

Document Automation: A Balance of Trial and Error





Document Automation

A Balance of Trial and Error

It's a brave new day for law firms. As noted by [Law.com](#), we've entered the era of change-makers. Lawyers have a relentless focus on growth but also understand that success requires more than revenue generation in the long-term.

That said, change-makers can't drive law firm growth in isolation. According to a recent [PWC study](#), 100 percent of top-10 legal firms now recognize the challenge and opportunity presented by new technologies to help drive industry change.

The biggest challenge law firms are trying to solve? Operational efficiency.

As noted by The [2019 Aderant Business of Law and Legal Technology Survey](#), 31 percent of firms cite improved operations as their number one priority. The easiest route to enhanced efficiency and reduced redundancy is to use document automation to reduce potential error and deliver key trial data securely and on-demand. Let's take a look at current document challenges, historic document solutions, and the case for new automation options.

31% of law firms cite improved operations as their number one priority.



In this guide, we will explore:
Errors and Oversights | Document Automation Basics
Historical Precedents | Automation Evolution | Making the Case

Errors and Oversights

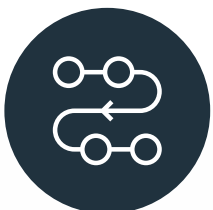
The legal industry faces unique document challenges fueled by two opposing forces. This includes the need for speed to handle rapidly-increasing document volumes as digital information sources create massive data sets, and the need for clarity as eDiscovery, compliance, and document auditing rules become more comprehensive. Specifically, law firms cite [three top document management frustrations](#):

The Top Three Document Management Frustrations:



High Expectations

Accuracy and on-demand delivery are the new industry watchwords; successful client relationships and case trial operations require clear, concise, and error-free documents at speed. Manual entry of multiple form types and versions naturally slows document completion and increases error rates, putting both trial outcomes and client relationships at risk.



Internal Clarity

How are documents stored? Where are they stored? How do staff access them, and what happens when an eDiscovery request occurs? Even accidental oversight, such as documents filed, dated, or described incorrectly can reduce efficiency and slow case resolutions.



Compliance Requirements

As noted above, compliance regulations such as GDPR now pose key challenges for law firms. Clients have the “right to be forgotten” and must consent to any data collection. Failure to comply could result in significant monetary fines.



Even accidental oversight, such as documents filed, dated, or described incorrectly can reduce efficiency and slow case resolutions.



Document Automation Basics

Automation. It's a deceptively simple term, but what does it mean in practice? Teams of robot lawyers winning cases and celebrating with cases of motor oil? AI-driven processes capable of delivering closing arguments worthy of a movie montage? Not quite. Put simply, document automation is the process of streamlining specific document tasks that are better handled by software tools and computer rules than human beings. Broadly speaking, legal document automation includes [four key categories](#):

1

Capture and Organize

Firms need a way to quickly capture and organize documents as they are created or discovered on their network.

2

Review and Collaborate

Lawyers must be able to collectively review, edit, redact, and annotate documents on-demand.

3

Workflow Approval

Automation tools help streamline key workflows and reduce approval timelines to ensure both eDiscovery and court requests are met ASAP.

4

Publish and Share

Law practices require the ability to securely publish and share key documents without the risk of revealing sensitive data.



Document automation is the process of streamlining specific document tasks that are better handled by software

