

FAQ – L.E.G.A.L. GenAI Survey Initiative

At a Glance

What it is: L.E.G.A.L. is a permissioned market-intelligence system built to measure how GenAI is actually changing the economics of legal service delivery. It combines (i) permissioned, client-specific sharing of a limited subset of provider responses (only where the provider authorizes release) with (ii) de-identified or aggregated benchmarking used to produce composite insights.

What it focuses on: L.E.G.A.L. focuses on GenAI's commercial impact—who does the work, how work is allocated and priced, and where legal spend is moving.

What it is not: L.E.G.A.L. is not a generic survey, an experiment roundup, or a tool inventory. It's designed to replace fragmented one-off client questionnaires with a coordinated baseline that produces comparable benchmarks.

What's in the system: The system contains three instruments, each with a distinct job:

- Client Survey (demand-side expectations)
- Provider Survey (supply-side reality)
- Case Study Canvas (optional follow-up depth where there's real signal)

Time required (current pilot estimates):

- Client Survey: ~20 minutes
- Provider Survey: ~90 minutes (largely front-loaded; updates are selective)

Who should complete it: Submit one organization-level response per survey (often collaboratively), representing the organization's integrated assumptions and choices—not individual opinions.

How clients participate: Clients (a) complete the Client Survey and/or (b) request Provider Survey responses from their law firms and ALSPs. Doing both is recommended but not required.

How law firms/ALSPs participate: Providers complete the Provider Survey in response to a client request or voluntarily to establish a baseline; responses persist and are prepopulated for future requests.

How sharing works: Nothing is shared automatically. Only Provider Survey Questions 1–5 may be shared with a Requesting Client—and only with the provider's explicit, client-specific approval. All other Provider Survey responses (Questions 6–16) and all Client Survey responses are used only in de-identified and/or aggregated benchmarking (subject to minimum thresholds).

What you get back: All participants receive a composite market report—modular, based on participation level. Clients also receive provider responses to core questions (Questions 1–5) as if they had administered the survey themselves, as well as peer and provider benchmarking outputs that scale with provider response volume.

Cost: Participation is free for both clients and providers (the business model is built on aggregate insights, not selling individual responses).

Basics

1. What is the L.E.G.A.L. GenAI Survey Initiative?

Driven by a collaborative effort of leading law departments, the L.E.G.A.L. (Leaders Exploring Generative AI in Law) GenAI Survey Initiative is a permissioned market-intelligence system designed to measure how GenAI is actually changing the economics of legal service delivery.

Rather than collecting opinions, experiments, or technology inventories, L.E.G.A.L. focuses on commercial impact—how GenAI is affecting:

- Who does the work
- How work is allocated and priced
- Where legal spend is moving

L.E.G.A.L. replaces fragmented, duplicative client surveys with a single, coordinated framework, using mirrored surveys of clients and providers to surface expectation gaps and produce decision-grade benchmarks that no individual participant could generate alone.

In short, L.E.G.A.L. is not a generic market survey. It is shared infrastructure for honest, comparable insight about GenAI's real impact on the legal market.

2. Why is this effort necessary when there are already so many GenAI surveys?

Most client-initiated GenAI surveys are individually rational—and collectively inefficient.

Law departments send bespoke questionnaires to their providers to understand what is real. Providers respond—repeatedly—to overlapping, slightly different questions. The result is predictable: high burden, inconsistent answers, survey fatigue, and very little reusable intelligence.

L.E.G.A.L. exists to replace that fragmentation with coordination.

Instead of each client running its own survey, L.E.G.A.L. provides a shared, consensus-based instrument that providers can answer once, and then reuse, to produce market-wide benchmarks that no bilateral survey can deliver.

Equally important, L.E.G.A.L. surveys both sides of the market. By pairing mirrored Client Survey and Provider Survey instruments, the initiative makes expectation gaps visible—revealing where clients' assumptions about GenAI diverge from providers' actual capabilities and economics.

In short, L.E.G.A.L. does not add another survey to the pile. It is a collaborative effort to provide a coordinated replacement for existing, individual client surveys—to reduce burden while materially improving signal for everyone.

3. What is covered in the Client Survey, the Provider Survey, and the Case Study Canvas, respectively?

L.E.G.A.L. uses three complementary instruments, each designed for a distinct role in the intelligence system.

