

Legal Document Automation:
The Final Verdict



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The legal document management and automation landscape is evolving. Fuelled by new technologies and driven by in-situ document discovery, security, and quality challenges, firms need to streamline document processes without negatively impacting court outcomes or compromising the attorney/client privilege.

Check out the first two parts of our eGuide — [Trial and Error](#) and [Substantive Evidence](#) — to get caught up on the casework. On the docket today? Our final verdict. Is it better to buy or build the document services you need? Let's dive in.



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IN THIS GUIDE, WE WILL EXPLORE:

- Double Jeopardy — People & Processes
- Legal Eagles — Rise of the Machines
- Direct Questioning — Backing the “Buy” Argument
- Cross Examination — Bolstering the “Build” Argument



Double Jeopardy — People and Process

As noted by [Big Law Business](#), the legal industry is slow to change. Even as healthcare companies, financial institutions, and government agencies make the move to automated, integrated technologies, many law firms have doubled down on paper-based legacy processes to locate court documents, complete forms, and draft contracts.

But beyond legal borders, clients are rapidly adopting cloud-based technologies such as document e-signing, form auto-filling, and keyword-driven document discovery. As a result, lawyers now face the double jeopardy of people and processes. Clients aren't willing to pay more for services that can't keep pace with other industries, while existing processes can expose firms to potential compliance challenges and eDiscovery audits. Making matters worse? Without a unified document solution, lawyers are forced to use multiple applications across multiple platforms, both increasing the risk of error and reducing total productivity.

While manual processes may be familiar, they create a trio of troubles for lawyers:



STRUCTURE

60 percent of law firms say they [struggle with efficiency](#) due to lacking internal structures around document collection, storage, and collaboration.



SECURITY

Legacy processes make it [difficult to annotate, redact, and encrypt documents at scale](#), increasing the risk of compliance challenges.



STANDARDIZATION

Clients and courts expect consistency across document types and access; fragmented data collection, contract creation, and content management can reduce client satisfaction.

Document management solutions from Accusoft such as [OnTask](#) and [PrizmDoc™ Suite](#) can help centralize document operations to satisfy both people and processes.

Legal Eagles — Rise of the Machines

The evidence is clear. Document automation processes [improve outcomes](#), including improved security, simplified collaboration, enhanced accuracy, and reduced waste. These improvements aren't incremental. As noted by [Inc.](#), a recent study found that when 20 of the country's top lawyers took on an AI system designed to spot flaws in nondisclosure agreements (NDAs), there was a clear winner. While it took lawyers an average of 92 minutes to find NDA flaws with 85 percent accuracy, the AI alternative delivered 94 percent accuracy in just 26 seconds.

The good news for lawyers? This isn't a "replace" scenario. Instead, new technologies will help redefine current jobs. According to [Forbes](#), while new technologies display strengths in error detection, contract template design and document creation that people can't match, the human ability to combine logic and emotion to create compelling arguments makes attorney skills invaluable.

With legal industry job opportunities [growing at a consistent rate](#) and predicted to remain consistent over the next decade as the market expands, there's an easy verdict here. Law firms need document management tools capable of aligning best practices with 21st-century expectations.

[But a critical question remains](#): Is it better to buy and implement complete automation solutions, or build in white-labeled solutions that work inside existing apps?



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Direct Questioning — Backing the “Buy” Argument

What’s the current state of your case files? Are your contract templates standardized and easily accessible, or created on-demand for each new negotiation? If your firm is just getting started with document automation, it’s worth considering a solution like OnTask. In this case, there’s more substantive evidence for buying than building, since you’re not dealing with pre-existing management solutions that might conflict with new deployments.

Implementing bundled, buy-in solutions like OnTask can help streamline key processes including:

1

DOCUMENT COMPLETION

With drag and drop data routing, users can easily create legally binding contracts, route new data to specific documents, send documents for approval, and allow all parties to sign with digital signatures.

