White Paper

How Your Role is Evolving in the Digital Workplace

Insights from Arken's Latest Research

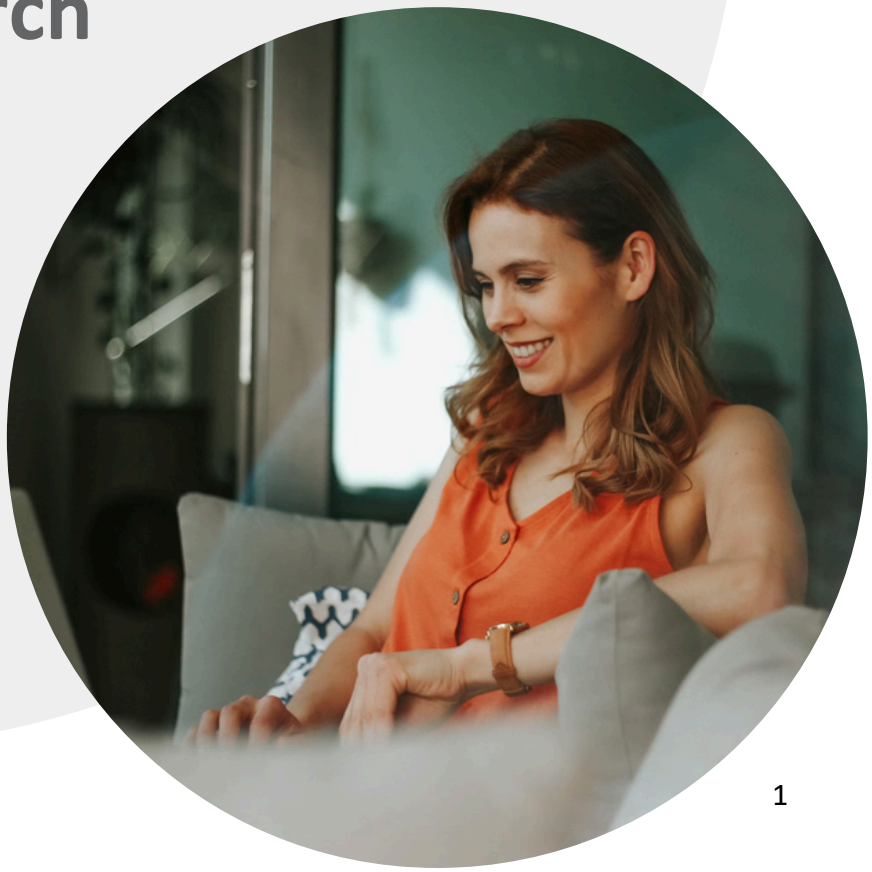


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Foreword

At Arken, we work closely with legal and estate planning professionals who are navigating rapid change, balancing increasing demands with new technologies and evolving client expectations.

This survey was designed to capture how the profession is adapting. The results show a clear message: professionals are ready to embrace digital tools, particularly AI, to reduce admin, improve efficiency, and focus more on what matters most, client relationships and expert advice.

At Arken, we're proud to support that journey. Technology shouldn't replace the human touch, it should enhance it.

Anthony Philips
CEO, Arken.legal

Executive Summary

In April 2025, Arken surveyed over 300 professionals working in legal and estate planning to understand how digital transformation, especially the rise of AI, is reshaping roles, expectations and work environments.

The results reveal a profession at a turning point. 81% of respondents said their workplace has changed since the pandemic, with hybrid working now the norm, but traditional challenges like high admin (58%) and client pressures (50%) remain.

While only 33% have adopted AI tools so far, 58% believe AI will help reduce admin and free up time for strategic or client-focused work. Importantly, just 9% think AI will significantly replace adviser roles, highlighting a belief that human expertise remains central.

This white paper explores how attitudes are shifting, where firms see the biggest opportunities for digital investment and why the future of the profession lies in striking the right balance between tech-driven efficiency and trusted personal service.