The [Client Survey](#) captures the demand-side perspective—how law departments are approaching GenAI from a commercial and sourcing standpoint. It focuses on expectations about how GenAI will affect workflows, staffing, pricing, and legal spend, as well as how those expectations are shaping current decisions. The Client Survey is fully structured and contains no required narrative responses, to minimize burden and maximize comparability.

The [Provider Survey](#) captures the supply-side reality—how law firms and other providers are actually deploying GenAI in ways that affect service delivery economics. It covers adoption, governance, and use cases, with particular emphasis on assumptions about efficiency, pricing, margins, and client demand. A defined subset of responses (Provider Survey Questions 1–5) may be shared directly with specific Requesting Clients at the provider’s discretion to replace individual client surveys. The remaining responses (Provider Survey Questions 6–16) are not disclosed to anyone, including clients, in an identifiable (firm-attributable) form. They are used only in de-identified and/or aggregated benchmarking outputs—specifically (i) client-specific benchmark reports provided to Requesting Clients (subject to minimum thresholds) and (ii) the composite market report shared with participants.

The [Case Study Canvas](#) is a selective follow-up tool, not a general survey. It allows clients and providers to go deeper on specific GenAI use cases where there is real signal—without turning the core surveys into a narrative exercise. This is where workflow detail, safeguards, and measurable outcomes are documented, by permission, on a case-by-case basis.

Together, the three instruments balance breadth, comparability, and depth:

- Structured surveys for benchmarking at scale
- Targeted case studies only where additional detail is commercially meaningful

4. What is not covered in the Client Survey, the Provider Survey, and the Case Study Canvas?

L.E.G.A.L. is intentionally scoped. Its organizing principle is commercial impact—how GenAI changes who does what, how work is allocated and priced, and where legal spend moves.

That focus means we do not attempt to capture everything that is interesting about GenAI. In particular, L.E.G.A.L. is not designed to be:

- A comprehensive inventory of tools, pilots, or internal experiments
- A policy or compliance repository
- A deep dive into GenAI issues outside legal service delivery economics

Many topics critically important to clients and providers are outside L.E.G.A.L.’s scope of purpose. For example:

- Substantive legal advice on enterprise GenAI (products, services, operations)

- Deep data security questionnaires that require cross-functional alignment well beyond clients' law departments

Excluding genuinely important topics is not a value judgment. It is a disciplined choice: better signal with less burden.

5. What are L.E.G.A.L. case studies?

L.E.G.A.L. case studies are optional, opt-in follow-ups designed to go deeper where survey results indicate real signal.

They are not required for participation and are not part of the core benchmarking instruments. Instead, case studies provide a structured way to explore specific GenAI use cases in more detail—such as workflow design, safeguards, and measurable commercial outcomes—when doing so would be informative.

Key characteristics include:

- **Explicit consent required.** Case studies are developed only with affirmative permissions from participating organizations.
- **Purpose-built depth.** They capture nuance and context that would be inappropriate to require—or standardize—across the full survey population.
- **Controlled use.** Case study insights may inform composite findings and, where permission is granted, be referenced in reports, briefings, or events. No attribution occurs without express approval.

The intent is to preserve discipline in the core surveys—keeping them structured, comparable, and low-burden—while still allowing deeper exploration where it is commercially meaningful.

In short: Benchmark broadly, then go deep selectively—by choice, not by default.

6. If it is free, how does L.E.G.A.L. make money?

L.E.G.A.L. is free to participants:

- Free to clients that complete the Client Survey and/or request Provider Survey responses
- Free to providers that complete the Provider Survey, including access to composite benchmarking outputs

But L.E.G.A.L. is not charity—though that would be ironic for an initiative that centers on commercial impact. L.E.G.A.L. is a commercial undertaking operated by LexFusion Intelligence (Baretz+Brunelle) to build a decision-grade view of how GenAI is actually affecting legal service delivery economics.

L.E.G.A.L. generates value—and supports monetization—through aggregate insights, not individual responses, specifically:

- Building the industry's most robust dataset on GenAI's commercial impact in legal
- Using de-identified, composite findings as the foundation for briefings, events, research, and advisory work (including capital advisory and market strategy)

What does *not* happen:

- We do not sell individual participant responses.
- We do not provide third parties with access to identifiable, organization-level data.

In short: Participation is free because the business model is built on permissioned, de-identified market intelligence at scale, not on charging participants or commercializing their individual answers.

