Clio Draft

Legal Workflow Automation & Optimization

What Is It and How Does
It Benefit Your Practice?

Introduction

The law is constantly changing—and so, too, are the tools that can help make your practice more efficient and save you time. If you aren't keeping up with these advancements, you may be missing out on tremendous opportunities to streamline your practice and automate routine tasks.

But where do you start? As legal professionals, you juggle countless tasks on a daily basis and prioritizing change management can be a challenge. That's where legal workflow optimization and automation can help.

In this guide, we'll introduce the concepts of legal workflow optimization and automation. We'll cover the differences between the two concepts and how law firms can quickly optimize workflows and automate routine tasks to increase efficiency, productivity, and profitability.

What is legal workflow automation?

Legal workflow automation is the use of technology to remove and minimize manual tasks in law firms. For example, Clio Draft's document automation features allow law firms to populate legal templates automatically, rather than having to create and fill out templates manually. Or, a law firm using Clio Grow can save time and avoid errors by harnessing the software's automatic syncing features, which ensure that any client information captured in Clio Grow is synced directly to Clio Manage.

With legal workflow automation, the possibilities are truly endless. Law firms can automate anything from billing to document management to increase efficiency, accuracy, and productivity.

At the same time, these tools can help law firms not only reduce overhead but also decrease the risk of errors that can arise through manual workflows.

Finally—and perhaps most importantly—legal workflow automation can help free up staff from redundant tasks, allowing every member of your team to focus on more impactful and engaging work. Think about it this way: rather than spending an afternoon drafting routine documents, lawyers harnessing the power of legal workflow automation can devote more time to their strategy for an upcoming trial—or perhaps take an afternoon off to rest and recharge!

AUTOMATION VS OPTIMIZATION

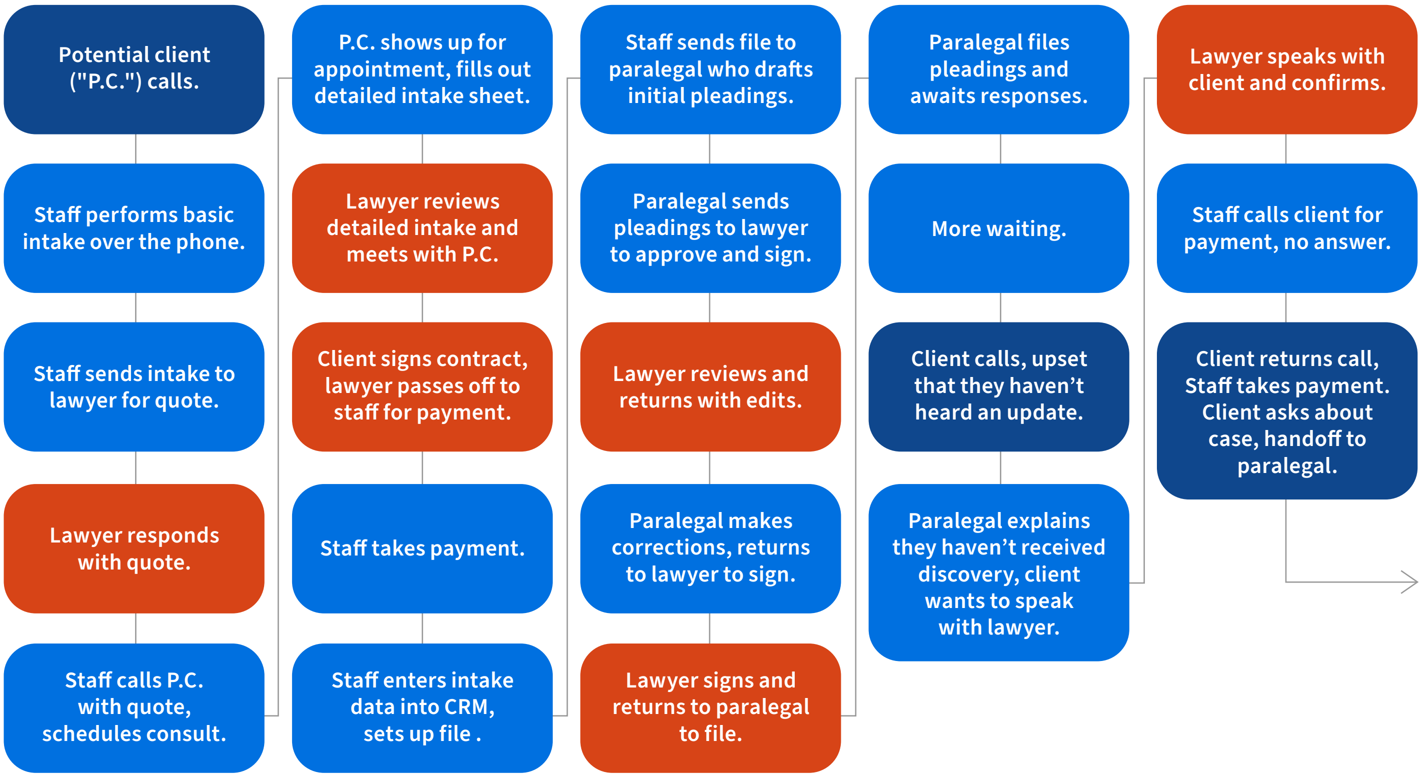
When you're researching how to improve your law firm's processes, you'll come across a lot of terms and concepts that can be hard to differentiate. So, what do we mean when we're talking about the difference between automation and optimization?