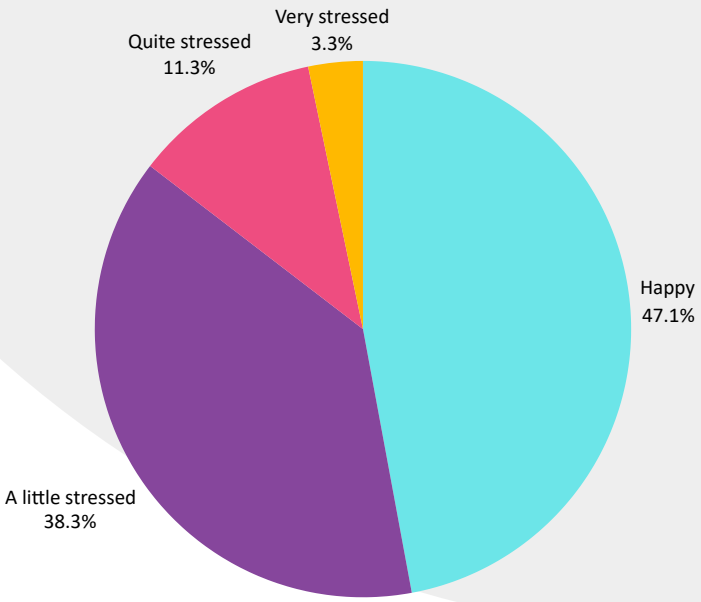
The Workplace Has Transformed But Challenges Remain

81% of respondents said the workplace has changed since the pandemic, a clear indication that hybrid and flexible working have become the norm. However, that doesn't mean work has become easier or stress-free.

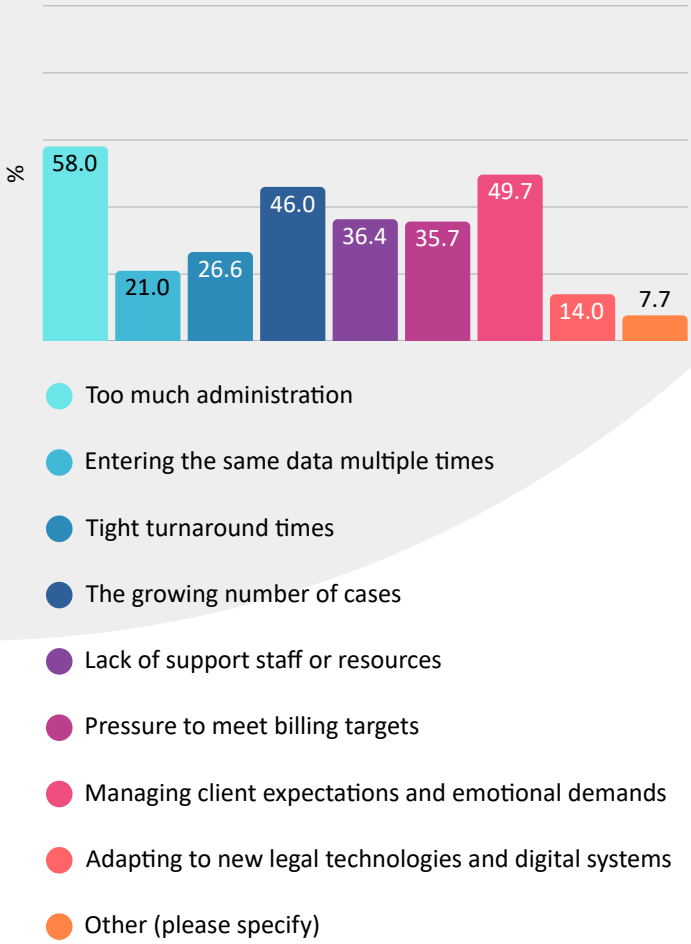
When asked how they feel at work, 47% said they feel generally happy, but over 50% reported some level of stress. The top contributors of stress were too much administration at 58%, managing client expectations at 50%, and high caseloads at 46%.

This tells us that the fundamental challenges of time pressure and manual work remain, even in more flexible settings. Professionals are eager to spend less time on admin and more time delivering meaningful advice and value to clients.

Generally, how do you feel at work?



What are the contributing factors to you feeling this way?

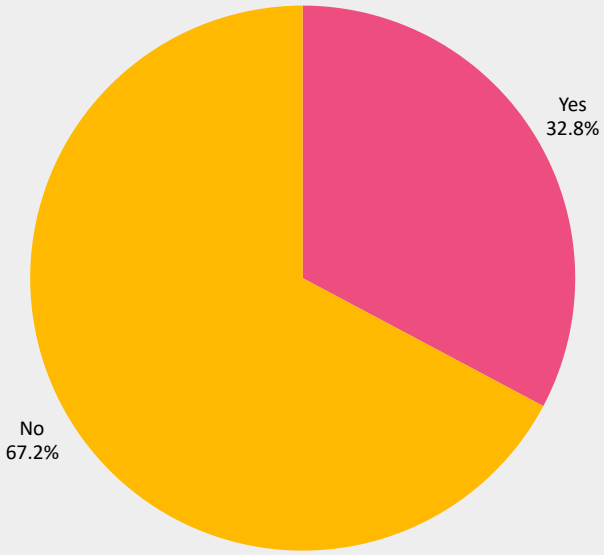


The Role of AI and Automation

Across the survey responses, one of the clearest emerging themes was cautious but growing enthusiasm for the role of AI in legal and estate planning work.

