



# Getting on Board with Document Automation: What to Expect

A guide to choosing the right document automation platform for your firm or legal department

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# Introduction

## A guide to choosing the right document automation platform for your organization


The legal profession – like many other industries today – is facing increasing pressure to deliver more for less, provide greater transparency, and [cultivate innovation](#), or risk losing out to more agile competitors.

Technology-enabled tools can help firms and legal departments of all sizes deal with this pressure by reducing time spent on routine tasks, which then allows for more focus on value-adding work.

Imagine cutting down the time it takes to assemble a fully compliant contract by up to 82 per cent<sup>1</sup>. Automating your organization's document management procedures is one – increasingly necessary – way to simplify processes and make cumbersome document creation a thing of the past.

It goes without saying that choosing the right platform can make all the difference when you're transitioning to an automated process – an ill-fitting solution or lack of engagement with a new tool can mean missing out on the many benefits this change can bring.

In this guide, we take you through the process of examining how your firm or legal department can benefit from a document automation platform, then by familiarizing you with the features commonly available in document automation platforms today.



"Although lawyers have traditionally been late adopters of technology, it is hard to imagine a Canadian legal profession of the future that has not embraced at least some technological development."

Professor Richard Susskind, OBE<sup>2</sup>

# 1. The problem with manual processes

Legal work can be synonymous with mountains of paperwork and manual processes, but there are a few obvious downsides to manual document assembly:

## It wastes time and money

Research from Thomson Reuters Legal Australia found that 2.3 billable hours are wasted per week per senior lawyer in a typical organization that still relies on manual processes for tasks like document assembly (based on three documents per week)<sup>3</sup>. In a world where the billable-hour model is quickly diminishing in favour of more value-adding fee structures, can your firm afford to waste money on such inefficiencies?

## It lacks consistency

Dealing with multiple different layouts and naming conventions can result in a lack of version control and uniformity when manually producing documents.

## It risks errors

Drafting documents manually means a risk of human error, mistakes that could be costly for your firm.




## 2. The benefits of document automation

Document automation means you avoid reinventing the wheel with each legal document, and all the risks that come with manual document production. Its many benefits include:

- Enhanced productivity and better margins
- Reduced risk of errors and improved client relationships (both internal and external)
- Freeing lawyers and senior-level resources to focus on higher value work
- Uniformity and consistency throughout all documents
- Improved continuity in passing on work to junior resources and empowering business professionals

If your firm or legal department is ready to get started with document automation, it's important to arm yourself with the right knowledge before jumping on board.

Clarifying your organization's expectations, needs, and goals around document automation, and getting familiar with what's available, is crucial in deciding which solution is right for your firm.



"The key value is efficiency – our lawyers can get to a **first draft quicker** and they are free to focus on more interesting and more valuable work."

Gail Swaffield, Director of Knowledge Management Systems, Clifford Chance (UK) Thomson Reuters Contract Express (UK) customer

### 3. Know what your organization wants from a document automation solution

**Document automation has many benefits but before thinking about purchasing document automation software, you need to consider what a 'document solution' really means for your organization, and what you expect from the platform you adopt.**

Deciding what problems you want to solve, what gaps you want to fill, and what goals you want to reach with a document automation solution is the first step in narrowing your selection from the wide range of options available today.

The size of your firm or legal department and its capacity to manage its own precedents will also be a factor driving your decision.

**Here are some other basic considerations:**

#### **Automating your in-house documents**

If your organization already has its own content library or knowledge management platform, you'll want to consider a platform that can integrate with and automate the documents, precedents, and forms you already have.

If you want to augment your existing collection, consider a system that has pre-automated documents that will seamlessly fit into your existing collection.

Automating documents and workflows can allow more efficient use of lawyers' time, opening up new areas of profitability and increasing margins.

