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AUTOMATE YOUR EXPERTISE! WHERE TO BEGIN

How to Successfully Tackle Repetitive Tasks with
Document and Workflow Automation

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Modern automation solutions are making it easier than ever to translate legal, business, and client expertise into workflows, document templates, and apps to support mission-critical processes. This reduces the time spent on high-volume, low-complexity tasks and, as the American Bar Association notes, “Manual processes can never be as efficient as automation at simple, repetitive tasks.”¹

Legal professionals have been increasingly finding new and improved ways to automate their workflows and processes, but it can be daunting to know where to begin. This guide is here to help you visualize common challenges being addressed by automation, identify a technology solution that will grow with you, develop a plan for getting started, and empower your people to automate their expertise and focus more time on higher-value work.

CONTENTS

- ❑ **Not All Automation is the Same**
- ❑ **Using Automation to Solve Your Document and Workflow Challenges**
- ❑ **What Should You Automate First?**
- ❑ **Getting Started with Early Successes**
- ❑ **The Power of Combining Document Automation with Your DMS**
- ❑ **Your Expertise — Everywhere**



NOT ALL AUTOMATION IS THE SAME

Automation refers to using technology to execute tasks, processes, and workflows — either in part or in their entirety — minimizing the need for human input. Tedious, labor-intensive processes such as data entry, information or service intake requests, bulk document creation, and document review are just some of the manual tasks that can be reduced from daily workloads thanks to innovative automation technology.

Gartner predicts that corporate legal departments alone will have automated 50% of all their legal work related to major corporate transactions by 2024.² Unfortunately, many legal professionals, including those in law firms of all sizes and the private sector, are still behind the curve because they don't know where to start.

While many technology vendors say they have “automation,” automation tools can take many different forms, with varying degrees of usefulness for the rigors of legal work. Understanding what to look for can help you intelligently choose the solution that is right for you. Here are some initial things to consider:

Which features and functions are included? Get a complete review of everything the solution provides, as well as how it integrates with your existing processes, systems, and technologies. You might look for easy low-code deployment and maintenance, form and template creation via Microsoft Word and Adobe PDF integration, and complex document and workflow automation with task assignment and approvals.

What gets automated? The technology you choose should be able to automate the tasks and processes that are especially important for your work, such as document creation, automated form fills, workflows, approvals, etc.

How is the automation made available? Does your chosen solution streamline internal tasks only, or can external processes such as client signatures, work intake requests, or forms also be automated? Look for a solution that gives you options for how to deliver an automation to the people who need to use it. Also, be sure to find out if any resulting documents will be made available in Word, PDF, or — preferably — both.

How secure is your data? Because of the sensitive nature of the documents and communications you're entrusted with, security and governance capabilities are critical elements to consider when researching both the internal- and external-facing features of any solution.

How robust are the logic capabilities? Not all automation platforms have the robust logic capabilities required by legal professionals. Or when they do, they can be difficult to figure out and use. For example, legal document automation requires looping as a core capability so that multiple items (children, properties, etc.) can be included. It should also enable conditional logic and nesting of items to support complex legal work. Dig deep into these capabilities to ensure your specific needs are supported.



USING AUTOMATION TO SOLVE YOUR DOCUMENT AND WORKFLOW CHALLENGES

Regardless of your practice or focus, all legal work consists of a variety of repetitive processes to create a high volume of documents, such as contracts, agreements, applications, opinions, pleadings, and more — which must all be compliant, consistent, and accurate.

The amount of time involved in doing even simple manual tasks can put an immense amount of pressure on your workforce, especially for growing firms looking to increase their client base and legal departments trying to keep pace with the demands of business. In a Gartner survey, 68% of corporate lawyers said they struggled to manage their workloads in 2020. In 2021, over half reported some degree of exhaustion.³

Automation technology can help by significantly reducing repetitive work, allowing you to **expedite intake motions and workflows, accelerate growth, and increase both the volume and value of the service you deliver to your clients and business stakeholders**. And time saved on mundane tasks can free up your team to apply their expertise to more specialized, higher-value work. This also gives the advantage of being able to serve clients and attract new business more efficiently, which can make a huge difference in a competitive space.

For a clearer picture of how small to midsize law firms, large law firms, corporate legal departments, and the public sector are overcoming common challenges using automation, here are some real-world examples.