While only 33% of respondents have already adopted AI tools, 58% believe that AI will assist with administrative and research tasks, freeing up time for professionals to focus on more complex, strategic or client-focused work. This shows a strong belief in AI as an enabler, not a disruptor.

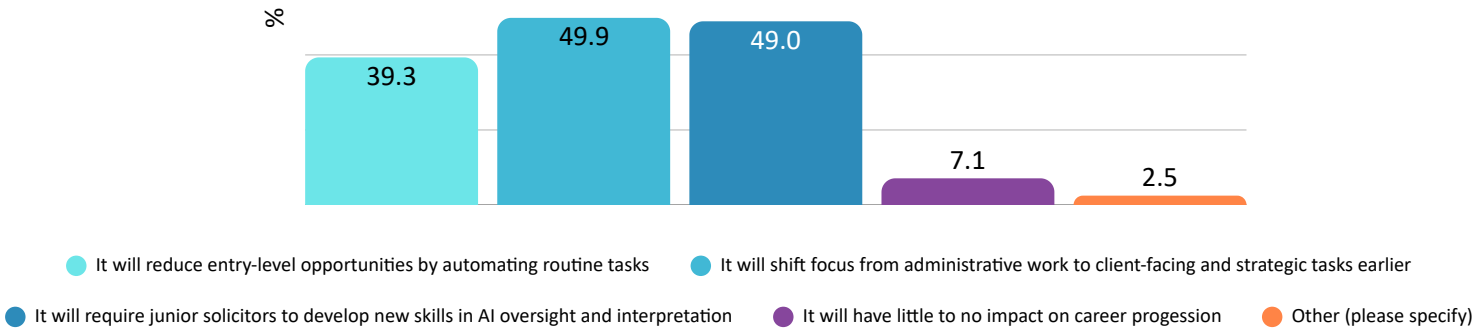
Have you or your firm already implemented any AI-powered tools in your legal work?



Professionals are also beginning to see how AI may reshape the path for junior team members. 49% believe that AI will reduce the need for junior staff to spend time on low-level drafting and admin, allowing them to focus on strategic thinking, communication and client management earlier in their careers.

There is also recognition that new skills will be needed. Another 49% believe junior roles will shift toward oversight of AI-driven outputs and managing the ethical or practical implications of automation. This reflects a broader trend across industries, where AI literacy is becoming a critical skill for early-career professionals.

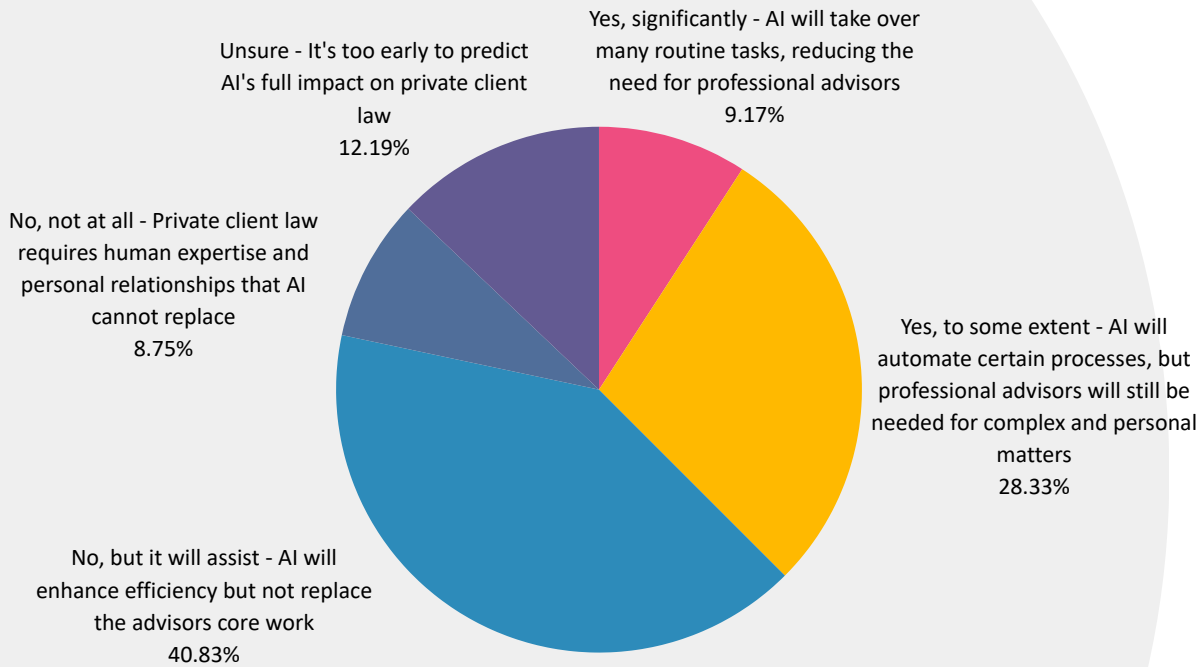
How do you think AI will impact the career development of junior solicitors in private client law?



