

# Legal Document Automation: Substantiative Evidence





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Improved digital strategies are [top-of-mind for legal firms](#) as they look to capture increasingly tech-savvy clients, stand out from the competition, and leverage the expanding impact of industry-disrupting big data. However, the biggest barrier to this tech-first transition is outdated, outmoded, and ineffective document automation processes.

According to a [recent report](#), data-entry defects, extra document copies, and delays in information accessibility are killing law firms. Let's highlight four pieces of substantive evidence to help organizations reduce total risk, boost overall efficiency, streamline version control, and enhance client relationships.

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In this guide, we will explore:  
Historical Precedents | Risk Mitigation  
Efficiency Gains | Version Control | Enhanced Relationships

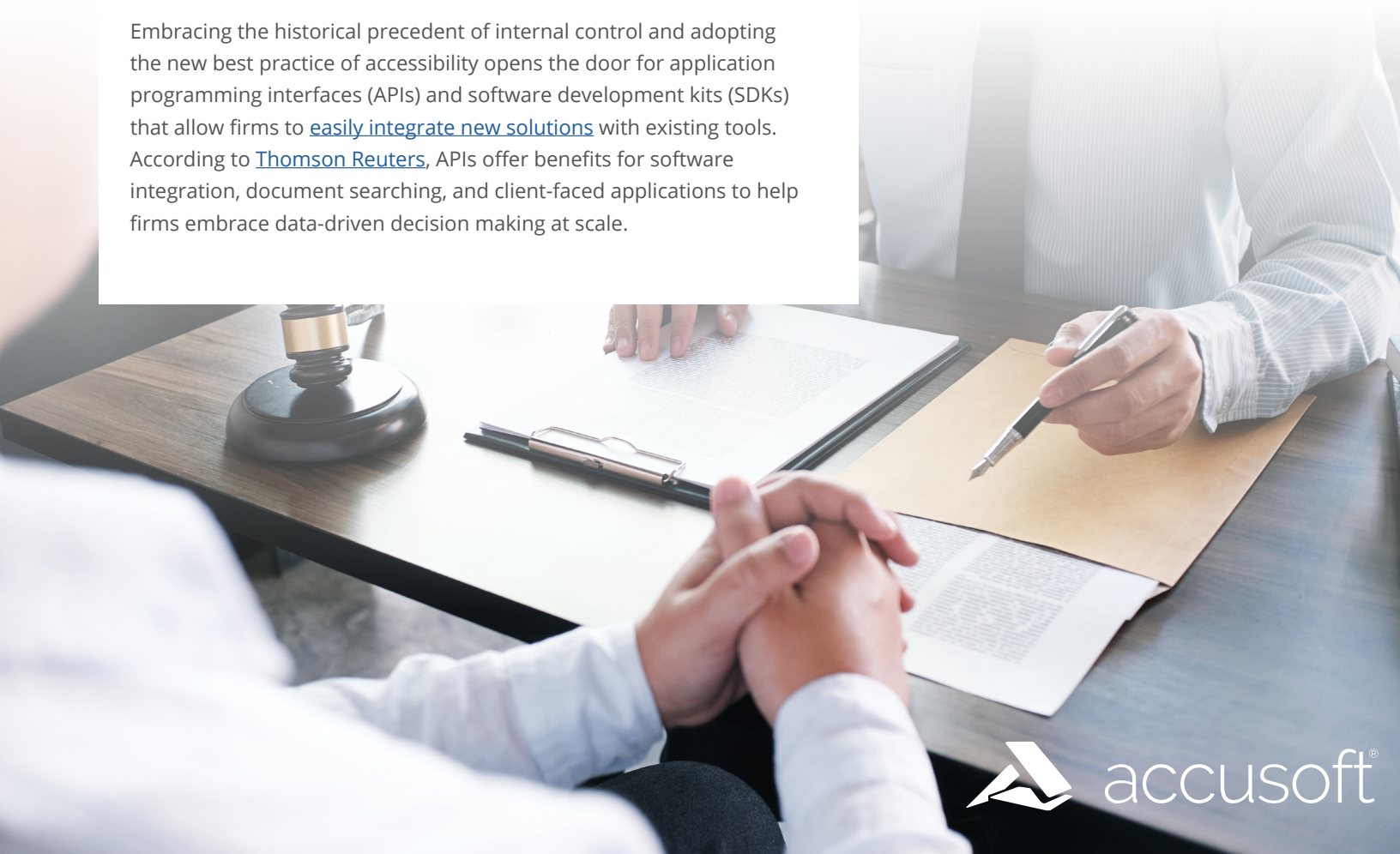
# Historical Precedent

Document management has been [historically neglected by legal firms](#). This stems partly from a reliance on physical documents and familiar procedures that limit the potential of outside discovery or accidental release. As ediscovery requirements become commonplace and clients bring a wide variety of digital-format evidence to the table, historic processes can't keep up. Think about all the types of evidence now available. From audio and video files to screenshots and complex electronic documents, there are a variety of formats to sift through in order to document evidence efficiently.