Optimization is a broader category of efficiency—essentially, "optimization" refers to the processes and tools that make your workflows more efficient. "Automation," on the other hand, is a part of optimization that focuses on the use of technology to minimize or remove manual tasks.

To further drive the distinction home, let's consider an example of what a non-optimized law firm workflow might look like:

OPTIMIZATION VS. AUTOMATION

The Traditional Approach

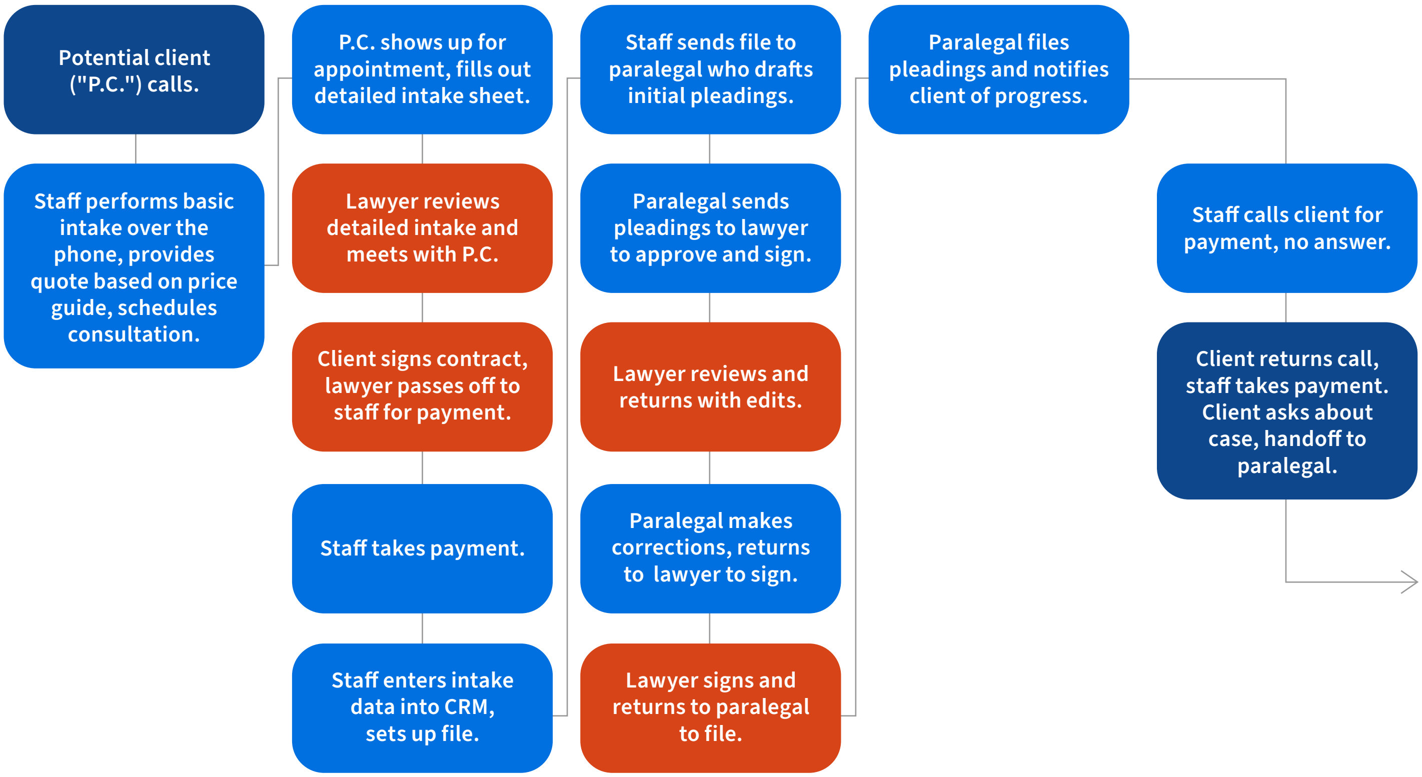


What inefficiencies jump out to you? For one, you'll notice a lot of unnecessary back and forth in these steps. As an example, the staff member performing intake with the potential