

Your new colleague is a machine.

Why 70% of BD tasks will be carried out by AI agents by 2027, and why that might not be a bad thing

There's a quiet truth in law firms that rarely gets said out loud: your best people are stuck doing the worst jobs.

Not because they lack ability. Quite the opposite; because they're trusted not to screw things up. So, when the credentials need formatting, the CRM needs updating, or the directory deadline is looming, it too often goes to the person who'll just "get it done". Quickly. Quietly. Accurately.

This is both inefficient and frustrating.

This paper makes a simple, provocative claim:

by 2027, 70% of these business development tasks, as they're currently structured, will be handled by AI agents.

Not just automated. Completed. Reliably. Repeatedly. At scale.



And our second thesis, which may end up as more of a plea, is that this should **NOT** be a process of *replacing people* and doing the same thing with less resource, but rather a call-to-arms to consider what *more could be done* with the people you have in your team; those great people who are currently doing work that is neither rewarding nor value-creating.

Before we go any further, let's define what we mean by "agent."

An **AI agent**¹ is a digital colleague, trained to perform structured, repeatable tasks with speed, context, and autonomy.

Unlike chatbots or static tools, agents aren't reactive. They plan, act, and learn, often operating in the background to keep things moving without being asked. They are trained on domain-specific data and have the *agency* to complete tasks by being connected into a firm's systems.

¹ <https://www.anthropic.com/engineering/building-effective-agents>

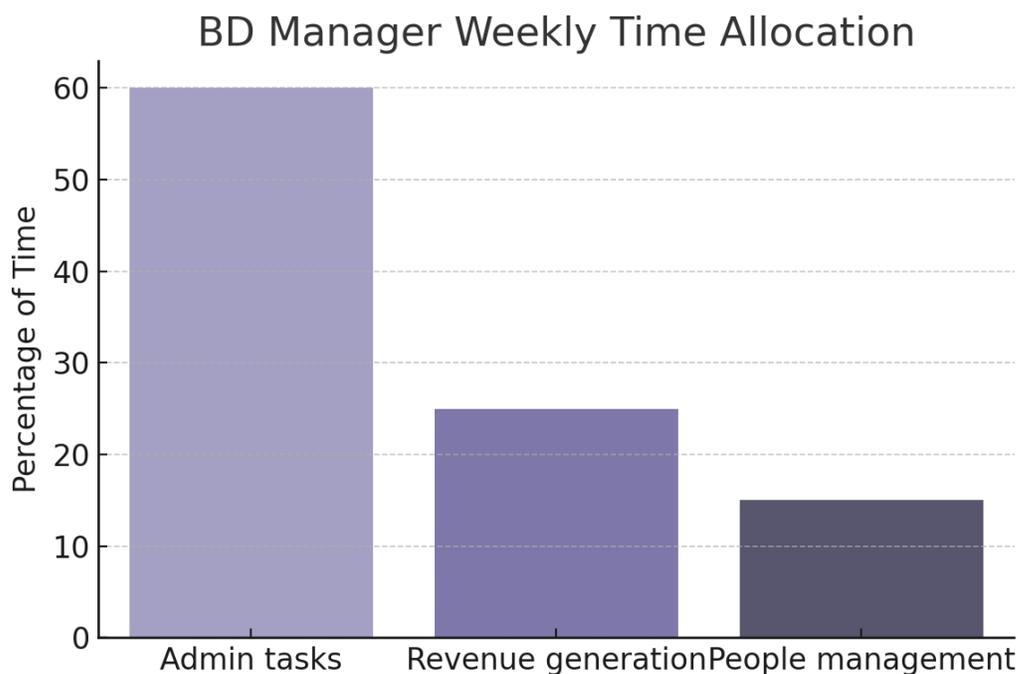
The status quo – good people, bad systems

Speak to any CMO, BD lead or marketing manager and you’ll hear the same thing:

“We’ve got brilliant people who want to be out in front of clients — actually developing business — but they’re buried under repetitive, manual tasks that are critical but utterly draining.”

If this sounds familiar, you’re not alone. Job descriptions at top firms like Latham & Watkins² list BD tasks like maintaining databases, coordinating submissions, and generating reports as central to BD roles. These are essential tasks, the oil that keeps the engine running, but they’re not the reason anyone gets out of bed in the morning, nor do they require a high level of autonomy, experience and imagination.