To bridge the gap, many firms created custom-built, in-house document handling tools capable of getting the job done, but lacking the interconnectivity and interoperability necessary to meet the evolving expectations of tech-savvy clients. Now, law firms must engage with both their own clientele and attorneys from other firms through both cloud-based portals and mobile applications. With this process, documents are often left behind as firms struggle to adopt new technologies and lack the time and resources to develop and deploy document automation at scale.

Embracing the historical precedent of internal control and adopting the new best practice of accessibility opens the door for application programming interfaces (APIs) and software development kits (SDKs) that allow firms to [easily integrate new solutions](#) with existing tools. According to [Thomson Reuters](#), APIs offer benefits for software integration, document searching, and client-faced applications to help firms embrace data-driven decision making at scale.

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# Risk Mitigation: Sealing the Deal

Sealing court documents boosts process protection because critical data is defended from outside influence or observation. Law firms are now under increasing pressure to ensure internal documents are similarly secured on-site, redacted as required, and ready for eDiscovery without the risk of accidentally communicating more than intended.

Document automation tools offer dual benefits for risk mitigation:



## Streamlining Data Entry

Humans make mistakes every day, and that's no different during something as monotonous as data entry. In fact, humans tend to make more mistakes if entry tasks are detailed and repetitive. According to a recent study on human error rates, mistakes are often hard to detect since just 0.06% "were blank or outside of the allowable range for the variables." Automation tools like Accusoft's [OnTask](#) ensure accurate data collection that sidesteps human error.



## Redacting Key Documents

Redaction is critical to security, but often poorly or hastily done, making it possible for recipients to discover sensitive data. Document viewing tools like PrizmDoc™ Viewer enable you to [burn-in redactions](#) and enable your team to help safeguard data both on and off-site.

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# Efficiency Gains: Boosting Billable Hours

With [60 percent of firms saying they struggle with internal efficiency](#), wasted time is a top concern for legal organizations. As market competition heats up, there's a shift underway. Clients no longer accept "black box" explanations for billable hours. Instead, they want to know what's happening, when it's happening, how specific tasks will be completed, and what it's all going to cost. Vague assurances and legalese won't cut it here. Tech-savvy clientele want to know exactly what they're paying for.

As a result, firms need structured form solutions capable of scanning, enhancing, identifying, and extracting data from documents of any type. From optical and intelligent character recognition to reliable form cleanup, tools capable of [streamlining forms at every step of the legal process](#) can save lawyers time and provide the critical transparency required to boost client confidence.

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# Version Control: Order and the Court

Standardization matters. If document versions don't match across current court proceedings, in-house data storage, and client records, the best case scenario is that you wasted time. Worst case? Your entire court effort gets derailed.

Solving this problem demands a combination of collaborative and version-control tools. Documents must be easily shareable across users with the right permissions. File type and structure should be no barrier to making

edits, adding comments, or writing notes, but firms also need document management tools that accurately record all changes made and ensure the most current document version is available to all approved users.

Deploying review and collaboration tools at scale can help [deliver document compliance — and confidentiality — without compromise.](#)



# Enhanced Relationships: The Attorney/Client Advantage

As noted by [Lawyer Monthly](#), generating new business is now a top priority for law firms. It makes sense; digital democratization has narrowed the gap between established and startup firms, in turn boosting client expectations when it comes to efficiency, transparency, and agility.

In practice, this means firms can't afford to keep clients waiting with cumbersome paper processes or ask them to submit physical or faxed copies of all critical documents. Legal organizations need integrated document management solutions that allow clients to document evidence in any file type or easily fill out forms

online and provide eSignatures that are both legally binding and secure.

Ultimately, the new legal landscape comes down to a question of time and money. Will your firm or the competition make better use of a clients' time and earn their money? Evidence drives legal decisions, and informs the need for next-generation document management and automation tools. Historic processes can no longer safeguard data or align with client expectations. Firms need solutions capable of mitigating risk, boosting efficiency, improving document control, and enhancing the client experience.





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