

“Where do I start?”

# Legal automation for law firms: generate more

A step-by-step guide on why to automate and where to start your legal automation journey.



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# Preamble

Whether we like it or not, the legal profession is dominated by time based billing. In such a world, why would lawyers want to automate tasks to save them time? In a world where time literally equals money, why make firms more efficient?

For most law firms around the world, a significant proportion of work done is not actually billed. Think about all of those administrative tasks that sit around a case. Or the work done before the client is signed up, only to find out they don't have a case or it's not your area of expertise. Or even that difficult client who goes through your bill line-by-line, disputing things that took too long or that should have been done in a more efficient manner.

In this way, efficiency is best defined as the amount of time a lawyer spends working on a matter compared with the amount of time they bill for that matter. For example, if a client is willing to pay for 20 hours of a lawyer's time to complete a task, but said task actually takes 40 hours to complete, that equates to 20 hours of "wasted" time.

# Preamble

Clients are not only increasingly demanding that law firms use this kind of technology to operate effectively – they also prefer interacting with firms that offer some of their services via digital tools or automated technology. It's not about replacing the attorneys; it's about augmenting the work you do, providing efficient, convenient and transparent services to clients, all the while saving you and your team from doing repetitive, thankless work that often isn't billable.

Legal automation promises to bring your firm into the tech driven world your clients expect you to exist within. Automation makes the everyday easier for your lawyers, admin staff and your clients. It generates business and it can train your team. All while increasing your firm's bottom line.

If you're intrigued, we suggest you read on to learn everything you need to know about legal automation for law firms.

# Why automate?

## It increases revenue

[Thomson Reuters delivered a White Paper](#) on increasing efficiency in law firms and found that 83% of firms surveyed stated that spending too much time on administrative tasks was at least a moderate challenge. It also found that 81% of those firms had done nothing to address the wastage.

## Average lawyer's time allotment



According to Thomson Reuters, 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.

## It generates new revenue and business

Many firms are creating self-serve offerings for their clients. On face value it may seem counterintuitive, but by providing clients a way to easily solve their problems, attorneys are creating real value for their clients and, consequently, their firms.

By streamlining client interactions, firms generate incredible goodwill and repeat business from these tools. Think about that Microsoft Word questionnaire you send out by email that clients always send back incomplete and without the relevant documents. Imagine if that was a branded, seamless, beautiful digital tool that walked your client through the process. You're still there to help them if they need it, and they'll still come into the office for more complex cases. But, their experience of your services is efficient, transparent and convenient.

Many firms are productizing legal services by building automated self-serve tools that clients pay for and for which no lawyer time needs to be outlaid. That's right – lawyers are making money while they sleep, rather than from their timesheets.

Happy clients are loyal clients who not only reward law firms with ongoing business but often entrust them with higher-value matters. Legal tech is a gateway to generating a reputation as a firm that consistently delivers cost-effective, high-quality work- the key to business development for any firm.

## It simplifies the complex

Beyond the basic math of the ROI, there are many other tangible benefits to automating work which amounts to nothing more than drudgery.

Look at a transactional team working on a large-scale deal. The manual heavy-lifting done by attorneys is often menial and taxing. It's a minefield for errors. By using technology to automate some of these processes, the firm avoids human-error (which could well lead to losing the client) and increases staff happiness.

In a highly competitive market, firms are fighting for the best talent. By implementing tech that allows junior lawyers to undertake more rewarding work, they are inherently decreasing the risk of burnout and lawyer turnover. More quality talent = a better service for clients = happy clients = long-term success for the business.

## It upskills your team to make your firm digitally fluent

Being “digitally fluent” is imperative as client and lawyer expectations change in line with the digital evolution of the world beyond the law. Digital fluency is a currency in which the legal industry can and should be trading.

**Top-tier Australian Law firm Minter Ellison partnered with Josef** to achieve the following objectives: (1) drive profitable growth; (2) meet and exceed client needs and expectations; and (3) boost people satisfaction.

