FAQs:

A practical guide to automating this repetitive task

Josef

Are you tired of managing the ever increasing demand of stakeholders for information from the legal team? Are their questions often repeated, over (and over) again?

FAQs are one of the easiest things for lawyers to automate and thus free up precious time and decrease workloads.The clue is in the name: frequently asked questions. If you already know the questions that place a high demand on lawyer time, you can prep the answers and deliver them via bot.

The in-house legal team at the leading multinational agribusiness organization **Al Dahra** has done just that, creating an **FAQ bot** that shares knowledge effortlessly, asynchronously and consistently.

“We were looking for something to take low-level tasks off our desk in order to focus on more strategic, high risk and high value matters for the business” said Dawn Sanderson, Group General Counsel.

Gartner predicts that 33% of corporate legal departments will have a dedicated legal technology expert to support the increasing automation of core in-house workflows, by 2023 - including automated advice and guidance.

If you’re ready to start saving time and decreasing lawyer workloads, explore this guide to find out how.

Preparation & Planning

The best way to begin the planning process is by knowing what needs to be fixed in your current FAQ process.

Margaret Hagan, director of the Legal Design Lab at Stanford University, asks a simple question: “what could be done better?”

Here are a handful of questions to guide a stakeholder interview (be it with a colleague or client) to make sure you are automating to solve real problems:

1. What could be better in the current FAQ process?
2. How do you currently seek help in the organization?
3. How do you want to receive information, guidance or advice?
4. Are there any specific pain-points? For example, inconveniences or inefficiencies?
5. Is there any work that I do that you think could be improved through automation?
6. Would you like to be able to self-serve any of the work that I do for you?

Once you’ve completed the necessary reconnaissance, step out where any answers fit hand in glove with providing automated advice via an FAQ bot.

Next, figure out whether you can triage anyone out of the legal team (e.g. because their matter relates to infosec or compliance) – this is key to saving your team from wasting time.

"Process map" your workflow

Automating flawed processes simply embeds bad habits in a company. Taking the time to map out how your business actually answers FAQs, is the first step. Break down the process into visual steps to enable a holistic view of the journey.

Begin by working out exactly where and how your bot fits into the FAQ process. Ask yourself five questions:

1. Where does this process start?
2. Who is involved?
3. What systems are involved?
4. What part(s) is the bot automating?
5. What is the tool's output?

Legal tool output is a critical part of the process. What is your tool actually delivering? Possible outputs include: guidance/advice, intake/interview of client, document, email notification.

Also consider what happens after the output. If a tool automates a document, does the user get it right away or does it get sent to the lawyer to review first? Is it going to be integrated with a matter management tool, like **Xakia**? Or will the answers simply be provided within the tool, with no further output?

Build with the user front of mind

When a client or customer interacts with a bot, it's interacting with your company. Keep it as short and sharp as possible, to make sure you don't lose the user from the outset.

Kate Sherburn, Who Gives A Crap's Head of Legal notes "the really important thing for us was that everybody in the business could access this service. Our solution needed to be intuitive and easy to use. And that's something Josef has provided."

To do this, identify all information required from the user. We call each piece of information a variable. So, what variables does your bot need in order to give guidance and answer FAQs efficiently?

For example, when thinking about the answers for FAQ bots:

1. Identify each question that comes up regularly (either from clients, customers or internally)
2. Categorize them into groups ("Customer service"; "regulatory"; "Risk management", etc)

Now you have a rough list of bots to build and their variables! Keep this list handy...

Your plan should include how your bot will collect information that has previously been collected manually. Begin by asking yourself: in what order should this information be collected?

Order is important because some of the information that needs to be collected is dependent upon previous responses. The order in which you collect these pieces of information has a great effect on the user experience.

By 2025, 30% of new legal technology automation solutions will combine software with staffing for a "human-in-the-loop" offering, **according to Gartner**. This speaks to the need for allowing users other avenues for reaching the legal team in the beginning, while they are adjusting to the experience of receiving advice from a bot.

At the end of the day, the tool needs to benefit both the end-users and the lawyers.

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.

Integrate & Future-Proof

Advice provided via an FAQ bot can be registered directly with your management system by integrating the bot with your existing tech tools. Look for solutions that integrate with platforms likeiManage, Google Drive, Sharepoint and others to make it possible at the click of a button.

"With the connection between Josef and Xakia, we've easily saved hours of manual effort not to mention created a much more intelligent process that can scale to meet the needs of Sonder now and in the future,"

says Michael Bates, Head of Legal at Sonder

Learn more about integrations **here**.

Spread the word!

Finally, you need to make sure your FAQ bot is being used religiously, to ensure you see the full return on your investment (while you and your team reap the rewards of your hard work). Here are three key tips to making sure your automation tools deliver the value that they should:

1. **Meet your users where they are:** think about where your users currently look for information (e.g. on a Sharepoint page or the intranet) and consider embedding the tools there. There's no need to reinvent the wheel!
2. **Don't be shy!** Tell users about your tool and why it matters to them. And your job isn't finished with one launch email. Host stakeholder meetings, use various channels, and send reminders in the months after launch too.
3. **Post-launch:** Make sure you keep the bots up-to-date, receiving feedback from users, and keep checking usage over time.

General Counsel of BUPA, Maria Marinelli puts it simply:

> **"How do we make more time to spend on the high risk and more complex legal matters? Digital solutions and pathways are an obvious way to do this but we need to stop thinking and talking about it and just do it!"**

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