However, concerns around AI are also evident. 28% of respondents worry that AI could reduce opportunities for entry-level roles, particularly those traditionally rooted in repetitive tasks. This signals the need for firms to consider how technology changes the structure of career development and to ensure that junior staff are still able to gain meaningful experience.

Crucially, only 9% of respondents believe AI will significantly replace professionals. This reinforces the prevailing view that AI is here to support, not replace.

Do you think AI will eventually replace some of the work currently done by professionals in estate planning matters?



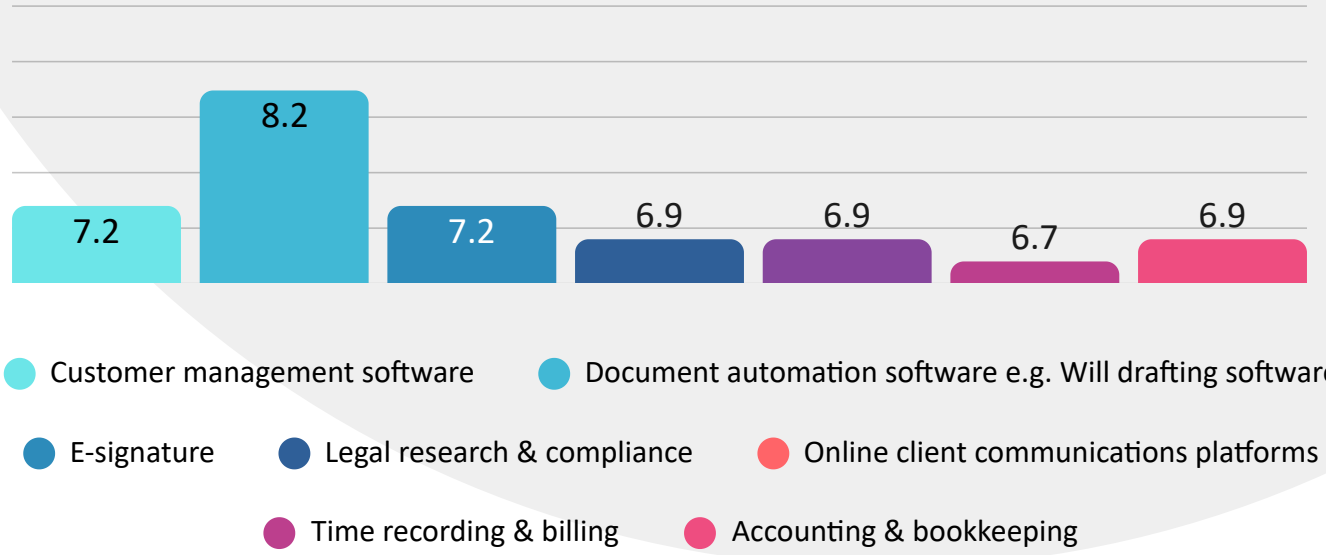
While the sector is still in the early stages of adoption, these results highlight an appetite for innovation and a growing confidence in the practical benefits of AI when applied with care and intention.

The Tools That Deliver the Most Value

We asked participants to rate the tools that have the most positive impact on their efficiency. Document automation came out on top with an average score of 8.24 out of 10. Customer management platforms and e-signatures followed closely, while AI tools and compliance software scored slightly lower, likely reflecting earlier adoption stages.

