State of Legal: *Six Pressures* Facing UK Law Firms in 2026

Six pressures on client onboarding, cross-sell and the single client view and what it means for firms investing in HubSpot.

EXECUTIVE SUMMARY

One structural gap. Six symptoms.

UK law firms are investing more than ever in marketing and BD technology, yet the underlying operating model has barely changed. Case management remains the system of record for fee earners and marketing, BD and client care work from something rebuilt separately, from memory, email threads and periodic exports, rather than from the same source.

The consequence is a sector-wide pattern: duplicated onboarding, unreliable contact data, missed cross-sell windows and fee earner knowledge that never reaches the people who could act on it. Firms that treat these as isolated admin issues keep firefighting them individually. Firms that recognise them as symptoms of **one structural gap, the absence of a single client record,** are the ones making progress.

PRIMARY SYSTEM OF RECORD

Case management, fee earner led

MOST EXPOSED PROCESS

Onboarding & the fee earner → BD handoff

ROOT CAUSES

People, process and technology

UNDERLYING GAP

No single, trusted client record

ABOUT THIS REPORT

The patterns in this report are grounded in roundtable conversations with practice managers, legal marketers, BD leads and firm leadership, held in partnership with Intergage Marketing Engineers and Mitto. It describes the operating model most UK law firms still run on with fee earner systems holding the definitive client record while marketing, BD and client care work from something else entirely. Two case studies show what firms have done to close that gap.

Six pressures on client data in UK law firms today.

01 Onboarding still asks the client the same question twice (at least)

New client onboarding in most firms runs through two separate processes that rarely speak to each other. Fee earners gather what they need for the matter: conflict checks, client due diligence, engagement terms. Marketing and client care then gather much of the same information again, separately, for correspondence records, communication preferences and reporting. Because case management and CRM systems are rarely connected, there is no shared intake for either side to draw on.

For a sector where trust is the product, that duplication is not a minor inefficiency. It is the first data point a prospective client has about how the firm actually operates and it arrives before any legal work has begun. A client asked the same question twice in the first week has already formed a view of how joined up the firm is, regardless of how strong the legal advice turns out to be.

THE COMPLIANCE DIMENSION

Overlapping, uncoordinated data capture at onboarding raises the risk of inconsistent records across systems. A live issue the moment that data is relied on for due diligence review or a data subject access request.

02 Revenue operations sit downstream of case management, not alongside it

Case management remains the system fee earners actually trust and everything else in the firm is built around it rather than connected to it. Marketing and BD tools are treated as secondary systems, populated separately and reconciled rarely, if ever. The practical result: no single person or team holds a genuine, current view of the client relationship.

Firms processing personal data under UK GDPR need a lawful, accurate basis for that processing and stale, unreconciled contact records make that harder to evidence. If a firm cannot trust its own contact data enough to avoid contacting someone with insensitive or irrelevant messaging, it cannot trust that data for cross-sell targeting, segmentation or panel review reporting either.

WHY IT COMPOUNDS

Every downstream process, from cross-sell to reporting, inherits whatever quality of data sits in this gap between fee earner and BD systems. This is the theme that compounds the other five.

03 Cross-sell is recognised in principle and missed in practice

Every firm can describe the cross-sell opportunity in theory. A divorce matter should prompt a conversation about updating a will; a commercial transaction should prompt one about employment, property or IP. Almost none of the firms we talk to feel they capture this consistently and the reason is structural, not a lack of awareness among fee earners.

Without a central data source connecting matter progress to a next best action, the handoff between fee earner and BD stays manual, informal and dependent on one person remembering to make an introduction. The window for a relevant cross-sell conversation is often narrow, opening around key life or business events and a disjointed, manual process means firms are structurally likely to miss it rather than occasionally unlucky.

THE COMMERCIAL COST

Cross-sell and referral work is typically far cheaper to win than new client acquisition. Missing this window consistently is a direct, recurring cost to revenue that never shows up on a P&L as a single identifiable loss.