Participation

7. How long does the survey take?

Data thus far puts the timing as follows:

- Client Survey: approximately 20 minutes
- Provider Survey: approximately 90 minutes

These estimates will be refined as the dataset grows.

The time commitment is not driven by narrative writing. There is only one required narrative question across both surveys. Most of the time is spent on structured questions that require explicit *thinking*—particularly about GenAI’s commercial impact and the attendant operating assumptions that inform decisions being made today.

For many organizations, L.E.G.A.L. will be the first time those assumptions are articulated clearly. That work is valuable—but it is not trivial.

The effort required, however, is largely front-loaded:

- Responses persist and are prepopulated for future requests.
- Updates are needed only when facts or assumptions change.
- Subsequent interactions therefore require materially less time.

Importantly, L.E.G.A.L. reduces—rather than adds to—existing survey burden. Many one-off, client-authored GenAI surveys are narrative-heavy and, on their own, take longer than L.E.G.A.L. The aggregate time savings should prove substantial.

Participating Providers can further compound these time savings by redirecting clients that send bespoke GenAI surveys to utilize L.E.G.A.L. instead. This allows providers to release existing responses if they so choose, rather than repeatedly completing new questionnaires, while still meeting clients’ information needs.

In short: L.E.G.A.L. requires real thinking once, then dramatically reduces repeat effort—producing better signal with less cumulative time investment.

8. Who should complete the survey?

Each survey is intended to be completed at the organization level, not by an individual acting solely in a personal capacity.

Accordingly, responses should be owned by stakeholders who are trusted to accurately convey the organization's GenAI strategy and operating assumptions—including how GenAI is expected to affect workflows, staffing, pricing, and economics over time.

In many organizations, completing the survey is a collaborative effort, drawing on input from leadership, innovation, operations, pricing, or knowledge teams. L.E.G.A.L. supports multiple contributors, but the final submission represents one consolidated, firm-wide or department-wide view.

The goal is not to capture every internal opinion but to reflect the integrated set of choices the organization is actually making—or is prepared to make—as GenAI adoption evolves.

9. Is there a way to save in-progress responses? Can multiple people collaborate on one response?

Yes and yes.

As explained below in greater detail, submitting saves in-progress responses. Submission alone does not release responses. Submission is required in order to enable collaboration.

Collaboration is both supported and encouraged. L.E.G.A.L. is designed to capture a unified, organization-level view, and many of the questions might benefit from input from more than one stakeholder.

While online collaboration is enabled, most collaboration will occur offline. All L.E.G.A.L. materials, including the annotated survey instruments, are available on the [L.E.G.A.L. website](#) for review or download, in both human- and machine-readable format.

Submitting vs Releasing Responses. At the bottom of each survey instrument, there is a single action button—*Submit*—which serves two purposes:

- It saves responses to the system.
- It makes the most recent version available to optional collaborators.

Submitting the survey saves your current responses to the system and enables collaboration. Submission alone does *not* release responses.

Release requires an independent authorization step—a separate Acknowledgment checkbox at the end of the survey. Release therefore depends on two conditions:

- Submitted survey responses
- Release authorization

Responses are released only if both conditions are met. For the Provider Survey, this means authorized client-facing responses are transmitted to the client at the close of the response period only if the client-specific release authorization is active.

Key points to note:

- You may submit and update the survey *without* authorizing release.
- Authorization may be withdrawn at any time, prospectively.

- In the case of the Provider Survey, authorization is client specific (i.e., granted on a client-by-client basis) and must be active when the response period closes in order for responses to be transmitted.

In short, submission controls saving and collaboration, whereas release authorization controls visibility.

Primary Point of Contact. The Primary Point of Contact serves as the organization's designated representative responsible for L.E.G.A.L. administration and communication.

Until the Primary Point of Contact is designated, the system defaults to the first email address to register for L.E.G.A.L.. The Primary Point of Contact may be designated, or changed, at any time at the top of the survey instrument. But there is only one Primary Point of Contact at any given time—for providers, it is not set per Requesting Client and does not change per submission. Thus, while organizations may designate any individual, we recommend using a group inbox, where feasible, for the Primary Point of Contact to ensure continuity.

Indeed, to avoid duplicate effort and keep one organization-level response, once an organization's L.E.G.A.L. profile exists, we route subsequent registrations from the same organization to the established Primary Point of Contact to connect colleagues internally and coordinate participation—e.g., by adding collaborators.

