50

use cases for law firm legal automation

Looking for some legal automation inspiration? We've collected 50 real-world uses of legal automation used by law firms.

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Preamble

So you probably understand the irrefutable benefits of deploying legal automation in your firm (you're no dummy) - but you're still scratching your head as to what to build.

At Josef, we see new builds hot off the press every day. We can't think of a better way to provide inspiration than to share real-world cases from law firms around the world.

The possibilities are endless…

People & HR

People & HR

1 **Unfair Dismissal bot**

Assists in determining if an employee can bring an unfair dismissal claim.

2 **Independent Contractor Agreement bot**

A tool to generate an independent contractor agreement to engage another person or business to provide services.

3 **Continuing Legal Education bot**

Records continuing legal education details and maintains a record.

4 **Consultancy Agreement Generator**

A bot that generates consultancy agreements.

Client Intake
& Operations

Client Intake & Operations

5 Business health check

A tool to identify legal risks facing a small business.

6 Diversity and Inclusion Maturity bot

Bot that creates a D&I benchmark so you can measure future progress.

7 KYC (know your client) bot

An information gathering tool to onboard new clients.

8 Costs Agreement bot

A bot that generates a costs agreement between the law firm and the client.

Client Intake & Operations

9 Engagement Letter bot

A bot that generates an engagement letter for new client work.

10 Concierge bot

A bot that acts as the concierge for a law firm's intranet, pointing people to the right places and people.

Disputes

Disputes

11 **Statement of Claim bot**

A bot that generates the Statement of Claim (Particulars of Claim) and additional claim forms needed to file a matter with the courts or arbitration tribunal

12 **Cease and desist letter bot**

Generates cease and desist letters ready to be sent to the opposing party.

13 **Deed of release bot**

A tool that helps users generate a Deed of release (to resolve a dispute).

14 **Letter of demand bot**

A tool used to generate letters of demand to send to debtors.

Contract
Automation

Contract Automation

15 Application of GST/VAT bot

Considers whether GST/VAT applies to a specific transaction.

16 Award Application Guidance bot

Helps assess whether an employee is covered by an award (which regulates pay rates and conditions of employment) and if so, what award is applicable.

17 Business Health Check

A tool to identify legal risks facing a small business.

18 Case Management Track Assistance bot

Helps assess which case management track a dispute before the courts will be assigned to.

Contract Automation

19 **Consultancy Agreement Generator**

A bot that generates consultancy agreements.

20 **Estate Planning bot**

A tool that assesses a client's estate planning needs and makes recommendations for next steps.

21 **Franchise Documentation bot**

Tool that generates a suite of franchise documentation, such as Franchise Agreement, Disclosure Document, and Information statement.

22 **Immigration Documentation bot**

A tool that generates immigration forms, such as the I-485 form.

Contract Automation

23 **IP Assignment Agreement bot**

Generates an IP assignment agreement.

24 **Lease Agreement bot**

Generates a lease agreement.

25 **Loan Agreement bot**

Generates a loan agreement.

26 **Master Lease Generator**

A self-service tool for generating leases.

Contract Automation

27 **Memorandum of Understanding bot**

A bot that automates the production of a memorandum of understanding.

28 **Power of Attorney**

A self-service tool for generating a Power of Attorney.

29 **Restrictive Covenants bot**

A bot that determines the laws in relation to restrictive covenants in a given jurisdiction.

30 **Series A Termsheet**

Self service bot for a Series A term sheet.

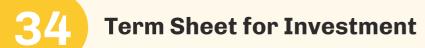# Contract Automation

31 Shareholders Agreement bot

Self-service document automation tool that generates a shareholders agreement.

32 Subscription Agreement bot

Generates an agreement for the purchase of shares from a company.

33 Tenancy Agreement bot

A tool that generates a residential tenancy agreement.

34 Term Sheet for Investment

A tool to create a term sheet for investment in a business.

Contract Automation

35 **Term Sheet for a Sale of Business**

A tool to create a Term Sheet for the sale and purchase of all the assets in a business.

36 **Terms of Trade bot**

A tool to record the essential terms and conditions on which a business will supply goods and/or services.

37 **Website Privacy policy bot**

A tool to generate a Website Privacy Policy that sets out the rules and processes a business must follow when dealing with its customers' personal information.

38 **Website terms and conditions**

A tool to generate the Website Terms and Conditions on which a business allows people to access and use the business website.

Advice

Advice

39 **Financial Services Assessment bot**

A bot that provides advice in relation to whether a particular organization requires a financial services license or not.

40 **Force Majuere assessment bot**

A bot that considers whether the force majeure clause in a contract is applicable

41 **Immigration status assessment bot**

A tool that considers the immigration status of an individual.

42 **Legal Professional Privilege**

Advises if legal professional privilege applies in a situation.

Advice

43 **Litigate v settle assessment**

A tool that helps a disputes team assess if they should advise their client to litigate or settle.

44 **Long service leave guidance bot**

Generate advice in relation to where a particular employee is entitled to long-service leave.

45 **Stamp Duty Calculator bot**

A bot that assesses the rate of stamp duty applicable in the sale of land.

46 **Superannuation Entitlement bot**

Determines whether or not particular employees are entitled to superannuation and what kind.

Advice

47 **Tax Disclosure Assessment bot**

A bot that assesses whether an individual needs to disclose their tax exposure to the relevant tax authority.

48 **Tax Obligations assessment bot**

A tool that assesses what tax obligations an individual has as an employee vs contractor.

49 **Visa Type Assessment bot**

A bot which determines what type of visa a person should be on in a particular jurisdiction.

50 **Whistleblower advice bot**

Determines whether a particular situation or disclosure is subject to a whistleblowing regulatory scheme.

So, where next?

Explore what Josef can do for you.

Learn how you can build legal bots to:

- Automate attorney-client interactions

- Seamlessly generate automated documents

- Provide scalable legal guidance and advice

Schedule a 30-minute live demo to see the platform in action and learn how legal professionals around the world are saving time, scaling their services, helping more people and delighting clients with Josef.

Book my demo

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