LAWYAW®

THE ESSENTIAL GUIDE TO

LEGAL DOCUMENT AUTOMATION

Tips and Best Practices for Software Evaluation, Process Management and Successful Technology Adoption

TABLE OF **CONTENTS**

INTRODUCTION

Thanks for downloading our eBook! We hope you find this content helpful.

Our goal with this guide isn't to convince you that Lawyaw is the best solution for legal document automation, but to provide you with a deeper understanding of how legal technology such as document automation can benefit law firms, and what legal professionals need to know to successfully adopt technology and adapt internal processes.

One thing that's important to keep in mind is that software "solutions" are a means to an end (solving a problem) rather than a panacea themselves. Buying document automation (or any legal technology) shouldn't be the goal for your firm — solving a specific problem should be. That's an idea we'll cover in more detail as you get deeper into this eBook. We'll share some best practices to consider when evaluating potential solutions, and when implementing new technology at your firm. Those steps can be more impactful than which solution you choose in some cases.

If you read this publication in its entirety, you might find that you are more interested in a solution other than Lawyaw. We're ok with that.

Lawyaw isn't the right solution for every firm, but there are thousands of firms already using our technology to save time, improve efficiency and morale, deliver better client service, and increase profitability. In this eBook we've compiled some of the lessons we've learned along the way to helping those firms be successful with technology.

Whether you agree or not, we're pretty sure tools like ours will reshape the legal industry for the better by enabling legal professionals to spend more time focused on important and meaningful tasks rather than burning the midnight oil on rote drafting. We'd love to have a conversation about that sometime, so **contact us**, if you're interested.

I. Falling in Love with the Problem: A No-Fail Process for Improving Your Law Firm with Technology

Whether you're a firm owner, partner, solo or admin, you probably feel some pressure to improve your practice. "Some" might be an understatement because you regularly get email solicitations or LinkedIn messages from legal technology vendors emphasizing all of the challenges firms have to solve.

You know there are ways to improve your firm's services, but who has time to evaluate every offer and opportunity?

There's one key to getting this right: Begin and end with the problem you need to solve.

Begin with the Problem

Before you evaluate possible innovations in your practice, you first need to prioritize what problem(s) you aim to solve.

It's certainly tempting to do the opposite. Whenever you attend a legal conference or check your email inbox, it's easy to prioritize solutions first. You see a hundred shiny objects that offer an easy way out. Resist the temptation!

You don't just want a solution, but the right one for your specific problem. Follow this five-step process for prioritizing and selecting tools that will be most impactful for your firm:

1. Walk to the nearest whiteboard or wall. Use sticky notes to **brain dump everything that drives you nuts about your firm.** Client communication, court filings, document drafting, accounts payable, etc. But be as specific as possible. Dig into the broad problems to identify the specific pain points. Put every problem on the wall.

2. Prioritize these problems using a simple rubric. **Identify which factors make some problems more impactful than others.** Would solving a problem bring new revenue? Is there a time constraint that bumps up the urgency? Are clients impacted by a problem? Decide which few factors move the needle most for you and use that to score the problems you've stuck to the wall. Firms could have team members vote with stickers or pins to pick the most significant problems to them — whatever works for you. Then move the sticky notes with the most signals of priority up to the top. The problem that ends up on top is the one you're going to solve first.

3. Now, **stay focused on that one problem.** Start the brainstorming process again and use similarly expansive thinking to imagine possible solutions to your problem. Are there low-tech solutions? People-intensive solutions? Automation? Create a new set of sticky notes with every possible solution to your one problem.

4. As you did with your original set of problems, **prioritize your solutions** with a simple set of factors that are most important to you. Maybe you pin solutions that are cheapest. Maybe you give points to the fastest solution, the one with the most downstream impact, or the easiest to implement. At the end of this second prioritization exercise, you'll have one solution that ties directly back to your one problem.

5. **With a solution in hand, set a deadline and identify an advocate.** You'll need one person who'll own implementation. If you're a solo lawyer, you can hire some help for this, or pretend that 'CEO You' has an assignment for 'Lawyer You.' Whatever the result, one person should have a clear vision of the problem/solution pairing and be empowered to manage the implementation process for the rest of the team. (Skip ahead a few chapters to read more about process changes and technology implementation best practices that further improve your chances of success.)

A Sample Problem/Solution Pair

Let's take the example of a family law practice (although this works with many different practice areas, if you imagine specifics relevant to your day-to-day operations).