Optional Collaborators. Along with the Primary Point of Contact, organizations may list additional collaborators by providing their email addresses in a separate field at the top of each survey instrument. Collaborators are granted access to contribute to the organization's unified survey response. In the case of the Provider Survey, collaborators are client-specific—i.e., different collaborators are added to the form associated with a specific client and, unlike responses and the Primary Point of Contact, are not shared between forms.

While the system supports multiple contributors, it does *not* support simultaneous co-authoring—that is, per the above, responses must be submitted to be saved and made available to collaborators. Think of this like a document management system: Submitting the survey is equivalent to checking the document back in so others can work from the current version.

Thus, at any given time, only one person should be editing the survey. Other collaborators can continue work only after the current editor submits. This design preserves version integrity and prevents conflicting edits.

10. Do we need to submit more than one response? Can we?

No. L.E.G.A.L. accepts one unified set of responses per organization. However, responses are persistent and organizations can selectively update their responses over time.

The initiative is designed to operate at the organizational level, not the individual level. While organizations naturally contain differing views, L.E.G.A.L. is intended to capture the integrated position reflected in the organization's strategy and operating choices, not a collection of individual opinions.

Internal debate and collaboration are encouraged as part of arriving at consensus. But the final submission represents the organization's consolidated view at a specific point in time. Maintaining one official set of responses per organization is essential for comparability, benchmarking integrity, and longitudinal analysis—and for keeping L.E.G.A.L. decision-grade rather than anecdotal.

A potential supplementary use. Separately—and explicitly outside the current core L.E.G.A.L. benchmarking system—we are exploring a pared-down internal version of the commercial-assumptions portion of the survey. This would enable organizations to run an internal diagnostic to understand the distribution of beliefs within their own teams about GenAI’s direction and speed of impact. Any such use would be optional, separate, and thoroughly explained when offered—to the point of likely having its own FAQ.

For Clients

11. How does L.E.G.A.L. benefit clients?

L.E.G.A.L. gives clients better intelligence with materially lower effort—at no cost.

Lower burden. L.E.G.A.L. operates the Provider Survey on clients’ behalf, enabling clients to receive their providers’ client-facing responses as if they had run the survey themselves—without the administrative overhead.

Stronger provider benchmarking. Clients receive benchmarked reporting that contextualizes their providers against a broader, market-wide data set that no single client could assemble independently—with client-specific panel views and richer diagnostics (e.g., distributions) delivered if minimum provider-response thresholds are met.

Peer law department insight. Through the Client Survey, participating organizations gain visibility (de-identified) into how peer law departments are approaching GenAI—another perspective that is otherwise inaccessible.

Clearer diagnosis of misalignment. As a neutral third party, L.E.G.A.L. can ask providers questions that clients would not receive candid answers to directly. When paired with mirrored Client Survey responses, this de-identified data helps surface the root causes of client–provider misalignment, rather than just its symptoms.

A shared point of reference. By grounding conversations in robust benchmarks made available to all participants, L.E.G.A.L. improves the quality of internal discussions and external provider dialogue—shifting conversations from anecdote and assertion to evidence.

12. How do clients participate in L.E.G.A.L.?

Clients participate in L.E.G.A.L. in two complementary ways.

First, clients complete the Client Survey, which captures their own expectations and assumptions about GenAI’s commercial impact. This enables benchmarking against peer law departments and provides essential context for interpreting provider responses. Outside of the client’s own internal use—i.e., comparing their answers to those of their peers and providers—Client Survey responses are used solely as de-identified/aggregated Benchmarking Data. Clients can register for the Client Survey on the [L.E.G.A.L. homepage](#).

Second, clients request that their law firms and other legal service providers complete the Provider Survey. When a provider completes the survey, the client-facing portions of that provider’s responses are shared with the Requesting Client as if the client had conducted the survey themselves, along with robust benchmarking that utilizes the de-identified responses and the global data set. This is a double opt-in process: Clients request responses, and providers decide whether to release them. Clients can register to send the Provider Survey to their law firms and ALSPs on the [L.E.G.A.L. homepage](#).

Together, these two steps allow clients to see:

- How their own operations assumptions compare to peers
- How their providers compare with one another and the broader market
- Where, and how, their perspective differs from their providers (de-identified to enable candor)

What clients receive depends on how they participate (Client Survey only, provider requests only, or both). See the next question for the specific deliverables and the thresholds that unlock panel-level benchmarking and richer diagnostics.