BD Manager time allocation chart³:



Legacy technology compounds the problem further. Tech stacks are outdated and clunky with data that is both dispersed and incomplete. We’ve lost count of the number of firms we’ve spoken to who are planning a *CRM clean-up*.

Part of this is down to the technology itself, and part down to the immense challenge of getting the right data in the right places at the right time, when so much of it resides in the

² Latham & Watkins LLP BD Analyst JD <https://www.lw.com>

³ Growleady Blog: <https://www.growleady.io/blog/what-is-the-typical-day-of-a-business-development-manager>

heads of lawyers, with no obvious way of extracting it beyond sending out forms that never get completed.

As [Owen Williams](#), M&BD Director and Partner at Simmons & Simmons puts it:

“Today we have many well-intentioned, well-educated puzzle builders...[but] our architecture needs to change.”

It’s not that people don’t care or aren’t capable of higher-value work, it’s that the fundamentals *have to get done* and the current system means that doing them takes so much time that there simply isn’t the capacity for anything else.

You’re not behind — you’re reading the wrong rulebook

To date, the way people have traditionally tried to solve this problem is brute force. Hire more people, get them working harder and eventually we’ll climb that hill. But this is a Sisyphean task. It isn’t a resourcing issue, it’s an architecture issue. More puzzle builders won’t fix the puzzle.

Indeed, that puzzle exists in part because the systems we’ve built rely on humans to make them work, to remember to log things, to reformat the same insight six different ways, to bridge the gaps between disconnected platforms. But more and more organisations, like Shopify⁴, from a range of industries are recognising that AI can play a powerful and transformative role in their future workforce planning.

Within the next two years, legal Business Development & Marketing (**BDM**) teams should be hybrid by design, an exciting blend of humans and intelligent, AI enabled digital colleagues. Not just at the global elite firms. Everywhere.

This isn’t about reducing headcount. It’s about scaling capabilities to generate opportunities in a way that’s never been possible – until now. It’s about unlocking your team’s full potential by shifting the burden of the repetitive to agents trained to handle it faster, better, and without complaint. Ultimately, it’s about creating a BD team that can add significant top line revenue to a firm by capturing more data, connecting more dots and identifying more opportunities at scale.

⁴ <https://www.forbes.com/sites/douglaslaney/2025/04/09/selling-ai-strategy-to-employees-shopify-ceos-manifesto/>

Abundant Capacity: What AI Agents Actually Are

For decades, law firms have rationed their business development efforts.

Not intentionally, but structurally. There were simply never enough hours, people, or patience to do all the things everyone agreed were important: keeping the CRM up to date, capturing credentials, tailoring pitches, logging client feedback. So teams made trade-offs. They prioritised. They cut corners. They coped.

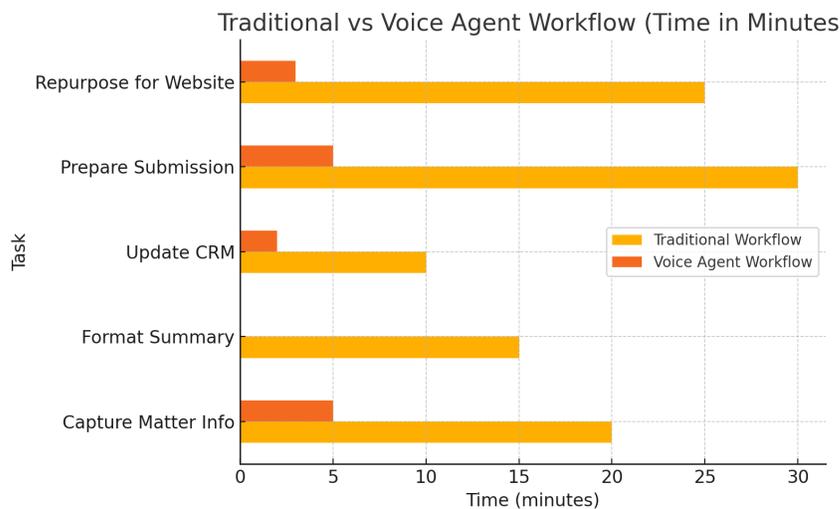
AI agents are the tireless colleagues we always wished for (but could never afford). They don't take holidays, they learn continuously, they have no delusions of doing "something more interesting" after six months and, importantly, never forget a single detail. With every interaction, they get better through identifying patterns, drawing insights, and making links that humans don't have the time or memory to do consistently.