WHICH OF THESE CHALLENGES ARE YOU FACING?

Challenge: Creating High Volumes of Documents

By automating the production of legal documents through smart templates, you can increase efficiency, reduce errors, and eliminate the need to manually fill out repetitive information across multiple documents and formats using the time-consuming and error-prone “find and replace” method.

Large Law M&A Practice Group – Term Sheet Intake and Deal Document Generation: Create a term sheet intake application and use those inputs to populate your M&A documents automatically. This gives you a head start on the process, decreases the time it takes to create each document, and reduces the potential for errors.

Corporate Legal Department – Lawsuit Responses: Before automation, corporate lawyers served with lawsuits would have had to manually create a workspace and generate responsive pleadings to ensure each case was handled properly and responded to in a timely manner. An automated intake workflow ensures no steps are missed, case workspaces are created, and responsive pleadings are generated — while giving staff more time to spend responding to the lawsuit versus doing administrative work.

Challenge: Drowning in Work Requests Via Email

Automation technology helps you reign in the chaos of email-based work intake by intelligently managing requests.

Consumer Bankruptcy Firm/Practitioner – Client Intake and Document Generation: As a busy bankruptcy lawyer, you handle a high volume of consumer bankruptcies. By automating the client intake and document generation process, not only can you handle more work with a small staff, but you can also have more time for a healthy work-life balance.

Corporate Legal Department – Request Intake: As a corporate legal department, you spend too much time managing requests for issue evaluation, document review or creation, or myriad other work that comes in every day, usually via email. It's cumbersome, ineffective, and a nightmare to manage in Outlook. Automate your intake to create improved workflows and streamline incoming requests, saving hours per week so you can spend more time being responsive to the needs of the business.

Challenge: Needing Self-Service for Intake Processes

Automating intake processes ensures that no steps are missed, that responsive document templates are automatically generated, and that all relevant information is exactly where it should be.

Solo/Small Firm – New Client Intake: Small firms are in a competitive space and clients have a lot of choices when it comes to hiring a lawyer. The speed at which you can turn an inquiry into an engagement is critical to winning new business. To do this, you can automate new matter intake via your website, an email, or an iPad for in-person consultations, and then automatically flow that information into an engagement letter and other documents that can be delivered to the client for electronic signature quickly. Beyond saving time, this helps demonstrate the responsiveness that helps turn prospects into paying clients.

Law Firm Leader – Administrative Functions: Administrative staff in HR, Accounting, IT, and other departments spend a lot of time collecting information for the various services they provide to the firm. Automating those solutions allows staff and lawyers to fill out online forms that automatically submit service requests or complete forms in either Word or PDF format. With the ability to gather both information and electronic signatures and then automatically store the completed documents in your DMS, you can save countless hours and be more responsive to other complicated requests while keeping confidential documents and information safe.

Corporate Legal Department – NDA Generation: Your department is drowning in requests for simple non-disclosure agreements needed every time someone wants to share proprietary information with any number of external parties across the business. Tracking these requests and generating the NDAs can be a nightmare. With automation, you can build a self-service site for anyone across the business to use to submit their information and have the necessary documents generated for review by the legal department. In most cases, you can simply send the document for signature, but having all the documents and information in one place allows you to easily track requests and perform closer reviews on the rare occasion that is needed. Business stakeholders will love the quick turnaround and your legal team will appreciate the opportunity to use their time in other valuable ways.

Challenge: Responding Quickly to Custom Requests

With most legal work, timing is everything. Automating quick responses to custom client or stakeholder requests, document signing processes, and other standard back-and-forth processes shows your clients and business stakeholders you're responsive and care about handling their needs in a timely fashion.

Construction Lawyer – Lien Filings: A big part of your practice is filing liens for contractors when their customers don't pay. This is very deadline-driven and usually last-minute work. Now you can create an automated intake site for clients to enter their information which then flows through to generate the filing, send it to the client for signature, and then return it for filing. Not only does this save time, but clients will also trust you to be hyper-responsive.

Challenge: Staying Ahead of the Competitive Curve

With the amount of competition in the legal field, your level of efficiency and communication can mean all the difference when it comes to winning new business. Not only that, clients expect their dealings with you to be as easy and technology-enabled as their other consumer experiences. Automating the creation of documents that can be passed to clients for electronic signature can save administrative time and effort, as well as show clients how fast, attentive, and technologically advanced your firm is.