13. Do clients need to take the Client Survey to request responses to the Provider Survey from their providers, and vice versa?

No. Clients may choose to do either, or both—but both is strongly recommended.

A client can:

- Only complete the Client Survey
- Only request Provider Survey responses from their providers
- Do both

Each instrument is valuable on its own:

- The Client Survey benchmarks your assumptions and decision posture against peer law departments.
- The Provider Survey benchmarks your providers against the broader market.
- But together, the mirrored instruments help pinpoint where misalignment originates—client expectations, provider realities, or both—so you can focus action where it will change outcomes (work allocation, pricing, controls, and spend).

What you receive depends on how you participate.

Complete the Client Survey only → peer composite benchmark report: You receive the de-identified, program-wide composite law department benchmarking shared with all participants. This lets you compare your own responses with the global results, internally.

Request Provider Survey responses only → provider responses and Benchmarks (where minimum thresholds met):

- Where you request Provider Survey responses and they authorize release to you (double opt-in), you receive providers' raw responses to Provider Survey Questions 1–5 just as if you had administered the survey yourself.
- Where you meet a minimum threshold of *five* providers releasing responses to you, you also receive:
 - Individual provider responses to Provider Survey Questions 2–4 benchmarked against both your provider panel's composite responses and the global provider data set
 - Your provider panel's composite responses to Provider Survey Questions 6–16 benchmarked against the global provider data set
- Where you meet a minimum threshold of *20* providers releasing responses to you, you also receive:

- Individual provider responses to Provider Survey Questions 2–4 benchmarked against your provider panel’s *segmented* responses and the *segmented* global provider data set
- De-identified dot visualizations showing your provider panel’s responses to Questions 6–16 benchmarked against the global provider data set

Do both (Client Survey + provider requests) → full client benchmarking (demand-side + supply-side), with richer diagnostics—you’ll receive all the above, plus:

- Your responses benchmarked against the segmented global client data set and the global provider data set.
- Where you meet a minimum threshold of *five* providers releasing responses to you, you also receive your provider panel’s responses benchmarked against your responses, the segmented global client data set, and the global provider data set.
- Where you meet a minimum threshold of *20* providers releasing responses to you, you also receive your provider panel’s de-identified dot visualizations benchmarked against your responses, the segmented global client data set, and the global provider data set.

14. Do clients have to request responses from all their providers?

No. Clients have full discretion over which providers they include and how. Clients register to send the Provider Survey to their law firms and ALSPs on the [L.E.G.A.L. homepage](#) and then choose which providers to include. That said, peer law departments have already seeded the system with hundreds of requests. Thus, in practice, many requests to respond are automatically converted into release authorization requests—i.e., *Please authorize L.E.G.A.L. to send us the responses you’ve already completed and released to other clients.*

15. How do client requests to providers work in practice?

After clients register to send Provider Survey requests to their law firms and ALSPs on the [L.E.G.A.L. homepage](#), we supply clients with ready-to-send outreach language containing a unique survey registration link that allows providers to register themselves. Upon registration, we take over administration, including follow-ups. If the provider already has a response on file, the registration process will surface this and convert a direct request (please complete the survey) into a release authorization requests (please release your existing responses). Peer law departments have already seeded the system with hundreds of requests. Thus, many direct requests are automatically converted into release authorization requests.

16. Can clients ask their own questions? How does L.E.G.A.L. affect RFIs?

L.E.G.A.L. is a supplement, not a constraint. We expect clients to have, and ask, additional questions.

L.E.G.A.L. is a better way to collect, share, and benchmark the questions everyone is asking—not try to capture every question anyone is asking. The client-facing portion of the Provider Survey covers the common, core questions that providers are routinely asked across clients. As evinced in the many client-authored surveys we collected when creating L.E.G.A.L., these questions are being repeatedly answered in slightly different narrative forms. Providers answer these questions once in L.E.G.A.L. and update them only when facts or assumptions change.

This does not eliminate all RFIs; it allows RFIs to be narrower and more targeted. Rather than re-asking baseline questions, clients can focus RFIs on their specific requirements, risks, or use cases.

In practice:

- L.E.G.A.L. handles the shared baseline.
- RFIs handle what is truly bespoke.

The result is less burden for providers, better signal for clients, and cleaner separation between benchmarking and unique client needs.