These agents have been trained by senior BD professionals with decades of experience on domain-specific marketing, sales and BD workflows. They know exactly what to ask and when and how to ask it. They can prep for client meetings, develop large parts of directory submissions, draft pitch credentials, update websites, generate client reports, all from short, simple humanlike interactions.

And it shouldn't be thought of like software. This is **abundant capability** at a scale completely inconceivable before.

It is entirely possible *today* that a personalised agent can be deployed to support every lawyer in the firm with their BD efforts – drafting follow-ups and identifying opportunities *faster* than any human ever could.

Traditional vs Voice Agent Workflow Chart:



There are also different ways of interacting with them than any previous tech. They can be engaged with in a fully natural way – for example simply by speaking. A voice conversation is three times faster than typing⁵, and agents will be able to understand nuance, won't forget the details and can act accordingly.

This is what we mean by abundant capacity:

- Every lawyer can have their own assistant.
- Every BD task can be picked up without delay.
- Every insight can be captured the moment it's spoken.

More than an assistant – collaboration and coaching

Agents won't just be capable of taking care of the fundamentals. As each of these agents are programmed to work behind the scenes, keep each other updated *instantly* and identify collaboration opportunities, they will create a knowledge base that goes well beyond what any human (or existing CRM) can handle.

Because law firms don't suffer from a shortage of intelligence or relationships. They suffer from a shortage of *connected* intelligence and *activated* relationships.

One partner holds a long-standing client contact.

Another team has done similar work for a similar business.

A third just published a sector outlook that would be perfect to send across.

The problem? None of them are talking to each other. Not because they don't want to, but because no one has time to stop and stitch it all together.

But the agents they have been speaking to will have the time.

These agents don't rely on people remembering to log things or update a database. They work in real time, capturing critical information through short, focused conversations. They extract nuance. They store context. They create structure.

Even better, they're proactive. They can call *you* at just the, after a meeting, before the memory fades, and capture insights that would otherwise be lost. With each update, they contribute to a living, breathing network of intelligence across the firm.

This isn't just better data entry. It's the missing link in the long-standing challenge of CRM adoption. Where traditional systems rely on manual input, and semi-automated platforms extract what they can from calendars and inboxes, voice agents unlock what's still in people's heads. They are the first step toward operationalising the relationship capital firms

⁵ <https://www.forbes.com/sites/tjmccue/2019/04/24/how-to-write-more-words-effectively-in-less-time/>

already possess but rarely harness. As Mercer (2024)⁶ notes, "*Relationships remain individual, invisible, or incidental. Treated as folklore rather than infrastructure, valuable opportunities leak away.*"

Every lawyer can have their own agent. Every agent talks to every other agent. And together, they knit together an accurate, constantly updating map of who knows what, who's spoken to whom, and what should happen next.

This is smart collaboration in practice. Not a cultural aspiration, but a systems-led reality. As Gardner (2016)⁷ argues, firms that share knowledge across silos don't just collaborate better. They win more business, build deeper client relationships, and innovate faster. Voice agents are the operational enablers that finally make that possible at scale.

And it doesn't stop with knowledge. It's about *mindset*.

According to DCM Insights, professionals who outperform in commercial settings demonstrate three activator behaviours: Committing, Connecting and Creating. These behaviours require timely action, shared insight and visible follow-through; all of which voice agents can amplify at a scale no human team could replicate (DCMi, 2023)⁸.

And finally, they can also support with *behaviour*.

Unlike traditional CRMs or dashboards, these agents can provide timely, personalised prompts that guide professionals toward optimal actions. For instance, a BD agent might remind a partner 20 minutes before a client lunch about previous discussions, recent firm insights relevant to the client, and suggest a follow-up action — perhaps even drafting the follow-up email in advance.

The effectiveness of such nudges is well-documented. A comprehensive meta-analysis published in the *Proceedings of the National Academy of Sciences* found that choice architecture interventions, or "nudges," promote behaviour change with a small to medium effect size (Cohen's $d = 0.43$), demonstrating their significant impact across various domains (Mertens et al., 2022⁹).

By integrating these nudges into daily workflows, agents can subtly influence behaviour, leading to improved client engagement and business development outcomes.