client sends the client's intake form to the lawyer for a quote, waits for the lawyer to respond with their quote, and then follows up with the client to provide the quote before scheduling a consultation.

Next, let's see what a similar workflow would look like after it's been optimized:

OPTIMIZATION VS. AUTOMATION

The Optimized Approach



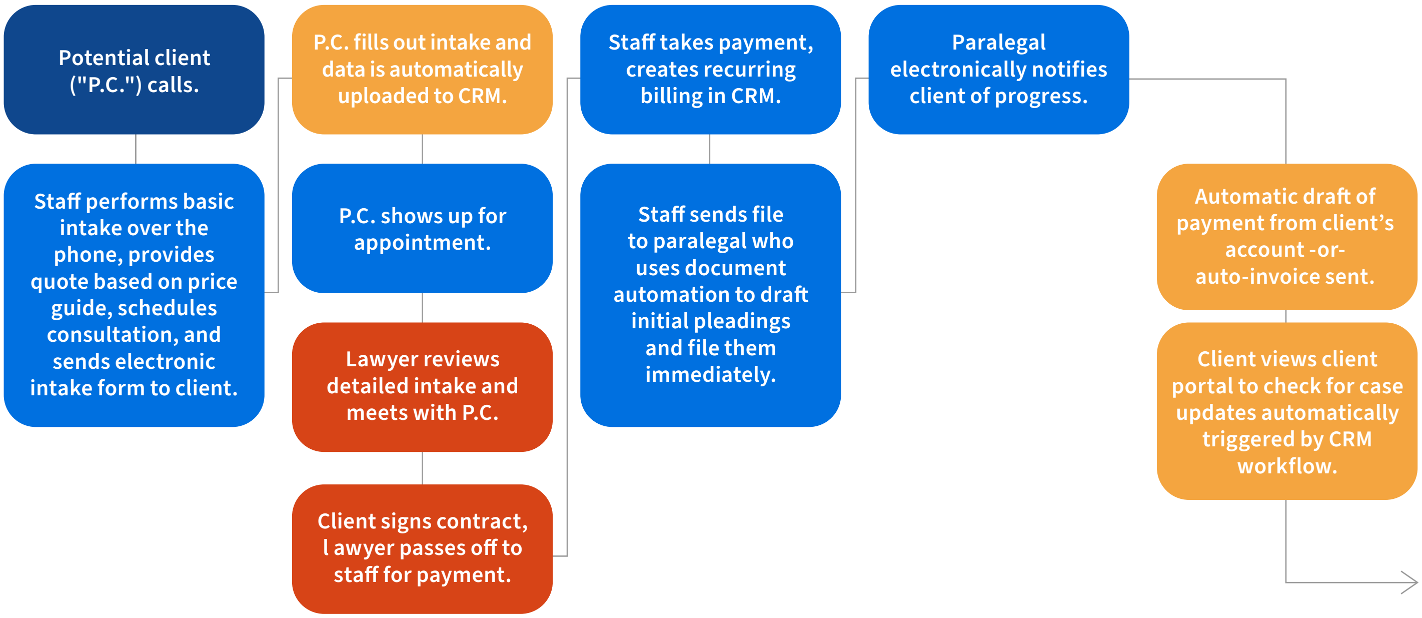
Here, we can see some improvements over the non-optimized workflow. For example, the staff member handling client intake has all of the information they need to provide the prospective client with a quote and schedule an initial consultation, removing the need for unnecessary back and forth with the lawyer.