Indeed, L.E.G.A.L. itself is premised on targeted follow-up. Not every common question is contained in the highly structured Provider Survey. Rather, the more narrative-heavy Case Study Canvas is the instrument designed for deeper dives. Instead of asking every question to every firm, we encourage clients to be selective in determining not only which providers but which specific use cases merit the effort required on both sides to engage constructively on the details of integrating GenAI into legal service delivery.

For Providers

17. How does L.E.G.A.L. benefit providers?

Just as clients get better intelligence with less effort, providers get fewer surveys, more control, and better insight without giving up confidentiality or negotiating leverage—at no cost.

Lower burden. Providers answer the core GenAI questions once, not separately for every client. Responses persist and are prepopulated for future requests, allowing providers to update only when facts or assumptions change rather than starting from scratch each time.

Client-by-client control. Disclosure of client-facing responses is never automatic. Providers decide, on a client-by-client basis, whether and when to release their responses. This preserves normal bilateral control while eliminating duplicative effort.

Peer and client benchmarking. Participation entitles providers to composite benchmarking insights, calibrated by participation level, showing how peers are approaching GenAI's commercial impact and how client expectations are evolving—intelligence providers do not receive with one-off, client-mandated surveys.

A safe space for candor. As a neutral third party, L.E.G.A.L. can ask questions providers could not answer candidly if clients saw the responses. These perspectives—presented only in de-identified form—allow providers to avoid commercial risk but still surface valid concerns about pricing pressure, mixed messages, and unrealistic expectations.

A shared point of reference. With both client and provider data in the system, L.E.G.A.L. creates a common factual baseline that improves the quality of conversations, both with clients and for internal strategic decision-making.

18. How do law firms and ALSPs participate in L.E.G.A.L.?

Law firms and ALSPs participate in L.E.G.A.L. by completing the Provider Survey.

Providers may complete the Provider Survey in response to a client request. This is the most common entry point and allows providers to respond once to a standardized set of questions that multiple clients can reuse—subject to the provider's client-specific authorization decisions.

Or providers may participate voluntarily, even absent a specific client request. Voluntary participation allows providers to establish a baseline and gain access to composite benchmarking insights.

In all cases:

- Providers submit one firm-wide response, not client-specific versions.
- Responses persist and are prepopulated for future requests, with updates made selectively only when facts or assumptions change.
- Client-facing sharing is entirely permission-based on an individual, client-by-client basis.

Participation is designed to minimize effort while maximizing reuse, control, and insight—both immediately and over time.

Once a provider participates in L.E.G.A.L., it is in their interest to encourage clients that send bespoke GenAI surveys to use L.E.G.A.L. instead. This allows the provider to release existing responses, if they so choose, rather than completing yet another one-off questionnaire, while still meeting the client's information needs.

19. Why would a provider participate voluntarily—i.e., absent a client request?

Voluntary participation is primarily about benchmarking and preparedness.

Benchmarking access. Participation is the mechanism by which providers receive the L.E.G.A.L. composite benchmarking report—calibrated to level of participation—including insight into peer behavior and evolving client expectations.

Establish a baseline before the first request. Completing the Provider Survey in advance also allows a provider to set a firm-wide, consistent baseline, rather than responding under time pressure when the first client request arrives.

Reduce future friction. Because responses are persistent and prepopulated, participating early means subsequent client requests require minimal incremental effort—update if needed, then decide whether to release client-facing responses.

Redirect duplicative client surveys. Once a provider participates in L.E.G.A.L., they can encourage clients that send bespoke GenAI surveys to use L.E.G.A.L. instead. This allows the provider to release existing responses, if they so choose, rather than completing yet another one-off questionnaire, while still meeting the client's information needs.

In short, providers participate voluntarily to gain market-grade insight, get ahead of inbound requests, and replace fragmented client surveys with a single, reusable source of truth—all while retaining full, client-by-client control over what is shared.

20. Are all the questions mandatory? Do firms need to respond to Questions 6–16 of the Provider Survey?

While no individual question is mandatory, clients will be made aware of missing responses, including Questions 6–16, while the composite benchmarking that is a benefit of participation is also calibrated to

participation—i.e., providers receive benchmarking only for the questions in the survey in which they participated.