04 Fee earner knowledge never reaches the people who need it

A significant amount of client and market context sits in fee earners' heads built through calls, meetings and years of relationship management and never makes it into any system marketing or BD can use. Most of that context is not written down anywhere, let alone somewhere searchable or reportable.

This is not a training problem. Fee earners are billed on chargeable time and asking them to spend more of it on manual data entry is both unrealistic and the wrong ask. Marketing and BD, meanwhile, need exactly that context to time cross-sell conversations well, brief campaigns accurately and build genuinely relevant case studies rather than generic ones.

WHERE THE GAP SITS

Closing it requires capture that happens as a by-product of normal fee earner activity such as call and meeting logging, rather than a new administrative task layered on top.

05 A real, well-founded fear of buying the wrong technology

Hesitation to invest in legal technology is common it is not simply resistance to change. The pace of change (from AI-assisted drafting to new matter management platforms) makes any single purchase feel like a risk of being outdated within a couple of years. That is a reasonable read of the market, not an excuse.

The more useful response is not to avoid investment but to change what is being bought. A platform approach that can absorb new capability over time through integrations and incremental configuration, carries far less obsolescence risk than a point solution built for one narrow problem and due for replacement on a fixed cycle.

THE COST OF STANDING STILL

Standing still is not a neutral choice. Every quarter without a shared client record is another quarter of onboarding duplication, missed cross-sell and unreconciled contact data compounding quietly in the background.

06 Structural change is raising the stakes

Growth increasingly comes through merger and acquisition, leaving less room for smaller boutique practices to remain viable standalone. At the same time, fewer junior solicitors are pursuing partnership, pushing more firms toward merger or acquisition as an exit route rather than a growth strategy alone.

Both trends make the single client record problem more urgent. A firm going through merger inherits multiple disconnected case management and marketing systems overnight, multiplying the onboarding and data quality issues above. And a firm training the next generation of fee earners needs them spending time on client work, not reconciling records across systems that should already talk to each other.

THE STAKES

Firms running academies and training programmes see the value clearly but those fee earners need a firm whose systems already talk to each other.

READING THE THEMES TOGETHER

Six operational niggles. *One underlying condition.*

Taken individually, these pressures look like separate problems, each with its own owner and its own fix. Taken together, they describe the absence of a single, trusted client record that fee earners, marketing and BD can all work from, symptoms of the same root cause, not six different problems requiring six different tools.

A CRM alone does not fix duplicated onboarding questions. Aligned process, clear ownership of the client record and a system built for both fee earner and BD workflows are what close the gap. **Technology makes that alignment possible. It is not a substitute for doing the alignment work.**

THE PRACTICAL ARGUMENT

Where a single system changes the picture.

Every pressure gets harder to fix the longer fee earner and BD systems stay separate and easier the moment they share one client record. That is the case for a unified CRM and operations platform sitting across both sides of the firm, rather than a marketing tool bolted onto case management as an afterthought.

01 ONBOARDING DUPLICATION

One intake feeding both matter opening and marketing or client care records.

02 FRAGMENTED SYSTEMS

Fee earners, marketing and BD work from the same contact and company record.

03 MISSED CROSS-SELL

Automated prompts triggered by matter stage changes, surfaced at the right moment.

04 LOST FEE EARNER KNOWLEDGE

Call and meeting capture that feeds the record without extra admin.

05 FEAR OF OBSOLETE TECH

A platform that extends through integrations rather than a point tool needing replacement.

06 STRUCTURAL CONSOLIDATION

One system that scales across merged entities faster than reconciling several case management databases.

None of this requires abandoning the case management systems fee earners already trust. It requires connecting them to a system built for the marketing, BD and client relationship work that case management was never designed to do.

IN PRACTICE

How other firms have approached this.