If you serve families in divorce and custody proceedings, you can picture a full wall of sticky-note-frustrations:

- Clients are in a hurry but don't send you the documents you need
- Courts require timely filings but send back documents for vague reasons
- You can't collect on hours or bill for flat fees as cases wait for updates
- You're worried that drafting errors are causing issues but you're stuck with "find and replace" in Microsoft Word
- And so on…

Of all the possible problems, you decide to focus on quality control. You're most afraid of clients noticing embarrassing mistakes in a footer after a late night of work, or you've had a court filing rejected for errors in a document.

Having chosen your main problem, you brainstorm solutions:

- You could create every document yourself from scratch every time
- You could purchase a library of expensive forms and templates
- A more expensive contract attorney might give you better custom forms
- You could incorporate document automation into your practice
- Bringing in co-counsel might help you distribute the risk of bad service, etc.

If you prioritize a low-cost solution that lets you keep control of your processes and guarantee quality, you might move the "document automation" sticky note to the top. But that's just an example. Once you choose a problem/solution pair, it's time to implement.

The Problem Will Keep You Going

The hardest thing about improving your practice with legal technology is getting people to actually use a new tool. Here are a few things you can do to give your firm the best chance at following through:

1. **Choose a project manager.** An assistant, associate, partner, you — someone needs to own the solution, vendor relationship, and stay focused on making it successful.

2. **Identify a super-user.** When one person commits to digging into the tool and productively pushing back to understand everything, implementation improves.

3. **Get training.** Most technology companies come with customer success specialists. These service agents are tasked with helping you succeed. Use them to help.

More than anything, keep the problem that motivated you in mind.

Shiny objects won't keep you pushing ahead (and some will set you back farther if they become a distraction and drive up your costs). Focus on the problem that irritated you in the first place to keep moving forward. You might even save that sticky note as a trophy reminding you or your team of the way things used to be.

And when you're satisfied, start with the problem on the next sticky note below. One by one, you'll change your practice for the better.

II. The Value of Document Automation for Law Firms

While it's an important part of the job, document drafting falls into the category of shallow work, which is defined as "non-cognitive, logistical or minor duties performed in a state of distraction", according to **Cal Newport, author of "Deep Work".**

This shallower work is often considered to be repetitive, mundane and less fulfilling than the more cognitively demanding, and rewarding aspects of the job — such as building relationships with clients, or successfully arguing a case in court.

What can legal professionals do to win back time? A lot of small and mid-size firms are automating document assembly, which can sound like a daunting task but is really a lot simpler than it's technical-sounding name might suggest.

What is Legal Document Automation?

Document automation is technology that helps lawyers draft legal documents quickly and accurately by identifying information such as dates, names and clauses that change each time a document is used for a client or matter.

Benefits of cloud-based document automation include:

- Simplifying your document creation process
- Enabling easier delegation of tasks and remote collaboration
- Converting your existing documents into reusable templates
- Auto-populating key information across sets of documents simultaneously
- Auto-inserting specific text based on rules (conditional logic)

How Does Document Automation Work for Legal Practices?

Perhaps you have a document where the number of parties changes on a case by case basis, thereby requiring changes in each document. For example, when a client has no children, a section of a certain document is not included. However, when they do have children, the section is included. Also, the subject-verb agreement will have to be correct throughout the document, which all depends on whether there are no children, one child or several.

It can be tedious to go through a Microsoft Word document to find/replace all of these subject-verb agreements and other areas that require updates. That's where automation comes to the rescue. Instead of manually finding and replacing, a document automation solution will prompt you to enter the number of children. Then, the software will make the appropriate changes throughout the templated document.

So, if there is one child, the document will read "The one child was..." instead of "the one children were…" or some similar mistake.

Common Misconceptions About Document Automation

Before you understand the main features of document automation, it is important to cover some common misconceptions about the technology.

Here is what document automation is NOT.

1. Generic pre-made templates

Each case comes with its own specifics, and each lawyer comes with their own expertise and method. So, generics have no place in document automation. Instead, document automation helps law firms capitalize on their expertise (i.e. finely tuned legal documents). No software can replace that hard-earned experience.

> **Key point:** A quality document automation solution will help you use your knowledge when creating templates, not hand you pre-made templates created by people who don't share your deep understanding of your clients and practice area.

2. Find and replace

You might be familiar with the "find and replace" technique since it's used widely in the industry today. Yes, you can do "find and replace" and get the same results, but you have to spend the time doing all that manual work, and there are still risks of errors in footers or similar typos. Document automation is more efficient and user-friendly than time-consuming manual techniques.