⁶ Mercer, A. (2024). *From Contacts to Capital: Rethinking Relationships in Professional Services*. LinkedIn. Available at: <https://www.linkedin.com/pulse/from-contacts-capital-rethinking-relationships-services-al-mercer-ebotf/>

⁷ Gardner, H.K. (2016). *Smart Collaboration: How Professionals and Their Firms Succeed by Breaking Down Silos*. Boston: Harvard Business Review Press.

⁸ DCMi. (2023). *The Activator Mindset*. Available at: <https://www.dcmainsights.com>

⁹ Mertens, S., Herberz, M., Hahnel, U.J.J. and Brosch, T. (2022). The effectiveness of nudging: A meta-analysis of choice architecture interventions across behavioral domains. *Proceedings of the National Academy of Sciences*, 119(1), e2107346118. <https://doi.org/10.1073/pnas.2107346118>

The 50% rule: what AI agents should already be doing

Whilst much of this still feels like future-state, a surprising amount is already possible today.

In Q1 2025, we analysed dozens of BD&M job descriptions from major UK recruiters and mapped them against current AI capabilities. Based on this analysis, at least 50% of the tasks listed can be carried out by agents today with this figure rising to 70% in 2027¹⁰.

And this isn't just automation.

These tasks can be intelligently handled and completed faster, better, and with less human effort.

Task		Human In The Loop (HILT)	
Event invite list building	✓		
Directory submissions	✓		
Credentials management	✓	✓	
Website updates	✓		✓
Pitch credential collation	✓	✓	
Sales process follow-up	✓		
Client updates	✓		✓
General follow-ups	✓	✓	
BD planning			✓
Strategic client growth			✓

This does of course beg the question: if half of your team's current workload can already be handled by agents, what exactly is your team for?

¹⁰ This extrapolation is based on the current pace of AI agent development in other industries.

This isn't about loss — it's about lift

We understand the fear. Saying “50% of your tasks can be carried out by an agent” can feel like an existential threat¹¹.

But it's not.

It's an invitation.

A human-agent team, properly conceived, delivers more than just output. It lifts morale. It allows people to spend their time doing work that matters. It frees them to support lawyers more meaningfully. To think strategically. To create. To create a culture and an organisation that makes the days worth getting up for.

Most importantly, it frees them to do the one thing AI can't (yet) do: be human. Build rapport. Read the room. Show empathy. Earn trust. These are the critical, emotion-based skills that sit at the very heart of business development, and they are skills that no amount of data or training will replace anytime soon. And they're largely the reason anyone wants to do work in the first place.

Trust is the cornerstone of professional services sales. As David Maister¹² explains in *The Trusted Advisor*, trust is built through a combination of credibility, reliability, intimacy, and low self-orientation. This “trust equation” depends on emotional nuance and personal engagement; capabilities that, for now, remain deeply human (Maister et al., 2000). It is also the foundation of psychological safety and building strong interpersonal relationships. But it takes time to build, time that people often don't have.

In professional services, relationships are paramount. A recent study found that 59% of customers say they would buy from a supplier on the condition that they'd met in person before, underscoring the importance of personal interaction in complex sales (Upland Software, 2021¹³). Furthermore, research indicates that personal communication in B2B business plays a critical role in closing deals and establishing long-term loyalty (Sultanov, 2023¹⁴).

Agents can significantly enhance this process. By identifying relevant triggers, capturing timely intelligence, and surfacing contextual insights, agents help human professionals show up better prepared, more attentive, and more attuned to client needs. In short: humans build trust, agents help them do it faster and with more impact.

¹¹ <https://edition.cnn.com/2025/05/30/business/anthropic-amodei-ai-jobs-nightcap>

¹² Maister, D.H., Green, C.H. and Galford, R.M. (2000). *The Trusted Advisor*. New York: Free Press.

¹³ Upland Software. (2021). People Buy from People: Why Sales Relationships Still Matter.

<https://uplandsoftware.com/altify/resources/blog/people-buy-from-people>

¹⁴ Sultanov, D. (2023). The Importance of Human Relations in Business.

<https://www.linkedin.com/pulse/importance-human-relations-business-damir-sultanov-ahaqe>

The future of business development lies in this synergy between human intuition and digital efficiency. By leveraging the strengths of both, firms can foster stronger relationships and drive growth in an increasingly competitive landscape.

Something has to give

Let's be honest. We understand that there's a risk here.

