Law
Firms

Documents and contracts:

a practical guide to automating them.

Josef

Documents sit at the center of what we do as lawyers. Contracts. Agreements. Letters. Deeds. Court documents. The list goes on. And then there is the administrative work that sits couched around the legal work, insidiously sucking up precious billable time.

Thomson Reuters delivered a White Paper that stated more than 25% of lawyers' time is spent on work that doesn't generate income. By automating non-billable tasks, lawyers are gifted back the time and energy required to focus on activities that generate revenue.

Automating documents and contracts provides **numerous advantages** to the savvy law firm including the ability to:

- **Increase revenue (automation of non-billable work!)**
- **Increase lawyer retention (less drudgery!)**
- **Increase client satisfaction (more efficient and less error-prone legal work!)**

Automation isn't only about saving time and money: the client also has a better experience with the contract itself, for example by accessing an easy-to-use digital tool on their phone in a matter of minutes, rather than having to set up a meeting, or drip-feed instructions to the lawyer.

Tobias O'Hehir, Practice Manager at Lander & Rogers says "a key value of legal tech is its ability to enhance the relationship between the lawyer and client." Citing client satisfaction as a driver for the practice swiftly adopting automation.

Fail to plan, plan to fail

To create user friendly automated documents and contracts, begin by keeping some basic planning principles front of mind.

Start simple. Don't reinvent the wheel. Start with a really basic document. It will help you understand the tools, to eventually build with speed and confidence when building more complex automations.

Automate repetitive documents. These are documents that require the same information again and again, like a confidentiality agreement or employment agreement. You already know what information you need.

Select valuable documents. Just because something is repetitive, doesn't mean it isn't highly valuable to your firm. For example, think about a client intake form – these documents are used daily and they are crucial. Why not automate it?

"How often do you use each contract per month and how long does it take you each time you draft it? You can extrapolate those numbers over, say, a year to determine which contracts you would benefit most from automating,"

says Verity White, Founder of Checklist Legal

If you're still scratching your head as to what to automate, we suggest taking a look at this list of **50 use cases for automation for law firms** to gather inspiration.