2

CUSTOMIZED TEMPLATES

OnTask empowers your team to create customized document templates and manage them section-by-section. Have one contract that needs an escalation clause? Add it. Need the same contract for another client without that clause? Easily turn it off and repurpose the document instead of redoing the work.

3

END-TO-END SUPPORT

Build better dockets with two-way communication support. Facilitate negotiation with automatically updated documents and version control, and prioritize key tasks with built-in data redlining and notification tools.

4

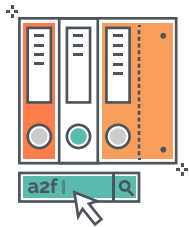
LONG-TERM STORAGE AND SECURITY

Data can be stored with OnTask up to six years for eDiscovery requests. Law firms can also set destruction dates for contracts, templates, or case files to meet compliance expectations.

Cross Examination — Bolstering the “Build” Argument

If your firm already uses a document management solution to help streamline key processes, it's worth considering automation SDKs and APIs that integrate with existing applications to enhance overall functionality. Accusoft offers zero-footprint solutions for document viewing, conversion, and assembly that leverage REST APIs and advanced HTML controls to deliver on-demand document view, search, redact, print, and download capabilities across a host of file formats.

Choosing to build-in document creation and viewing tools can help tackle key legal tasks including:



DOCUMENT ASSEMBLY

Law firms are often responsible for the creation and management of multi-part, multi-stage contracts between complex business entities. Accusoft's [PrizmDoc Editor](#) enables users to identify and assemble sections of pre-existing text into new, editable content. This is extremely useful in contract management, where users can insert commonly used text, like contract clauses, to reduce time and improve quality when generating transactional documents at scale. PrizmDoc Editor securely integrates with existing applications to provide in-browser support, letting lawyers [assemble assets](#) quickly and accurately from the safety of their own legal application.



CASE MANAGEMENT

Law firms and legal departments can simplify the way they perform case reviews by integrating data capture, file conversion, and OCR into their legal application. With [ImageGear](#), users can convert multiple file types into a PDF/A document to consolidate data and easily search for information. This helps lawyers easily tag documents with client numbers, names, and other identifying information for quick search and sorting. PDF/A conversion also helps lawyers stay [federally compliant](#) in court. ImageGear makes it easy for lawyers to access case data in multiple formats without having to download multiple files and open third party applications. Avoid a potential compromise of security and search for case files all in one place.



eDISCOVERY REQUESTS

The rapid uptake of digital documents by governments, enterprises, and individual clients has changed the way law firms discover and process key evidence. Today, eDiscovery is essential to both streamline case completion and protect client interests. When conducting [eDiscovery efforts](#), firms need solutions that deliver broad file format support and full-text search to streamline and simplify the process. It's also critical to protect key documents with redaction and digital rights management (DRM) tools that ensure any resources provided meet legal requirements without risking client privacy. [PrizmDoc Viewer](#) meets these needs and more. Its expandable and scalable annotation feature makes it easy to collaborate, proofread, review, and add comments to case files all in one place. It is an end-to-end eDiscovery toolkit that also includes whitelabeling support, making it easy to integrate key contextual branding cues and bolster client confidence.

Judgement Call

In the case of legacy versus leading edge, the jury is back. They've considered the evidence, examined the facts, and reached a final verdict. Legal document automation isn't optional to succeed in a digital-first, data-driven world. When it comes to build versus buy, meanwhile, the jury's still out. What works best for your firm depends on your current document delivery and development system, how it impacts docket creation, and where new tools will best serve legal decision making.

Just getting started? Consider software-as-a-service (SaaS) solutions like [OnTask](#) to boost productivity and enhance functionality. Need better integration? The [PrizmDoc Suite](#) makes it easy to improve security and deliver document services on-demand.

Accusoft is a software development company specializing in content processing, conversion, and automation. Need to leverage legal automation and deliver on document management expectations? There's an [Accusoft solution](#) that can help.