> **For example:** With Lawyaw, the areas that have changed in a document are highlighted so that you know exactly what text has been replaced and can review everything quickly and easily.

3. Something requiring a computer science degree

Good document automation should make your life easier, not harder. The right solution means you don't need a computer science degree or a technical background to receive value from document automation. Most of the software is intuitive and easy to learn, even if it does require some setup and customization to make it work best for the needs of your practice.

4. A dangerous robot sent from the future

Most document automation software is built by industry professionals, not robots sent from the future to make your job more confusing. For example, Lawyaw is a document automation solution built by lawyers for lawyers. Our practical experience translates to a deep understanding of the documents used in the practice of law.

Benefits of Document Automation

1. Save time

Lawyaw found that firms using document automation save as much as 83% of the time they previously spent on document drafting. So, where do these time-savings come from? The biggest time-saver is the fact that you only have to enter information once — information that can be used in many matters during the course of a client relationship.

Plus, that time-savings is compounded when you create a template set, a group of similar documents you use regularly for clients. With automation, information will auto-populate across an entire group of documents simultaneously and save you the effort.

2. Avoid errors

Lawyers at smaller firms wear a lot of hats. They're often switching between different clients, matters and tasks, each with their own specific needs. This legal multitasking combined with manual processes can cause mistakes. If you overlook a grammatical error or misspell a name, that can cause reputational damage with a client, or cause issues with court filings.

With document automation, you can set up guardrails that make these errors easy to avoid.

3. Empower your team

Document automation makes it a lot easier to delegate legal drafting tasks to other members of your team, including associates, paralegals or admins. When these members of your team have access to templates, designed by experienced lawyers, this enables more of your team to work on billable tasks without constant supervision.

And, thanks to the centralization of the documents, it's easier to collaborate on and review documents created by other members of your team — even if you're all in different locations.

4. Focus on what matters most

When you spend less time on legal drafting, you can focus on what matters most to you. You didn't start practicing law because of a deep passion for drafting documents like commercial leases or engagement agreements. Most of us joined to make a positive change, whether that change is in our clients' lives, our family's lives, or perhaps something loftier, like fostering a more just society.

When you can automate the bulk of legal drafting, you can spend more time doing whatever it is that excites you about your career. Not to mention, you have more time for life outside of work, whether that means watching a movie, playing a round of golf, grabbing a coffee with friends, reading a good book, or whatever else you enjoy.

III. Key Considerations for Evaluating Legal Document Automation

If you're like many lawyers, creating new documents is a tedious process. Maybe you have a template for the most common docs. Or you search for the files from a previous client with the same document and hit "save as" to create a new version.

From there, you still have to:

- Copy/paste the new client details over the previous data
- Manually input new information, making sure to erase things that don't pertain to the current case
- Hit "control-F" or "command-F" to search for anything else that needs to be updated

This kind of process leads to minor errors, which can create big headaches for filings or give clients the wrong impression. Some lawyers seek out a solution and find the growing field of "document automation solutions." Now you have another struggle — finding the right provider.

Choosing the wrong solution equals wasted time and ultimately paying for something you won't use at your law firm. Then, it's back to the previous "save as" system, where you started. Not ideal!

There are a variety of automation tools out there. Some of these tools are specific to the legal field and others serve a broader spectrum of industries. Understanding which is best for your law firm comes down to a clear review of features and how they translate to the legal field, and your specific needs.

This guide covers some critical features law firms need to understand when evaluating document automation solutions.

7 Specific Document Automation Features for Legal Professionals

1. Store Client Data

Document automation software allows users to create a smoother workflow and drafting process for your documents. That's the standard function of any solution in the category. As a lawyer, nearly every document you create includes client and matter details.

An optimal solution should include the ability to store the client information. This capability allows you to pull up your chosen form or template set, choose the client whose details must be inserted and the software pulls the right data into the proper places throughout the documents.

Some document automation solutions allow client data to be stored, while others do not. There are many uses for tools that don't store data, but for lawyers who work with clients over multi-year relationships, the value of being able to drop in previously used information creates meaningful time savings.

2. Federally Compliant E-sign

If you're currently using an old-school document workflow, it's possible you also have trouble gathering signatures in a fast and efficient manner. In a world that quickly moved away from in-person meetings due to the pandemic, getting clients to sign documents requires a solid process and useful technology.