If junior roles are stripped of their traditional routes into the profession, where do new BD execs learn the ropes? How do they get their hands dirty, learn the dark arts of BD and build the commercial instincts that come from doing the job? And when do they develop the human relationships and network that will help them progress?

It's not just business development that will need to reckon with this.

The same applies to lawyers, consultants, accountants; anyone who's ever been trained by doing the "grunt work" first.

And here's the difficult truth: we don't yet know what replaces that path.

There's no playbook for how professional training evolves when the first rung on the ladder disappears. That's why we can't afford to sleepwalk into this transition. We have to go in clear-eyed, conscious of what's gained — but also of what's at risk.

This doesn't mean slowing down.

It means being deliberate: designing new kinds of progression, coaching, and mentoring with as much creativity as we're putting into the technology.

What we're aiming for: humans and agents working together

Because if we get it right, what emerges on the other side could be better.

A team where the work is divided more smartly. Where junior professionals get exposure to clients earlier, not later. Where the role of a BD exec shifts from admin-heavy to insight-led.

Where the human-agent relationship looks, in many ways, **like good management always has.**

You brief agents the same way you brief people¹⁵:

You **task** them clearly.

You **trust** them to do it,

And you **tend** to the output — checking in, refining, course-correcting over time.

¹⁵ <https://www.bioss.com/gillian-stamp/the-tripod-of-work/>

Perhaps by 2027, these are the roles you have in your team:

Role	Type	Description
BD Manager	Human	Strategic lead, connects dots across teams, translates insight into action
Client Relationship Manager	Human	Owns key accounts, deepens relationships, coordinates across service lines
Campaign Manager	Human	Crafts messaging, drives creative campaigns, elevates brand and profile
BD Executive	AI Agent	Lawyer's personalised assistant – captures insights, drafts credentials, updates CRM
CRM Assistant	AI Agent	Tracks activity, surfaces insights, prompts follow-ups, maintains contact health
Pitch Workhorse	AI Agent	Builds pitch packs, mines credential databases, applies templates intelligently
Events Agent	AI Agent	Manages invites, RSVPs, post-event summaries, and CRM updates

Act now – the window is closing

The legal sector is not just slow to change. It is at risk of being left behind altogether. Sitting back and watching your competitors deploy agents is not a tactic – it's a corporate and career-defining mistake.

Across B2B industries, sales and marketing teams are deploying AI agents¹⁶ to reduce friction and increase velocity. In retail, in insurance, in finance. The world is moving at pace.

Meanwhile, law too often stays locked in its ivory tower. It talks to itself, learns from itself, and benchmarks itself against... itself. The result? An echo chamber that lags behind the pace of change happening just across the street. Hyper-personalised marketing. Intelligent, automated sales outreach. Dynamic customer engagement models. These are not pipe dreams. They are happening. Now. And they are ripe for adoption across the legal industry.

Law has a window. Not to catch up. To leapfrog. AI agents are the chance for firms to move from reactive to proactive. From admin-heavy to insight-led. From slow to seamless.

But that leap requires a conversation at the top. One about risk appetite, ambition, and whether a firm is truly willing to do things differently.

And if you wait? Someone else will leap first.

¹⁶ <https://www.artisan.co/>

The game has changed.

This is the big question. Whether you're a foot soldier or a CMO, the opportunity is the same: time.

Time to do more of the things you want to do. Time to focus on all the things AI cannot do (yet). Time to think, not just react.

And yes, time to develop business with other humans, as most BD job titles suggest not drive an activity spreadsheet or rewrite "synergy" as "collaboration" for the fifteenth time on a pitch deck.

For the exec, it might mean finally shadowing client meetings, building stronger partnerships, creating better insights.

For the senior leader, it means stepping off the hamster wheel and taking a wider view. Investing time in growth strategy. Building IP. Coaching your team. Delivering a personalised service to your internal client base. Providing a level of consistency that was never before possible.

Your best BD person. With infinite capacity. Available to every lawyer, whenever they are required.

AI agents can make this a hyper-scalable reality **today**. Add voice and things just get quicker.

For your team, this means higher morale, more rewarding lawyer interactions and less churn.

For your firm, this means more revenue.

If you're reading this, it's probably because you were pretty good at the old game.

Are you ready to play a new one?

If you want to find out more, check out our website: <https://legalengine.co.uk/>

Or try our first Assistant, Leonard: <https://demo.legalengine.co.uk/>