These results confirm that professionals value tools that directly reduce effort, improve accuracy and make routine tasks easier to manage.

How would you rate the following technologies based on their impact on improving efficiency in your firm?





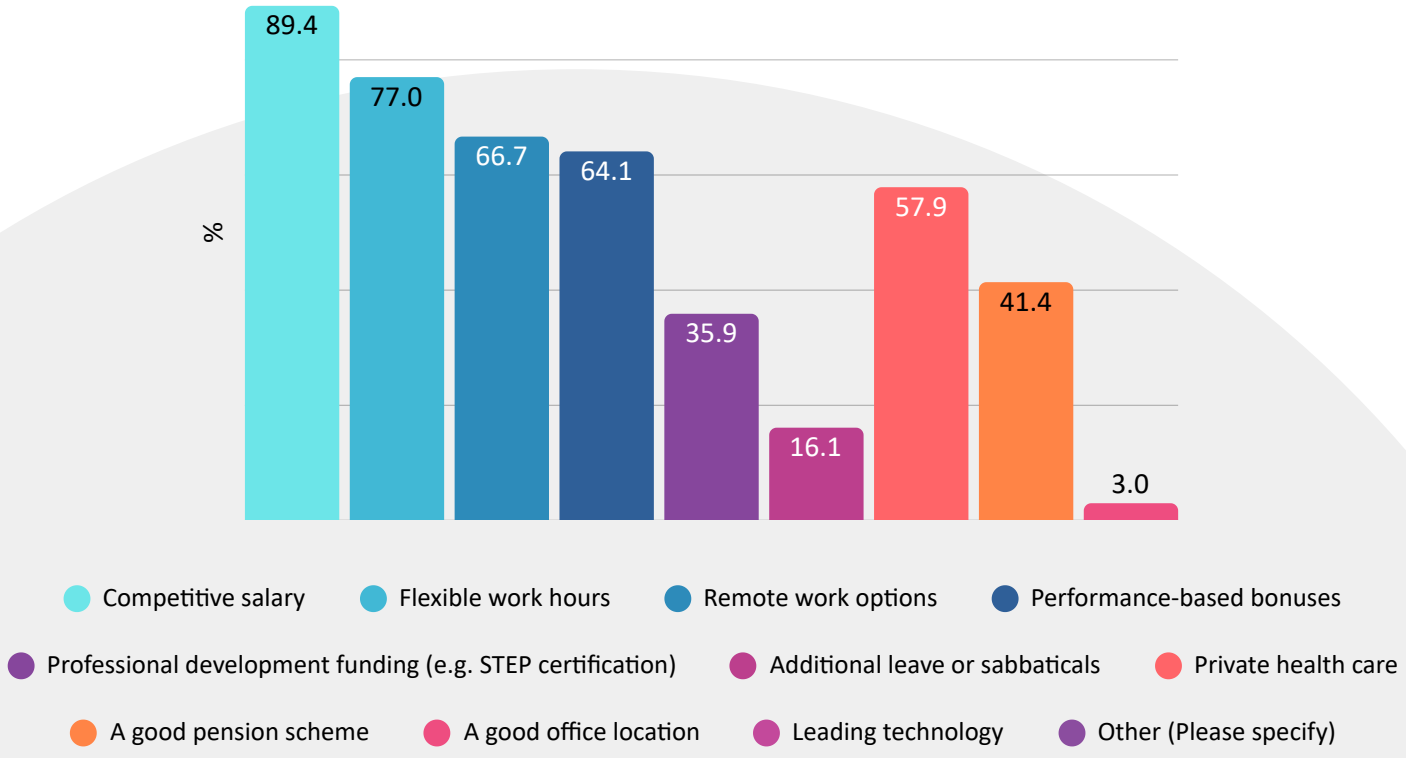
Hybrid Work Is Settled But Not Perfect

45% of respondents currently work full time in the office, yet only 14% said that is their preferred arrangement. In fact, 34% would prefer to be in the office just one or two days per week, and 12% want to work fully remotely.

Despite these preferences, 74% said they do not expect their workplace policies to change anytime soon. This points to a growing gap between employee expectations and current firm culture.

When asked about what they value in a role, salary was the top driver for 89%, but flexible hours and remote working were also chosen by 77% and 67% respectively.