It can also provide greater cost predictability for law firms and legal departments:

- Law firms can find greater predictability when entering into alternative fee arrangements, such as a fixed-fee billing structure
- Legal departments can manage budgets and reduce costs on each drafted document

#### **Improved document and matter management**

Version control becomes an issue when one document gets passed around various individuals for editing and approval. This often results in the duplication of information and bottlenecks in the document review process.

Consider a platform that allows you to store all documents relating to a particular client or matter in one place, which also allows for easier retrieval later.

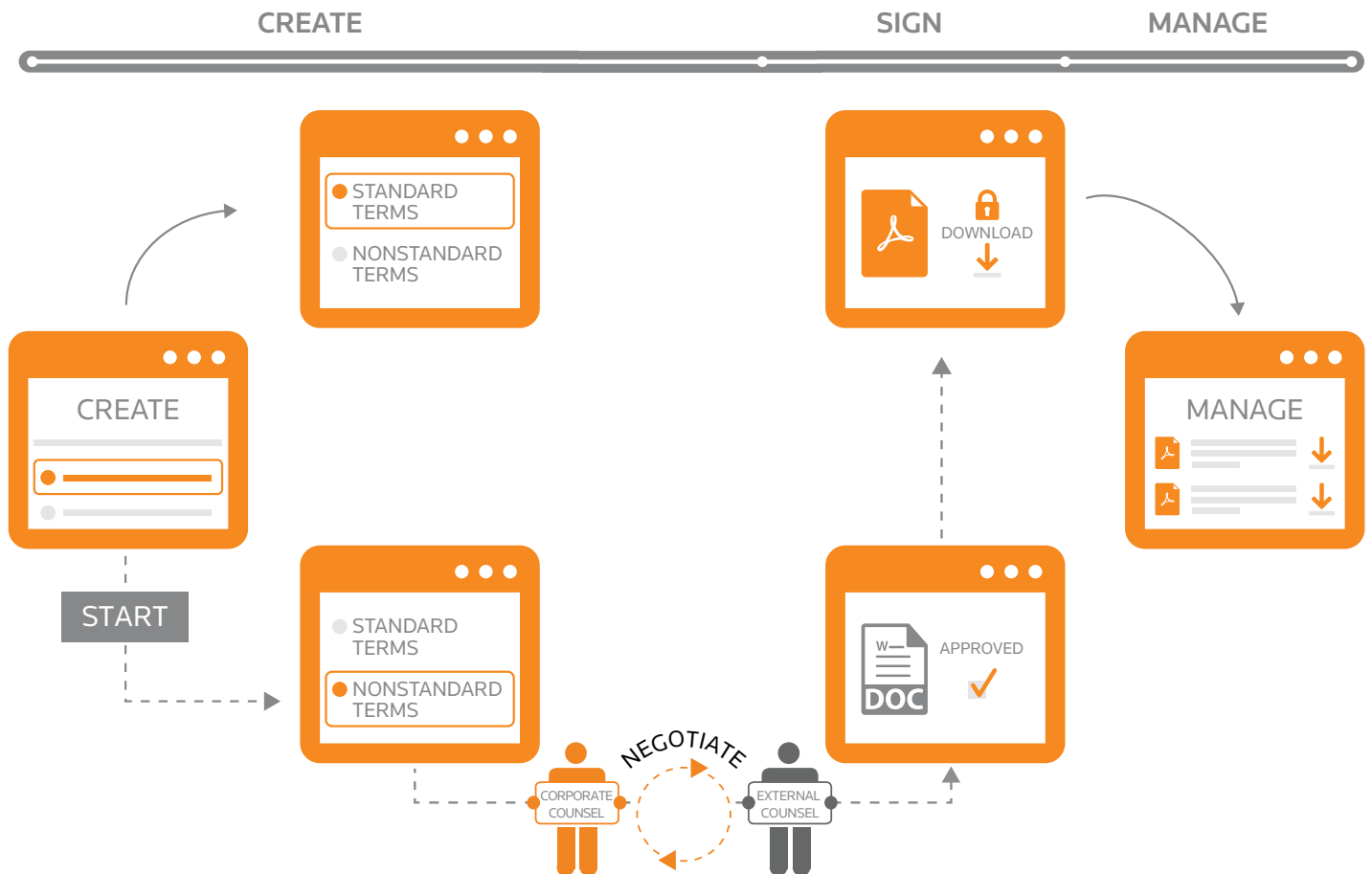
#### **Access to current and high-quality content**