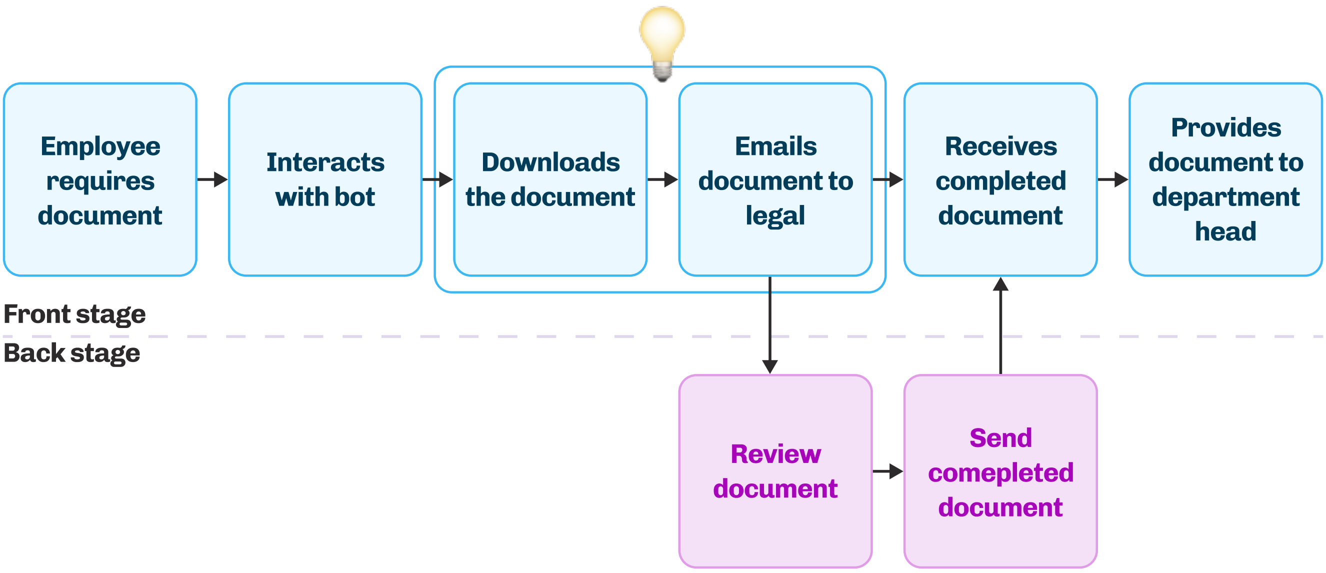
Preparation is key

Automating flawed processes or documents simply embeds bad habits in a company. Take the time to review the documents that you're automating to see if they can be **improved or simplified** before you automate them. When it comes to simplifying documents, look first to contracts widely used within the firm or that are crucial to an important stakeholder - like a Partner. Dig into the terms to assess where there is superfluous content. Strip it back. Steamline.

We also recommend process mapping to see what happens before and after the document is generated. You can do this by:

- Performing process mapping in a visual way using mind mapping tools like **Coggle** and **Miro**, or even post-it notes with trusty pen and paper
- Requesting feedback from stakeholders to make sure you haven't missed any blindspots or pain points

Going through the process of mapping the journey before building anything on a third party tech platform will allow you to see where your current process is flawed or what an ideal process looks like. It exposes every stage of the journey for everyone involved, not just the lawyers.



Discover more invaluable tips for process mapping and become part of the 45% of firms prioritising operations and workflows in the coming year[1] .

[1] Tech & the law Report 2022 - Tech & the Law 2022 Report - TR - Legal Insight Australia (thomsonreuters.com.au)

Build with the user front of mind

When a client or customer interacts with a bot, it's interacting with your firm. And if people don't like that experience, it won't leave the best taste in their mouth. User experience design is a strategy that helps improve both the experience and adoption of your bot, aligning the user and organisation's goals.

Here are some top tips to help you build a contract automation tool that people want to use:

1. **Put yourself in the end users' shoes:** when encountering a term in a contract, ask yourself if your users will understand it. If not, provide an explanation or more detail.

2. **Provide status updates:** Let your users know what they need to do next. Tell them how long an interaction will take and what they can expect.

3. **Shorter is better:** Is every step of the bot process essential? Trim the fat wherever possible.

4. **Hand over control:** Give users the ability to make (and remake) decisions along the way and let them know they have that authority. Add different pathways for different types of users, links and further information.

5. **Make it a pleasant experience:** Add some language that gives the tool personality and manners. Ps and Qs never go astray!

The best user experience is one where the end-user doesn't once think of the UX. It just works.

Test and iterate

No matter how well you build the digital tool, iterating and testing is crucial to making sure that you've captured all the issues – think of it as proofreading for technology. One cheap and easy way of doing this is to gather a small group of testers and collect feedback through a short survey. Here are some tips on how to do that well:

1. Choose 5-9 individuals who represent your intended users.
2. Keep the questions short, simple and open.
3. Include quantum (e.g. "on a scale of 1-10, how much did you enjoy ..."). This will allow you to measure impact over time.
4. Analyze the results carefully. Your users are experts in what they want, not what the solution should look like.

Connect it to your ecosystem

A lot of law firms' first automation project is to create a streamlined self-service document automation tool. Firms are generating their own legal documents whenever they need them. But what happens to the documents? Where do they go?

Sending them seamlessly into your document management system, or out for e-signature is a key component here. Look for solutions that integrate with platforms like Docusign, iManage, Google Drive, Sharepoint and others to make it possible at the click of a button. Learn more about integrations **here**.

And of course, post-launch make sure you keep the bots up-to-date, that you keep getting feedback from users, and that you keep checking usage over time.

Finally, we suggest taking the advice of Michael Barrett, Head of Technology at Hickson:

> **"Without reading any guides, I just dove straight in because Josef was easy to understand and I could start building the bot & workflow immediately."**

Continue your learning journey by **organizing a demo with Josef** today.