Real Estate Firm/Practitioner – Accurate and Timely Document Creation: As a real estate lawyer, getting the exact information entered into closing documents is critical. One wrong detail can have big consequences. With lots of moving parts and last-minute changes, being able to automate the entry of that data into closing documents – and ensure every T is crossed and I dotted – helps streamline the closing process, making it easier for you and staff to worry about getting transactions closed on time.

Law Firm Leader – Overall Benefits: Delivering superior service and value is the core of your firm's strategy. Translating your partners' expertise into automation can relieve partners from some of the day-to-day hand-holding that historically may have been required. It also enables firms to push more work to junior lawyers with confidence and reduces the amount of effort collectively spent on lower-value work so they can focus more on client engagement.

Challenge: Increasing Efficiency to Keep Costs Down

Especially useful for boutique and smaller firms that offer fixed rates for legal services rather than charging hourly, the ability to save time creating documents is critical to keeping the hours worked within the scope of your pricing structure. Automation can help you quickly generate the documents included in a fixed-price package.

Boutique Firm – Document Generation: In a boutique family law and estate planning firm, you offer fixed rates for estate planning based on the complexity of the estate and the size of the package (i.e., the difference between a newly married couple who just wants wills vs. a large estate with wills, trusts, advanced medical directives, etc.).

For the family law side of the practice, an automation can use intake information and input details directly into both your documents and court-required forms, freeing you up for the negotiations and emotional support clients need. The time gained from automatically generating most if not all the documents included in these packages saves time, leads to better outcomes and less stress for clients, and helps keep your business profitable.

Challenge: Modernizing for Improved Customer Experience

In an increasingly paperless world, automating your forms and intake processes not only saves you time and storage space, but also shows your clients and business stakeholders that you're ahead of technological trends, earning you confidence as a valued partner and potentially a competitive advantage.

Attorney General's Office/Government Agency – Opinion Letters: As a lawyer in the attorney general's office, you are inundated with opinion letter requests to clarify laws under your jurisdiction. These requests can arrive by mail or email, and each one requires setup, assignment, research, and a response within a specific time period. Being able to provide an intake portal that creates the workspace and uses the intake data to create responsive, error-free template documents can streamline this repetitive process and ensure you maintain a positive public reputation.

Corporate Firm/Practitioner – Business Entity Creation: Establishing a new business entity is a highly prescriptive and form-based process. One way to differentiate your practice is by automating the entity formation documents so you can spend more time in an advisory role with your new business owner and entrepreneur clients. If your goal is to be the "outside inside counsel" for small businesses in your area, build your book of future business by delivering high-value consultation, not just efficient form filing.

State/Federal Government – FOIA Responses: As a government attorney, your agency is inundated with Freedom of Information Act (FOIA) requests from citizens and journalists received by mail, email, or fax. Now you can have an automated intake portal that turns inputted data into responsive template documents, which modernizes the highly repetitive intake process and results in error-free work, which is crucial to your public reputation.

Challenge: Freeing Up Time for Higher Value Work

Your clients, colleagues, and stakeholders are relying on (and paying) you for your legal expertise, not for how many documents you can generate. This applies especially to firms with hourly billing, where valuable time and energy is wasted on administrative tasks rather than consulting and legal work. Automating most or all of the document creation process frees up more time to spend consulting clients or delivering services to the business.

Family Law Firm/Practitioner – Streamlined Intake: A family lawyer who does smaller fixed fee divorce cases at a fairly high volume needs a quick way to take information from the client and get it into pleadings to get the process started and utilize it for completing important forms during the case. Having an intake form for those matters that kicks off the starting documents and gets a workspace established with the information in one place enables an intake team and paralegals to focus on getting pleadings filed with the court and answering client inquiries.

Employment Lawyer – Low-End Work: As a labor and employment lawyer, you do everything from generating quick NDAs and employment agreements to handling complex employee claims, labor negotiations, and litigation for corporate clients. Your team could create online input systems for clients to generate those more straightforward documents and collect electronic signatures so you can spend more time on complicated matters that demand a higher level of specialized expertise.

