may mean leveraging a technology that is already being used but not to its full potential. In such cases, advanced training, unifying processes and practical workshops may form an important part of a LKM plan. Other areas of the business may be underutilizing the knowledge and data already stored in their systems. In these cases, a LKM plan should be developed to maximize the use of previous work products. Creating an accessible, well-maintained and annotated set of precedents or reference documents based on this knowledge can create meaningful efficiencies in your organization.
- **Work backwards.** Now that you have your map and understand your current state and resources, start thinking about solutions. Consider your business’ current situation, think of your end goal and work backwards from solution deployment to your initial investigation. At this stage, you will begin to identify what challenges you may face ahead of implementing a solution (i.e., timeline, budget, data risks, etc.) and how you plan to address these challenges.
- **Be pragmatic and seek utility.** Consider which projects will save the most time for the most people. A simple change to a business-wide policy (e.g., the method of tracking deals or other data) can save significant time and resources. When possible, use or build systems and technologies that speak to each other. The use of complementary systems can greatly improve efficiency and client service. For instance, using applications with two-way sync integration (i.e., where changes made in one application are automatically reflected in the other) can save time and reduce oversight.
- **Carefully vet new technology.** You may also decide it is time to introduce new systems and technologies. Take time to survey what tools are available to your business and investigate their functionality. Be cautious and practical in your approach: there are many options in the market, but newer is not always better.

- **Collaborate.** Get in front of people. Consider sitting in on other departmental meetings. Collaboration across teams is essential when building or refreshing your framework. LKM representatives should keep an open line of communication between legal, business and other departments. By collecting feedback from the individuals experiencing pain points, LKM representatives can gain a better appreciation of recurrent problems and craft more suitable solutions. It will be important to identify champions and subject matter experts at your organization to support and assist the implementation of a strong LKM system.
- **Anticipate future tweaks and improvements as a key part of your strategy.** Testing and fine-tuning should be ongoing. Make regular reviews and have frequent touchpoints with stakeholders so you can adjust systems and ensure they are optimized.

To discuss these issues, please contact the author(s).

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