However, some inefficiencies remain. For example, the paralegal drafting the initial pleadings must provide them to the lawyer for signature, after which the lawyer provides edits that the paralegal must correct before sending the pleadings to the lawyer again for review and signature.

What could this workflow look like with the help of automation?

OPTIMIZATION VS. AUTOMATION

The Automated Approach



Here, we see how optimizing workflows and addressing remaining inefficiencies with automation can have a tremendous impact on a law firm's efficiency. Using the intake example, we see that the staff member has the information and tools necessary to not only provide a quote and schedule a consultation, but also send an electronic intake form to the client before the initial consultation. This step results in cumulative time savings, as the client provides information about their claim in advance of the consultation, allowing the client and lawyer to focus on the most important details during this meeting.

Likewise, we see how automation can help with a routine task: drafting pleadings. In this automated workflow example, the paralegal uses document automation to not only draft but also file the pleadings, removing the back-and-forth required to ensure the paralegal has drafted the pleadings correctly.

Why automate your workflow?

While there are plenty of reasons why law firms should automate their workflows, a few benefits stand out:

- **Keeping up with the competition:** Many law firms are already on the automation bandwagon. If you don't get on board, you risk being left in the dust. With automation, many firms are saving time, allowing them to take on more and more cases. And, in some cases, automation may provide a competitive advantage when wooing prospective clients. Look at it this way: a potential client reaches out to two law firms for help with a legal issue. One firm replies almost instantly with an automatic reply from a chatbot or other automated system to set up a consultation. With the other firm, the client waits several days for a callback, and the staff member still has to check with their lawyer to confirm pricing and availability before scheduling a consultation, leading to even more time wasted. Chances are the client will have already hired the first firm before the second is even ready to schedule a consultation.
- **Attracting and serving new clients more efficiently:** There's a lot that has to be done when onboarding new clients, regardless of their legal issues. You'll need to not only collect basic information but also information about their claim (and, depending on the type of claim, this could involve countless details ranging from treatment providers to beneficiaries to documentation). You'll need to schedule consultations and get aligned on expectations and instructions—and all of these interactions add up. As shown in the examples above, automation can greatly reduce the back-and-forth—and time spent by your law firm collecting this information—to make the onboarding process feel much more seamless for your new clients.

- **Minimizing human error:** We're all familiar with the phrase "too many cooks in the kitchen spoil the broth"—and, unfortunately, the sentiment is all too familiar in a law office. For example, you might assign a staff member to draft a set of pleadings for you. You review the pleadings and make some corrections (but perhaps you miss a couple of issues that you should have initially spotted, or you fail to notice that they aren't using the most up-to-date version of one of the court forms). When it comes time to make the corrections, another staff member is tasked with revising the document and inadvertently introduces additional errors (but misses other ones). All of this is to say that humans make mistakes, and those mistakes can be compounded when multiple humans are working on one document. With automation, you can minimize the risk of error by ensuring that the right information populates into the right forms.
- **Reducing overhead costs:** At the end of the day, law firms are businesses and they need to make money to be successful. However, balancing revenue and overhead can be challenging, particularly when a law firm's biggest expense tends to be overhead. The goal is to minimize overhead and, ideally, maximize the number of clients you can bring in to help your firm grow and remain competitive. This isn't to say that firms should be replacing staff with automation tools—rather, it's about freeing up staff workload so that they can focus on the human needs of the firm and building relationships with clients.
- **Freeing staff and lawyers from redundant tasks:** Most people working at a law firm agree that there's not enough time in the day. Yet so many lawyers and staff members spend countless hours on routine or redundant tasks that could be easily automated. By optimizing and automating workflows at your law firm, you can free up more time to spend on tasks that require your skills and expertise, such as client relationships and case strategy.

