

The Future of Contracting:

How AI is Transforming CLM and Legal Ops Strategy

A Q&A with Sumi Trombley, Senior Advisor and Contract Innovation Leader,
and Brandi Pack, Director of Innovation, UpLevel Ops

As the legal industry increasingly embraces AI, nowhere is the shift more visible—or more promising—than in Contract Lifecycle Management (CLM). From automating contract review to deploying independent AI agents that negotiate NDAs, AI is streamlining routine legal tasks and unlocking time for more strategic work. **Brandi Pack, Director of Innovation at UpLevel Ops**, sits down with **Sumi Trombley, a seasoned Legal Ops strategist and CLM innovator**, to explore what's next in the evolution of contracts, workflows, and transformation at scale.

Brandi: CLM is one of the legal tech areas that is seeing real traction with AI. From your perspective, what's the most significant shift we're seeing right now?

Sumi: What I'm seeing is a maturing of how AI is being used within existing CLM platforms. AI isn't replacing core functionality—it's enhancing specific capabilities that align with a platform's strengths. For example, CLMs with strong repository functionality are investing in AI for better metadata extraction and search, while those focused on negotiation are looking to AI to better support playbook-driven review. It's still early, and in many cases, AI is a feature rather than a foundational capability. But the shift is in how thoughtfully companies are starting to align AI with business needs.

Q: You've discussed the importance of readiness work before implementing tech. What should teams do before they even start evaluating CLM tools?

A: Understanding your current state is critical, but we're also exploring ways AI can support that foundational work. One great example is template harmonization. This is a classic readiness activity that can be time-consuming and complex. We've developed a Custom GPT that helps expedite this process by analyzing your existing templates and identifying structural or language inconsistencies. The legal team still needs to evaluate the risk implications, but having a clear comparison of terms across templates is a huge time-saver and gives you a clean slate for decision-making.

Q: Legacy migration is a major pain point in CLM. What advice would you give teams planning their contract data migration in an AI-enhanced CLM world?

A: Plan early and be realistic. Migration is not just about uploading documents—it's about ensuring they're searchable, tagged, and structured in ways that allow AI to extract value from them. You'll want to consider OCR, metadata tagging, and linking related documents like MSAs and SOWs. And every step introduces potential complexity and cost. I recommend a phased, scoped approach that starts with your most valuable contract types and use cases.

Q: In your writing, you've predicted that AI agents could eventually handle parts of contracting independently. How close are we to that reality?

A: We're definitely seeing progress, especially with tools that can autofill standard NDAs, compare third-party papers to templates, or flag key deviations based on playbooks. That said, the idea of true AI-led negotiation—where the system redlines and makes judgment calls—is still aspirational, especially within legal tech platforms. There's still a lot of room for improvement in redlining capabilities. Over the next 12 to 18 months, I think we'll see more automation around contract workflows and risk alerts, but human involvement will remain essential in anything nuanced or high-stakes.

Q: How can legal teams use AI to reclaim time for higher-value work while maintaining control over risk?

A: It really comes down to trust—both in your technology and your internal processes. You want to design

systems where AI handles repeatable, low-risk tasks, like standard NDAs or responding to FAQs. But it's equally important to define thresholds for when human involvement is required. AI doesn't replace judgment—it should help legal teams reserve their judgment for the work that truly needs it. That's how we shift from just managing work to driving real impact.

Q: What common missteps do you see when legal departments jump into automation or AI without a clear plan?

A: One common mistake is trying to solve everything at once. Teams want a solution that handles every exception, but that adds complexity and slows down adoption. I tell clients to start with high-frequency, high-impact use cases and build from there. Another big miss is underestimating the human side—change management is just as important as the technology itself. Without buy-in and training, even the best tools can fail.

Q: What's your bold prediction for how AI will reshape legal work, especially contracting, in the next 12 to 18 months?

A: I think we'll see more convergence: CLM, playbook management, workflow automation, and knowledge management starting to live together in unified environments. AI will help legal teams interact with information and tasks in more intelligent, conversational ways. But rather than AI negotiating contracts independently, I expect we'll see better orchestration, where AI assists with drafting, routing, escalating, and surfacing insights across platforms. It's less about full automation and more about creating seamless, low-friction experiences that empower legal teams and the business.

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