Documents and contracts:

a practical guide to automating them.

Josef

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Documents sit at the center of what we do as lawyers. Contracts. Agreements. Letters. Deeds. Court documents. The list goes on.

Some of those documents are highly tailored, technical and strategic. Others, as we all know too well, are repetitive and sometimes downright boring. To automate these documents is to save time.

Just ask document automation specialist **Verity White, Josef super-user and Founder of Checklist Legal:**

> **"When tasks are automated, they generally take less time. And it means that you can spend that time doing something else, either [doing something] more relaxing, or more useful for the business,"**
>
> says Verity White, Founder of Checklist Legal

Similarly, global leader in HR services **Randstad** found the time that they saved through document automation invaluable. By automating just a handful of repetitive documents, they estimate hundreds of hours per year are saved for their legal team.

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.

The automation train has left the station, with the Association of Corporate Counsel's **2021 report on Legal Technology** showing that 77% of participants from 18 countries wanted technology to help them improve the contracting process. Get on board.

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 organisation. For example, think about the documents that your sales team uses – these are often repetitive but crucial.
- **Consider metrics.** Before you begin automating, think about the data you will collect from the tool you've built. You have the potential to analyse trends and really dig into the data of your business.

> **"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

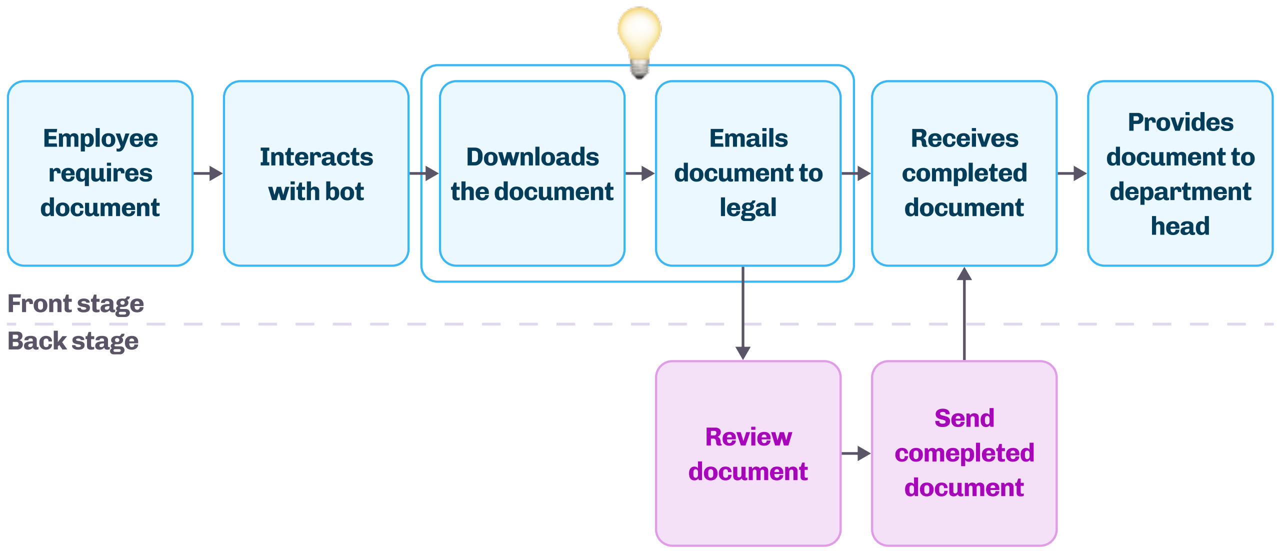
Preparation is key

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.

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 company. 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.

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." That is to say, user experience (or "UX" to the techies in the audience!) was front of mind for the toilet paper juggernaut.

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. Analyse 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 clients' first automation project is to create a streamlined self-service document automation tool. Clients 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**.

Spread the word!

Finally, you need to make sure that people can find and use the document automation tools that you build. Here are three key tips to making sure that you document automation tools deliver the value that they should:

1. **Meet your users where they are:** think about where your users currently look for legal help (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, that you keep getting feedback from users, and that you 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**.

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