“The landscape our clients are operating in is more nuanced and layered than ever. There’s the expectation for commercial solutions and continued technical rigor, but also greater efficiency and accuracy. It’s precisely why digital fluency is so crucial. Without it, you’ll be left behind” says Naomi Hickey Humble, Head of Legal Operations (DCI) at Minter Ellison.



# What to automate?

## Legal “health checks” and maturity assessments

Legal “health checks” assess how well a company is doing in any given area, from general legal health, to compliance with a specific regulation. Maturity assessments are somewhat more sophisticated, as they tell the user not just what they can improve but how they can improve it.

For example, International law firm [Pinsent Masons used Josef](#) to build and launch a free interactive chatbot to measure an organization’s level of inclusion and diversity.

Leading [New Zealand firm Tompkins Wake digitized legal advice and guidance](#) around common issues by developing a digital “health check” product to give business owners the option of self-serving simple legal matters quickly, online and on-demand.

## Regulatory & Compliance Tools

Law firms can build tools to help customers answer regulatory questions, do regulatory work, or to train clients in how to comply with regulations.

When it comes to regulatory and compliance bots, Josef has helped firms build bots for unfair dismissal, long service leave guidance, anti money laundering, modern slavery and more.

Commercial Australian law firm, [Cowell Clarke automated modern slavery compliance training](#) with Josef by building a suite of bots for different clients, including suppliers and employers, across different sectors, from aged care, manufacturing, apparel, infrastructure to food. The bots have trained 300 people, and the feedback from clients has been overwhelmingly positive.

“It breaks down what can be a complex topic into something that a huge amount of people can understand,” said Special Counsel Emma Peters.

Another regulatory and compliance success was won by [Arent Fox](#) – a full service US firm – who utilized Josef to efficiently run a global audit. The firm used bots built with Josef to track all of the right metrics to present to the US State Department. A feat made much easier with automaton.

## Documents & Contracts

Document automation tools not only create internal efficiencies (hello increased margins) they can also be used to transform the client-experience and productize services, creating new revenue streams for firms.

For example, [leading international law firm Clifford Chance has used Josef to create Intelligent VIMA Solutions](#), a series of solutions that automate and generate documents based on the industry standard Venture Capital Investment Model Agreements (VIMA) suite.

Aren't sure what to automate first? Josef has helped firms with hundreds of contract and document bots including those for Independent Contractor Agreements, Lease Agreements, IP Assignment Deeds, Loan Agreements, MOAs, Power of Attorney, Series A Term Sheets, Shareholders Agreements and Website Terms (to name only a few!).

## Marketing and Business Development Tools

Business development (a.k.a finding new clients) is lengthy, time-consuming work that is often not reimbursed. If anything, it costs the firm money. Schmoozing ain't cheap!

Whilst digital tools can't take your clients out to lunch, they can speak to an infinite number of people, and then pass the right leads on to the right people in your firm.

Leading Australian law firm [Lander & Rogers created a defamation legal advice, intake & triage tool](#) which not only helps their clients but also generates leads.

“The bot generates and triages enquiries all at the same time, essentially guiding users to answer questions so that we retrieve the most relevant pieces of information possible... And it's bringing in actual traffic and generating leads too. Perhaps 3 or 4 a week!” says Partner, Scott Traeger.

## Workflow Automation Tools

By building workflow automation tools, firms can create internal efficiencies that allow lawyers to work smarter, not harder. Think about the multitude of administrative tasks that weigh down not just administrative staff, but lawyers themselves.

According to the [LexisNexis Bellwether Report](#), keeping working practices and systems up to date is the most significant threat to small law firms, with four-fifths of respondents (81%) listing it as a quite significant or very significant threat.

Using no-code automation, Josef can help firms streamline all manner of workflow automation tools including Costs Agreement bots, Engagement Letters bots, KYC (know your client) bots, Case management rack assistance bot and many more.

If you're interested in generating more time, more revenue and more satisfaction for your team, get in touch for a free demo of Josef. Because why spend time doing things a robot can handle for you?



## 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 a demo today.

[Book my demo](#)