L.E.G.A.L. is designed to be transparent about what is and is not included in any given dataset:

- **Client-facing extract (Questions 1–5):** If a provider authorizes release to a Requesting Client, that client receives the provider’s submitted responses to Questions 1–5 as if the client administered the survey directly. If a provider leaves an item blank, the client will see that it is unanswered.
- **Client-specific benchmark reporting (Questions 1–16; hybrid identified + de-identified):** Client-specific benchmark segments are shown only where at least five providers are included; de-identified dot plots/distributions are shown only where at least 20 providers are included. Where these minimum thresholds are met, client-specific benchmark reports may include dataset completeness transparency at two levels:
 - *Panel coverage list:* A list of firms included in the report (submitted + authorized release to that Requesting Client) and firms requested by the client but not included (did not submit and/or did not authorize release)
 - *Question-level completeness:* Within specific benchmarks, identification of which included firms are not included in that benchmark because they did not answer the relevant question(s).
- **Composite market reporting (program-wide):** In the composite market report, no providers (whether included or excluded) are identified without express permission.

In short, providers can skip any question, but nonresponse will be visible in client-specific reporting as “not answered” and/or through question-level completeness notes, while the benchmarking the provider receives will be limited to the questions in which they participated.

Optional is Truly Optional (Questions 17–24). The express exception to the above is the optional section. As the instructions state, “If a question sparks a strong answer, we’d love to hear it. If not, skip it.” The optional section is the safe space for providers to enrich the collective conversation by selectively commenting on topics where they have strong opinions and supporting (anonymous) anecdotes. There will be no reporting whatsoever on which providers responded to which questions in the optional section. Indeed, absent express permission, we will not use verbatim quotes, even in a de-identified manner—we will only summarize and paraphrase.

Confidentiality, Sharing, Data Handling, and Security

21. How does controlled client-facing sharing work for providers?

Client-facing sharing is permission-based, client-specific, and never automatic. When a client requests a provider’s responses, the provider decides whether and when to authorize release of responses to that specific Requesting Client. No responses are shared unless the provider explicitly authorizes disclosure to that Requesting Client.

L.E.G.A.L. uses provider responses in two distinct lanes, with different visibility rules.

Lane 1 – Controlled full disclosure (Provider Survey Questions 1–5)

What can be shared: Only Provider Survey Questions 1–5 are eligible for direct, provider-identified sharing with a Requesting Client.

When sharing happens: Responses are shared only when the provider has expressly authorized disclosure to that specific Requesting Client (client-by-client permission).

How it is treated: When released, responses are treated as confidential provider-to-client information, as if the client had administered the survey directly; this does not authorize sharing with other clients or third parties.

Fresh releases and control: If a client requests a fresh release, providers receive advance notice and an opportunity (not an obligation) to update—or to withdraw authorization for that Requesting Client.

Withdrawal: Providers can withdraw authorization for a particular client at any time; withdrawal applies prospectively and does not require program-level withdrawal.

Lane 2 – Benchmarking and reporting (client-specific + program-wide; hybrid identified + de-identified)

Client-specific benchmark reporting (Provider Survey Questions 1–16): Requesting Clients may also receive a client-specific benchmark report that contextualizes provider responses, subject to strict visibility limits:

- *Questions 1–5:* Where the provider has authorized disclosure to that Requesting Client, Questions 1–5 may be reflected in provider-attributed form (including comparative views) in the client-specific report.
- *Questions 6–16:* Provider responses are used only in de-identified and/or aggregated form. Individual provider responses are not disclosed in a provider-attributable way, though they may be reflected as unlabeled points in de-identified visualizations where thresholds are met.

Participation and dataset completeness transparency: Client-specific reports may include (i) a panel coverage list identifying firms included in the client’s report and firms requested by the client but not included (did not submit and/or did not authorize release to that Requesting Client), and (ii) within specific benchmarks, identification of which included firms are not included in that benchmark because they did not answer the relevant question(s). This identifies coverage and nonresponse—not any firm’s underlying non-client-facing answers.

Minimum thresholds: No client-specific segment (including averages) is shown unless at least five providers are included for that question/segment. De-identified dot plots/distributions are shown only when at least 20 providers are included for that question/segment. Below these thresholds, the attendant benchmarks and visualizations are not provided.

Program-wide composite market reporting: Provider responses may also be used in program-wide, de-identified and/or aggregated benchmarking and longitudinal analysis, including the composite market report shared with all participants. No firms (whether included or excluded) are identified in the composite market report absent express, written opt-in.