What Firms Are Automating Outside of document assembly, what other processes has your firm automated? Top 5 responses:

- **Matter intake – 41%**
- **Conflicts – 31%**
- **Approval workflows – 29%**
- **Expense capture – 26%**
- **Filing into DMS/ECM – 25%**

*Source: International Legal Technology Association 2021 Tech Survey

Innovation Leader – Serving Corporate Legal Departments: Outside counsel providing full service to large corporations are asked repeatedly by their corporate legal departments for innovative ways to manage their work. This includes both less complex, high-volume repetitive items, as well as more technical matters requiring specialized expertise. Now you can build automated bespoke solutions tailored to a client's specific needs when it comes to handling a high volume of repetitive work. And you can be sure your innovative ways of solving client's unique problems will be frequently cited in client satisfaction surveys.



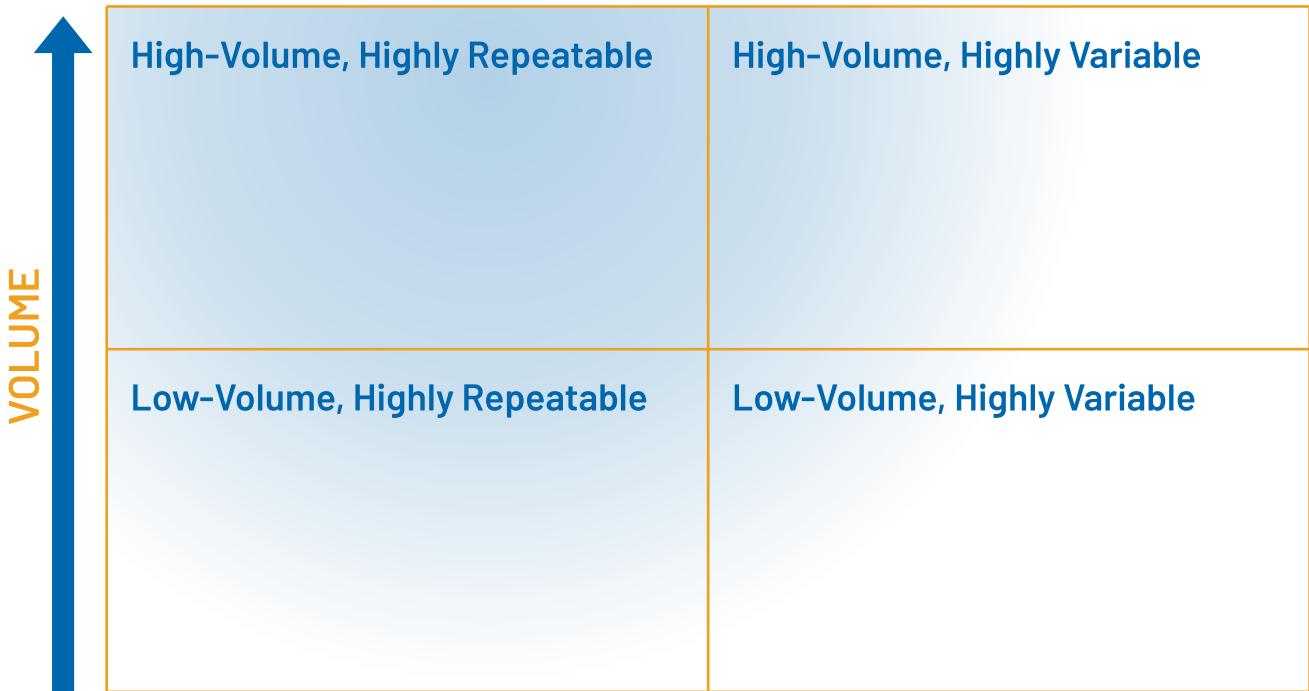
WHAT SHOULD YOU AUTOMATE FIRST?

Because so much of legal work begins and ends with documents, the best way for law firms and legal departments to immediately benefit from automation technology is to start with **legal document automation**.

The highly repetitive and high-volume nature of document creation and management tasks make them the perfect low-hanging fruit to begin your automation journey. The following heatmap can help you identify initial document automation opportunities.

Heatmap for Evaluating Initial Automation Opportunities

It is recommended that you start by automating your most high-volume and highly repeatable tasks and refine from there.



Not only will you receive significant and near-immediate benefits with the least amount of disruption to your current operations, but you'll also be simultaneously creating a solid foundation for bigger workflow automation upgrade projects in the future.