Current patchwork solutions include:

- Requiring clients to have (or obtain) software to edit PDFs and sign
- Emailing a document and asking the client to print, sign, scan and return it

The more a client has to do to get signed docs back in your hands, the longer the process takes (which probably also delays your payment for the work). If you're using either of the above methods, you probably understand the challenging communication delays and time-consuming process of obtaining client signatures.

There are document automation solutions that have built-in, court-compliant e-signature functionality, which enables both drawn and typed signatures (allowable e-sign formats vary by court, so always be aware of local requirements for e-signatures).

3. No-code Template Building

Aside from the fear of choosing the wrong solution, many law firms are concerned about implementing new software. Even if the process you're using isn't the most efficient, it's getting the job done. When you hear "create templates" or "set up workflows" it sounds overwhelming when you're already busy. To be honest, some automation solutions are a bit more "hands on" when it comes to setup than others.

Choose a document automation tool that gives you options. This includes being able to easily build templates and assemble documents without writing any code. Ease of use is becoming more common for modern document automation solutions, but not all tools are created equal in this regard.

Some solution providers also have options to help you with set up of your templates. This can be a major differentiating factor when making choices about software, so be sure to consider your needs and talk to companies you're considering about what they offer.

4. Conditional Logic

When a couple needs a will and other estate planning documents, whether or not they have children has a big impact on the subsequent documents. That doesn't just mean dropping certain clauses, but subject/verb agreement and other potential issues.

A document automation platform that includes "conditional logic" assembles necessary clauses (and/or skips unnecessary clauses) based on the inputs and client data you provide. This automated process saves the time to manually find unnecessary clauses.

When you're considering a document solution, you should ask yourself whether conditional logic is something that you need. Some firms require it to quickly and easily assemble complex packets of documents, but it's not something every user needs. It's one feature whose availability and capabilities vary widely among document automation solutions today. So if the answer to your question is "yes, I need conditional logic," be sure to talk with vendors about how their functionality works to be sure it aligns with the use-cases you have at your firm.

5. Template Sets

Many legal practices need to assemble packets of documents that they use together for similar types of matters. Being able to assemble sets of templates and save them as a group that is populated with client and matter data in just a few clicks saves valuable time for key staff.

> **Example:** An estate planning practice includes templates for a fee agreement letter, a will, power of attorney, and health care directives for its estate planning clients. Rather than manually editing each document, all of the necessary documents are updated and proper formatting is maintained throughout.

There are many potential applications for different practice areas to quickly and easily assemble packets with a document automation solution, but if a solution doesn't offer the ability to bundle documents and fill them simultaneously, that's something you want to understand upfront.

6. Assign Multiple Roles (to a Single Contact)

The ability to assign multiple roles in a particular document template (or template set) is a functionality that's specifically valuable for law firms (compared to solutions that cater to multiple industries).

There are frequent instances where a client might have multiple roles in a matter.

- A person is client, spouse and plaintiff in one set of documents
- A client's child is next of kin, beneficiary, and power of attorney

If a document automation solution requires a unique contact for each role, it can create headaches for many legal-specific uses.

7. Integrations

When people talk about technology integrations, that's simply the ability to connect one application to another. These connections have benefits, like simplifying the syncing of data from one app to the other without needing to enter information into both programs.

When evaluating technology, it's important to understand how integrations will impact your ease of use. For example, if you already use a practice management software, can your client data sync with a document automation tool. This can influence whether or not a specific tool is the best solution for your firm. You might hear the term "stack" get used with technology. This is the idea that as your firm adopts different tools, they will need to work together to produce the best results. Integrations may not be something that you need to worry about right away, but if it's of interest, then it's important to understand before you subscribe to a new software.

IV. Managing Change and Preparing for New Technology

Improving your law firm in an increasingly competitive landscape often rests on technological upgrades for increasing capacity. This could be an attempt to increase efficiency, decrease costs or reduce repetitive administrative tasks.

But adopting and implementing new technology, along with the associated operational changes, is never easy work. When your team is time-constrained or worried about the prospects of learning a new platform, it can be hard to get everyone on board.

For instance, 53% of 700 legal professionals surveyed said the biggest barrier to change for law firms is the difficulty of change management and leadership resistance to change, according to the **2020 Future Ready Lawyers Survey.**

This resistance can have consequences, causing firms to miss out on the benefits of new technology.

Thankfully, there are some actions you can take to effectively manage change and prepare for new technology in your firm.