Two firms working through versions of the same challenges, at different stages of maturity, both using HubSpot as the platform.

Phillips Law

REGIONAL FIRM · COMMERCIAL & PRIVATE CLIENT · MULTIPLE PRACTICE AREAS

THE STARTING POINT

HubSpot Sales and Marketing Hub Professional were in place, but adoption was low and leadership lacked a trusted view of pipeline and performance. The issue was not missing functionality, it was a lack of clarity, alignment and ownership, with HubSpot treated as disconnected tools rather than the operating system for growth.

WHAT CHANGED

— A structured audit of the portal — contacts, companies, deals, workflows, reporting — producing a prioritised fix list

— Key contact and company properties cleaned and standardised, making basic segmentation reliable

— Role-focused training using the firm's own data, built for confidence rather than generic product tours

— A guided twelve-month roadmap sequencing clean-up, process alignment and targeted cross-sell activity

EARLY OUTCOME

A clear picture of how HubSpot is actually used, cleaner data where it matters most an agreed path toward a central, trusted system — foundations solid enough for later reporting and cross-sell work.

DWF

GLOBAL LEGAL & BUSINESS SERVICES PROVIDER

THE STARTING POINT

Data scattered across multiple systems made a unified client view difficult. The firm wanted stronger reporting for data-driven decisions and investor updates, less manual process, faster campaign delivery and firmer GDPR compliance.

WHAT CHANGED

- Legacy data migrated and cleansed so every department works from a single, reliable source
- Defined user permissions and safe test environments for refining workflows before going live
- Training and consultancy aligning sales and marketing under one system, breaking down silos
- New templates, landing pages and forms built to convert and run on automation, not manual effort
- Ongoing Super Admin support for first-line resolution and continual optimisation

OUTCOME

Unified, trustworthy data; automated workflows freeing time for higher-value work; real-time reporting for leadership. Fee earners, marketing and operations share one system with GDPR and security best practice built into how the firm works.

WHAT THIS MEANS FOR YOUR FIRM

Three honest questions, *then an audit, not a purchase.*

None of the six pressures require rebuilding your technology stack from scratch. They require an honest look at three questions:

01

Who owns the client record?

02

How much of it can be trusted today?

03

What process sits between a matter closing and the next relevant conversation?

For most firms, the practical starting point mirrors what Phillips Law did first: **an audit, not a purchase.** Understanding where data quality breaks down and where fee earner and BD systems fail to talk to each other tells you far more about what to fix than any tool selection process will. If any of these six pressures sound familiar, that is precisely the conversation this community exists to have.

CONTINUE THE CONVERSATION

Take the next step.

This report grew directly out of conversations with UK legal firms. Since then, we have created the first and only UK Legal HubSpot User Group: a peer-led community with no sales agenda attached. If you would like to be part of the next conversation or want to talk through where your own firm sits against these themes, book your place here.

Join the UK Legal HubSpot User Group →

A peer-led space for practice managers, legal marketers and BD leads to compare notes on exactly these pressures. Come along, bring a question see what other firms are actually doing about it.

Explore HubSpot for Legal →

Most HubSpot content is written for generic organisations, not firms juggling fee earner systems, conflict checks and matter-led onboarding. See the platform through a legal lens rather than a marketing one.

See our HubSpot tools & services →

If you already know where your firm's data and process gaps are, this covers how we work with firms end to end from an initial audit through to ongoing support.

AUTHORS OF THIS REPORT

Intergage Marketing Engineers

Intergage is a Diamond HubSpot Partner. We help law firms structure HubSpot as a connected commercial system, aligning matters, relationships and revenue for predictable growth. We build around matters and relationships, protect fee earner time and embed governance so it holds. We've worked with DWF, Napthens, Phillips Law, Metamorph Group, Coles Miller and Rothley Law and we founded the UK Legal HubSpot User Group.

intergage marketing engineers

HubSpot Solutions Partner Program DIAMOND