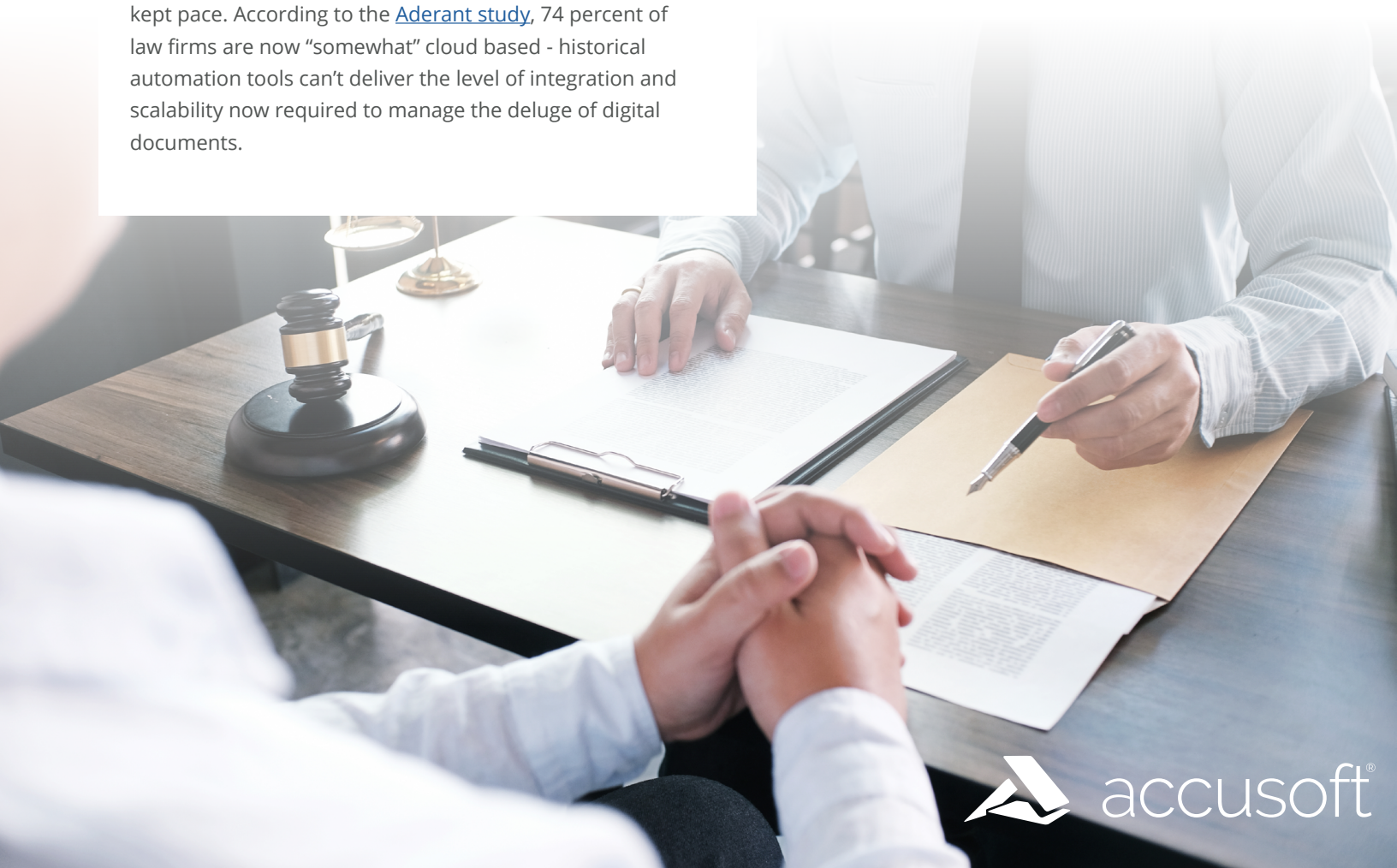
Historical Precedent

For many law firms, the concept of legal document automation seems like a bridge too far. Considering the increasing competition for legal job opportunities combined with the long hours worked and massive stress borne by lawyers, many worry about the impact of automation on their careers. After all, there's an inherent humanity to law practice, like the need for out-of-the-box thinking and the ability to translate highly technical legal jargon into actionable and applicable outcomes.

In fact, document automation has been part of law practice at large since the late 1970s when firms realized their ability to manually handle incoming documents was eclipsed by the speed and complexity of new forms and file types. The result? Many practices developed in-house software tools capable of sorting and classifying key documents as they arrived.

However, as IT infrastructure evolved, the tools haven't kept pace. According to the [Aderant study](#), 74 percent of law firms are now "somewhat" cloud based - historical automation tools can't deliver the level of integration and scalability now required to manage the deluge of digital documents.

74% of law firms are now "somewhat" cloud based



Automation Evolution

What does legal document automation look [like in practice](#)? It starts with customization, including the ability to create customized forms and contracts that can be easily modified by staff and stakeholders alike. Customization is key to improved workflows since it allows firms to create critical templates and then modify them for specific uses, significantly reducing the need for manual form generation.

Next-generation tools are also capable of intelligently identifying document types to ensure they're filed and categorized correctly. This allows firms to streamline both document security and compliance without sacrificing productivity. Finally, document automation tools empower collaboration, allowing lawyers to easily edit, compare, and redact key documents before they're released for eDiscovery requests or filed for trial.

The biggest difference between these new tools and historical in-house incarnations? Integration. Here, firms have two options. The first is a software-as-a-service (SaaS) solution that works in tandem with public and private clouds to deliver on-demand functionality. SaaS tools favor ease-of-use over customization, but provide a streamlined path to improved integration.

Law firms can also leverage advanced software development kits (SDKs) and application programming interfaces (APIs) that easily integrate new solutions into existing applications. Instead of using out-of-the-box features or completely rewriting current processes, SDKs and APIs let organizations add critical functionality on-demand.



Making the Case

Improved compliance. Enhanced integration. Streamlined security. These are all critical advantages of document automation, but how do firms make the case for day-to-day attorney operations? Direct benefits include:



Reduced Workflow Complexity

Lawyers can simply call up document templates, enter data, redact critical information, or modify forms on-demand and then get back to building their case.



Easy Onboarding

Straightforward document creation and management tools make it easy to onboard new associates, empowering them to complete critical data intake tasks and collaborate on key forms.



Practice Growth

If lawyers spend all their time struggling with documents they're not driving company growth, they're maintaining the status quo. Document automation lets lawyers get back to what they do best.

Operational efficiency is critical for law firm growth, but it won't happen without improved document automation. Curious about the next phase of legal document automation? Check out part two of our document automation series, *Body of Evidence*

“

Operational efficiency is critical for law firm growth, but it won't happen without improved document automation.

”



accusoft



www.accusoft.com