Client Survey responses are never shared in attributable form

Client Survey responses are used only as de-identified and/or aggregated Benchmarking Data and are never shared with providers or other third parties in client-attributable form.

Thus, for providers, the key features of the model include:

- *Client-by-client control.* Authorization is granted (or withheld) separately for each Requesting Client. Granting access to one client does not grant access to any other.
- *Normal bilateral treatment.* When shared, responses are treated as confidential provider-to-client information—exactly as if the client had administered the survey directly.
- *Defined scope.* Only Questions 1–5 are eligible for provider-identified disclosure. Questions 6–16 are never disclosed in a provider-attributable form.
- *Persistence with flexibility.* Once authorized, responses remain available to that client unless the provider chooses to update them or withdraw release authorization. Providers are notified before any fresh release and may revise responses or revoke authorization if desired.

In short, L.E.G.A.L. reduces duplication without changing control dynamics: Providers retain full discretion, clients receive consistent information, and benchmarking remains de-identified by default. For more information, see the [L.E.G.A.L. Nondisclosure Policy](#).

22. How do updates or revisions to responses work?

Responses in L.E.G.A.L. are persistent, updatable, and under participant control.

L.E.G.A.L. is designed as an ongoing intelligence system, not a one-time survey. When an organization completes a survey, its responses are retained as a baseline and prepopulated for future requests. Participants may update their responses at any time, but they are never required to do so unless something has materially changed.

For providers that have already responded, in particular:

- When a client requests responses, providers receive advance notice and have an opportunity (but not an obligation) to revise their answers before any authorized release.
- If a provider is satisfied with its current responses, no action is required.
- Authorizations to share responses with a specific client remain in effect unless the provider chooses to withdraw or modify them.

This model reduces repeat burden while supporting longitudinal analysis—making it possible to see which assumptions hold, which change, and how quickly the market is actually moving.

In short, participants do the thinking once, update selectively, and retain control throughout.

23. How is participant data handled and secured

L.E.G.A.L. is designed to be safe by default: de-identified by default, consent-driven disclosure, and strict use limitations. All participation in L.E.G.A.L. is governed by the [L.E.G.A.L. Nondisclosure Policy](#).

What we collect (and what we don't):

- We collect survey responses (client and provider), a program Point of Contact for administration and notices, and designated internal collaborators.
- If a client supplies provider contact emails to facilitate outreach, we use them only to administer that survey cycle and then delete.
- We deliberately limit collection and retention of personally identifiable information to what's needed for program administration.
- We also process limited system access and security metadata (for example, authentication/session logs) solely to protect accounts and administer secure access; it is not used for benchmarking and is not shared in controlled disclosures.

How information is used (and not used):

- We do not sell individual participant data. Data is used only to (i) transmit authorized provider responses to requesting clients (Questions 1–5 only), (ii) produce de-identified/aggregated benchmarking and trend analysis, and (iii) support deeper, opt-in collaboration where separately consented.
- Contact information collected for L.E.G.A.L. is used only for L.E.G.A.L. administration and is not added to marketing lists or repurposed for unrelated outreach.
- Client-facing disclosures never include Point of Contact or other contact information, client-supplied outreach email lists, or system access/security metadata.

Security and access controls:

- We maintain strict internal controls, including limiting raw submission access to the core project team and storing contact information separately from composite outputs.
- Security controls include encryption in transit and at rest, role-based access control, SSO/MFA protections for admin access, and defined retention/deletion operations for systems and backups.
- For more, see [L.E.G.A.L.'s security documentation](#).

Contact information retention and deletion:

- Provider/client Point of Contact information is retained solely for program administration (e.g., notices related to fresh releases or dashboard enablement) and is not shared with other participants or Requesting Clients.
- Client-supplied provider emails (if provided for outreach) are used only for that outreach and then deleted on the policy schedule after the response period closes; ongoing administration relies on provider-entered Point of Contacts.

- “Deletion” refers to contact records stored in L.E.G.A.L.-specific program systems; it does not require purging ordinary-course business communications (e.g., email threads) or enterprise backups maintained under standard practices.

Important scope note:

L.E.G.A.L. is not designed for privileged communications or matter-level content. We do not request sensitive personal data (including special-category data), government identification numbers, financial account numbers, or HR/personnel records, and participants should not provide such information in free-text fields.

For full details, see the [L.E.G.A.L. Nondisclosure Policy](#)