If you don't have access to accurate, current precedents, you can risk unnecessary delays and costs when working on a matter. A document automation platform that can incorporate updates from changes in market practice saves your organization time and provides peace of mind when drafting complex documents.

### Self-service document creation

An extension of document automation is self-service document creation, which is an increasingly popular option. This allows business individuals outside of your legal department or your clients to participate in the contract creation process.

### Trusted self-service contract creation



## 4. Important features to consider if you're automating existing content

**If your organization wants to automate its own documents, such as a library of existing forms and precedents, here's what's important to consider in a solution:**

### **Stores information for later use**

A document automation platform that stores important data (such as addresses, special terms, or contact numbers) means greater efficiency in creating future documents. It also means you can reduce errors and save time on duplicating entries later.

### **Caters to self-service use**

If part of your offering includes a self-service element for clients or third parties, consider whether your document automation system provider can accommodate this.

### **Looks and feels easy to use**

First impressions are important when it comes to introducing technological change among a large group of people. A document automation tool that is easy to understand and doesn't require a large amount of technical skill to navigate will get more engagement and prompt buy-in from users.

### **Builds in an approval process**

Document production bottlenecks in law firms and legal departments are often the result of lengthy, confusing approval processes. A platform that lets you build governance and workflow into your document creation cycle means a streamlined approval process that translates to a better use of time and/or billable hours. It also means senior lawyers can confidently delegate work to juniors.

"Aside from automating repetitive tasks, [document automation] takes things a step further to derive answers to contextual questions – a reality that makes it particularly handy for contractual reviews. By virtue of tech like this, lawyers now get more time to focus on more productive aspects of legal work."

Forbes<sup>4</sup>



## 5. Important features to consider in a document automation platform with access to up-to-date precedents

If you want a solution that includes a library of precedents, consider these essentials in a document automation platform:

### High-quality forms and precedents that are always up to date

To provide the most accurate client service and do their jobs well, lawyers depend on access to updated forms, precedents, and legislative changes. A platform that automatically updates its library of precedents according to legislative or case law updates will ensure that it takes less time to produce accurate documents. This comes in handy, especially during busy periods.

### Something intuitive and easy to implement

A platform that is easy to learn and seamless to use means you're more likely to get the buy-in required for success and start getting a return on your investment straight away. A platform that doesn't require complex technical skills to operate ([although that is the responsibility of some firms today](#)) and can easily be configured with limited IT assistance is more likely to be adopted firm-wide than one that is difficult to use. Also, a solution that lets you access and use existing technology solutions (say, on Microsoft Word) will save you time.

### A solution that works with the software you already use

A document automation platform that integrates with your existing systems (such as practice management, legal guidance and know-how, document management, and online research software systems) can help you save time by pre-populating data, further streamlining workflow and eliminating double-ups on certain tasks.

## Conclusion

### Know what you want to achieve

By understanding what your organization wants to achieve with document automation and then matching this knowledge against the features of document automation software packages on offer, you're better equipped to find the right solution for your firm or legal department and maximize the many benefits of automation.

### Did you know?

By automating your processes, you could **save up to 82 per cent<sup>1</sup>** of the time you spend on document production.

## References

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## Thomson Reuters document automation solutions

Successful law firms turn to technology to reduce inefficiencies and boost profitability.



### Contract Express

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[Find out more >](#)



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[Find out more >](#)

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