Paint a Clear Picture of the "Before" and "After"

Implementing a new technology can sometimes be a heavy lift. Therefore, it's good to figure out the "Why" behind the change. That way, your team will maintain the motivation needed to find, evaluate and integrate the new platform.

To make the reasons behind the change understood by your team, paint a clear "Before" and "After" picture. Before even shopping around for the right vendor, host a meeting and make sure everyone is on the same page about the following:

The problems you are trying to solve: Are people spending too much time on repetitive legal drafting? Do people wish they had more time to meet with clients?

The scope of change: Which aspects of their jobs will change? How will certain processes look after adoption of a new solution?

The implementation timeline: When is it happening? When will documents migrate? Will there be a training/onboarding period? And if so, how long will it take to ramp up?

Benefits/ROI: When will you see an ROI? A month from now, or a year? And how will you be better able to act as lawyers after this change?

Unknowns cause fear and worry. But, once everyone can visualize how the change will affect their lives, it won't seem as frightening, especially if the "After" picture is one where everyone can spend more time doing what's important.

When your team aligns on a vision of the future, they will be more willing and capable of working together to make that vision a reality.

Handling Internal Objections is Part of the Process

When adopting new technology, concerns will always arise. People will ask, "how will it change how I do X?" or say, "we don't have enough time to learn a new system."

It's this period of time where you start moving mentally from an idea to a concrete change. And during that critical thinking process, objections will come to mind.

So, when the objections come from your team, don't ignore them. Instead, accept them as a part of the process. Then, have a conversation about each objection so that you can manage your team members' worries and hesitations before any onboarding process begins.

You want to do this early on in the process. This will preclude the possibility of unhappy employees potentially derailing the success of a new tool.

Have debates early, work through them and come out as a stronger group in the end.

Assemble an Implementation Team

Adopting new technology is not a one-person job (unless you're a solo, but then everything's a one-person job). You'll want a dedicated team to manage separate parts of the change, from evaluation to training.

In general, the more people using the software, the bigger the implementation team should be because you'll want to have advocates for the new solution helping with outreach to the rest of the organization.

Here is a suggested set of roles for an implementation team:

Project Owner: Usually the person spearheading the change. It could be a partner, the CEO or another experienced member of the team. This person will assign other roles.

Project Manager: In charge of organizing the implementation process, including working out the budget, defining technology requirements and forming a list of potential vendors.

System Administrator: Works (often with IT) to oversee the system's setup. This should be a tech-savvy individual since some software setup can require technical experience.

Superstar End-User(s): The go-to person (or people) who act as a liaison between end-users and the implementation team. During implementation, superstars will be available to help troubleshoot with other team members.

Also, remember that the success of your project depends on the enthusiasm and motivation of the people leading the change. So, include on this team the most committed members of your firm who are ready to embrace change and who will be impacted by the technology day-to-day.

Quality Training Drives User Adoption

No one wants to use something they don't fully understand. If your team isn't properly taught how to do something, they will revert back to old, less efficient systems.

Firms take on new technology, and everyone is excited. But, after those initial onboarding meetings, no one is using it and the ROI remains unrealized. That's why it is so critical to create an effective, personalized training program — one that makes relevant team members feel comfortable with the new platform.

So, how does one do that? Here are a couple of tips for training your team on the new system.

Leverage influential users: Along with your superstar, those who are succeeding more quickly can help those who are struggling.

Document the processes in a centralized location: Sometimes lawyers just want to figure it out on their own. They can easily do that if the processes and technical information are easily referenced.

Host individual follow-ups: Some people might not voice concerns or challenges in a group session.

Focus on the most critical features: It is easy to become overwhelmed by all the bells and whistles of new software. To avoid distraction early on, stick with the most important features first. Then, when people are comfortable, expand the focus.

Remember to ask your vendor about training options. A lot of tech companies have online "learn at your own speed" courses, white papers and other materials for training. Some companies also offer custom onboarding assistance or support services.

Build a Culture of Efficiency

When you have a process that works, you can start to improve internal operations to solve for a range of different problems you experience. This can be part of the culture of your law firm, as you prioritize efficiency and reduce waste. As efficiency becomes part of your firm's DNA, you'll become more proficient in implementing new technology.

V. 8 Steps to Repeatable Law Firm Processes

Every day, you and the people at your law firm engage in processes.

A client comes in, they have problems that you know how to solve, you get them to pay for your services. You take their information, turn it into all kinds of documents, phone calls, and emails, then you bill them for the effort. All processes.