GETTING STARTED WITH EARLY SUCCESSES

Adopting any new technology can seem daunting but implementing automation into your current day-to-day operations is not as hard as it sounds. Here are some tips to help you get started.

- **Map Out Your Processes:** The best automation platform on the planet cannot overcome bad, disjointed, and/or misunderstood processes. It is imperative that you start with something simple and build up your automation muscles before diving into complex workflows. Lay out all the steps in the process and brainstorm how your chosen automation solution can eliminate steps or improve your existing workflows. Finally, don't get too locked into current processes or technology limitations or you may miss opportunities for improvement. For example, moving processes out of email inboxes.
- **Leverage Internal Expertise:** You likely have shining stars on your team who can help ease the adoption of automation into your daily workflows. Find those detail-oriented people the questioners who understand the legal logic behind your processes and tap into their enthusiasm for problem-solving and existing knowledge to help develop accurate process mapping. A clear, accurate, consistent automation will help get people on board to use it.

In large organizations, business analysts or trainers could be a big help because automation can improve business processes as well as your internal administrative processes. It is also advised to start with automating internal-facing work like memo templates, which are simple but used by everyone, to work out the bugs before rolling out on a larger scale. Early successes can deliver big dividends and drive momentum to get everyone excited about taking the necessary steps to make their jobs easier.



THE POWER OF COMBINING DOCUMENT AUTOMATION WITH YOUR DMS

While automation alone will bring countless benefits to your organization, combining automation technology with your existing document management system (DMS) brings even bigger advantages, including:

- **Inherited Security and Compliance:** The security features already included in your DMS, such as robust authentication, data loss prevention, encryption, and geo-aware storage to ensure data privacy, not only keep your documents and data safe from external threats but also maintain ethical walls and keep privileged information limited to only those who should have access.
- **A DMS that Houses Everything:** From clauses to expertise, your DMS is already storing documents, knowledge, and data, so why not take it a step further and add automation to the equation? By combining automation with your existing DMS, you can ensure a more efficient workflow to create and manage all of your data in one place.
- **Workspace Templates:** Different types of automation can be tied to specific customized workspaces, documents, users, etc., allowing you even greater efficiencies and consistency. Having automation apps automatically available when a workspace is created or even having an intake or self-service automation generate a workspace ensures your team has everything they need to do things the right way every time.
- **Integrates with Other Tools:** Document management systems should have the capabilities to integrate with other common tools, such as billing software, electronic filing, collaboration tools, DocuSign, and Microsoft Office, which enables a seamless end-to-end legal document lifecycle.



YOUR EXPERTISE – EVERYWHERE

While there are many great automation tools out there, keep in mind not all of them are suited to handle the sheer volume of document creation legal teams need, incorporate the complicated logic involved, or provide the level of security required for sensitive and privileged information.

Now that you have seen examples of common challenges being addressed by automation, it's time to take a look at your processes and identify low-hanging fruit opportunities to experience quick successes. Map out your processes and you'll soon be able to empower your people to automate their expertise and focus more time on higher-value work that adds value to clients, your teams, and the business.

Sources:

- ❑ American Bar Association: "Top 5 Legal Technology Trends You Need to Know"
- ❑ Gartner: "5 Legal Technology Trends Changing in In-House Legal Departments"
- ❑ Gartner: "5 Legal Technology Predictions Through 2025"
- ❑ Lawyer Monthly: "How AI and Automation Are Transforming Legal Teams"

SUMMARY

There is no universally perfect way to implement automation into an existing workflow that will suit every company because every business is unique and has a different set of circumstances around it. But the benefits of automation are significant and universal for business growth and success.

Automation provides opportunities to reduce processing costs and increase the productivity of employees by freeing people from tiresome tasks. This opens the door of possibilities for people to take on more exciting, challenging assignments, fulfill their potential, and successfully achieve business goals. It also allows users to optimize operational costs, calibrate workloads of employees and grow successful businesses all over the world.

All in all, Robotic Process Automation is a beneficial tool that helps to boost productivity, achieve more without a new workforce and digitally transform your workflow.

If you would like to speak with us on this topic or any other, please reach out to us here:

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We are committed to providing innovative solutions to help your practice succeed in today's competitive landscape.



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