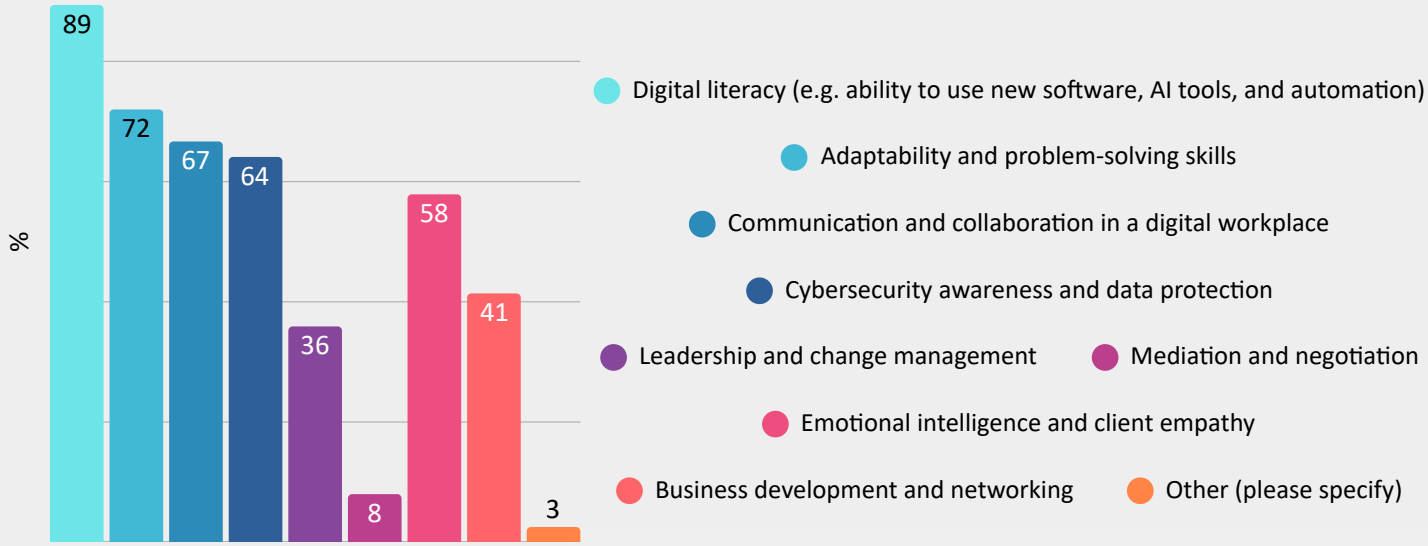
What benefits are most attractive to you when looking for a job?



The Skills That Matter Most for the Future

When asked which skills or areas of training are most important for adapting to the future of work, respondents highlighted a strong need for digital capabilities. Digital literacy was selected by 89%, suggesting it is a key area where professionals feel additional support or development is needed. This was followed by adaptability and problem-solving skills, chosen by 72%, and client communication and relationship management which 67% of respondents identified as essential.

What skills or training do you think are most important for adapting to the future of work?



These results reveal a major shift in how professionals perceive long-term success in their roles. While legal knowledge remains relevant, it was selected by only 8% of respondents as a top future skill, suggesting that technical expertise in law is now viewed as a given, rather than a differentiator.

Instead, professionals are prioritising their ability to use technology effectively, respond to change and maintain strong interpersonal relationships. As the workplace continues to digitise, those who can navigate digital tools confidently, adapt to new systems and still provide a human touch will be best positioned for success.

Firms must take note. Supporting staff through ongoing tech training, developing communication skills and creating opportunities for learning will be key to preparing teams for what comes next.

What This Means for the Industry

Legal and estate planning professionals are ready to evolve. They want better tools, more efficient processes and greater flexibility. They are not looking to replace human insight with machines but to enhance it through automation. Lawyers will still play a crucial role in providing expert advice, judgement and creating those important client relationships that require trust and empathy, but they will do so with the assistance of AI tools.

The opportunity for firms is clear. Those that invest in user-friendly, time-saving technologies will not only improve productivity but also attract and retain top talent. Technology alone won't solve all the challenges, but it will be a critical part of the solution. By embracing these changes, firms can ensure that their legal professionals remain at the forefront of the industry, driving greater value for clients while also creating a more dynamic and fulfilling workplace.

Arken's Role in Supporting the Evolving Legal Professional

At Arken, we believe in providing technology for change, efficiency and strategic planning. We work with you to build streamlined processes, reduce admin and give professionals the tools they need to serve clients with care and confidence efficiently.

This research confirms what we see every day. The profession is changing. Expectations are rising. And the firms that thrive will be the ones that blend the best of human expertise with smart, thoughtful technology.