But how do you know the steps you're taking best serve your clients? Or judge whether those steps are optimally efficient or profitable?

With just a little bit of design and documentation, you can turn those steps that are dictated by habit into measurable guarantees of quality and performance for your clients.

Here is a simple 8-step process for shaping your firm's key operations:

1. Write it all down.
2. Cut it by 20%.
3. Define your purpose.
4. Identify your inputs.
5. Map client-facing steps.
6. Map internal steps.
7. Share what success looks like.
8. Hold yourself accountable.

Write It All Down

You're not coming up with processes out of thin air. Remember, you're already engaged in processes. Our job now is to design them more purposefully.

The first step is to pick a process your firm engages in and put it all up on a wall. Grab some sticky notes and a marker and brain dump every step. Put down what you currently do and label each note with who owns that particular step.

When you do this, avoid the temptation to start with your intake process. That's a common starting point because it comes at the beginning of a client engagement, but it's easier to start with a simpler process. Work out your phone call script or how you end a client engagement instead. Find part of your daily operations that hasn't been given much thought before and add purpose to it. Then work your way up to the complicated stuff.

Cut It By 20%

The fastest way to improve a process is to reduce the size and complexity.

Every firm takes steps that are driven by inefficiencies and delays. Some of those are created by outside forces (clients, courts, or clerks, for example), but many of them are created by you.

In this step, try to reduce the number of steps in a process. What do you see on the wall that you could kill? Are there handoffs happening that you could eliminate by having one person own more parts of a process?

Find the fat; trim it back.

Define Your Purpose

As you start your process document, put a plain language goal at the top of the page. Anyone should be able to read this and know the most important outcome(s).

Often your team may need to deviate from the specific steps due to circumstances. Although you want that to be rare, it will happen (but don't let it happen too often, otherwise, why are we documenting processes?). Empower your team to make decisions by clearly defining your "why" at the top of the page.

Identify Your Inputs

Processes don't stand alone. Processes require information, people, and materials to proceed, which are all "inputs" that will shape output. What do the people involved in a process need in order to complete it successfully? If a person must get up from their desk or email a manager every time an unknown input is required, you're setting up an inefficient process that won't save anyone time.

What will team members need to complete the steps in the process, and where do those inputs come from? List them out. How can the people responsible for this process gather all of the inputs they'll need in as few steps as possible? That's improving efficiency.

Map the Client-Facing Steps

Think of seeing a performance in a theater. The audience sees what's happening on stage, and that's how they judge the show, but there are things happening backstage as well. Those invisible processes enable the action on stage. As you map your process' steps, start by identifying what the client will see on their end. This helps you be more client-centered (and it might give you more ideas for improving efficiency, if you find steps are duplicative or offer no client value).

Map the Internal Processes

Now that you know what's happening on stage (i.e. what the client sees), you can map the backstage action needed from you and your team. These are the steps most people think of when they think of processes. Use the plainest language possible when outlining your internal processes. You don't want things to fall apart because no one understood what the documentation meant. These documents won't be filed with any court, so avoid the temptation to be too lawyerly. The goal is to clearly communicate, because these process documents should be a resource.

Share What Success Looks Like

Members of your team should be able to quickly identify what a process looks like when it's done right. Similar to defining your goal up front, this empowers people to make decisions even when confronted by novel situations. Share scripts, sample documents, and even offer role playing opportunities for your team so you can test drive the new process and work out any kinks.

Ensure Accountability

A process map won't help if no one uses it, or if they go back to doing things the old way once you're finished. If you've done the work to select processes that matter to your firm's operations, then you want to get them right.

Someone needs to take responsibility integrating the new-and-improved process. Maybe that's you, or maybe it's someone on your staff, but you'll need to have someone who is committed to making sure the new process sticks (and that whoever is responsible is empowered to ensure compliance).

Be cognizant of personality types within your organization — for example, if you're changing a long-standing process, it may impact staff who've been with you the longest differently than newer additions to the team. Definitely favor the carrot over the stick when you're getting started. You might even try to make it fun, like turning the new process into a contest (with prizes) to incentivize team members to work together to make sure everyone is doing their part.

Conclusion

This formula for creating processes will get you started. Whether you're a business owner or part of a team, you should be flexible in your approach to systems. Efficiency gains may not be large when you're not serving clients at scale. However, documented processes allow you to evaluate the firm's work and to empower staff to make decisions without constantly consulting leadership. The results should help everyone do a better job.

www.lawyaw.com