How to optimize your workflow

While it's all well and good to talk about the benefits of optimization and automation, understanding how to optimize and automate workflows is another matter.

Here, process mapping is essential for planning out how you will implement these new workflows and tools. Through process mapping, you identify what the current process is for performing a particular task. And then, once you've figured out what that process looks like, you can then identify opportunities to optimize and automate. To start the mapping process, think about your objectives.

The goal is to:

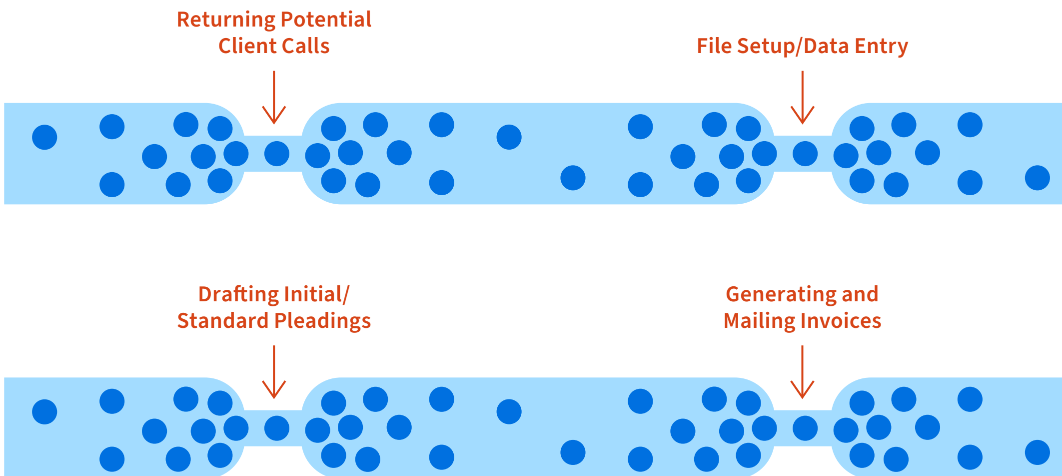
1. Identify an underperforming process.
2. Note the people executing the process.
3. Determine which decisions and events occur at every step of the process.
4. Detail each step clearly and visually.
5. Search for bottlenecks and slow-downs.
6. Analyze data to find areas of improvement.
7. Create an actionable plan for improvement.

NOT SURE WHERE TO START?

For some, it might feel overwhelming to even figure out what processes aren't working to begin with. If you aren't sure which processes you should be mapping, look for "underperformers" and "slow-downs."

- **Underperformers** are areas of your organization that are noticeably failing to meet goals or simply not living up to desired expectations. For example, perhaps you're noticing that client invoices aren't being sent out promptly or that many clients aren't paying their bills on time.
- **Slow-downs** are processes and teams that have obvious bottlenecks. For example, maybe your client intake process is functional but involves a lot of steps that take up staff and client time (like staff spending a lot of time communicating back and forth with potential clients to seek clarification and get the information necessary to set up a consultation).

For further clarity, consider some of the following typical law office bottlenecks:



While every firm is different, and bottlenecks may vary, focusing on these areas first may help you zero in on areas that are ripe for automation.

Automation change management planning

Once you've used process mapping to identify your areas for improvement and how changes will be implemented, the real fun begins! Now, you can determine which tasks you want to automate.

Remember, while it might be tempting to automate everything at once, it's important to take things slowly. If too much changes at once, you risk overwhelming staff.

After identifying the tasks that you want to automate, consider the following steps to help navigate the change management process:

VALUATE AND PRIORITIZE EACH NEED

Valuating and prioritizing your automation needs is an important consideration when determining which tasks you want to automate.

Think about questions like the following:

- How much time are staff spending on this task?
- How often are you finding errors and mistakes that need revisions?
- How much money are you potentially losing each month by not automating this task?

Ultimately, this step will help you prioritize which tasks should be automated, and when. For example, while you might be tempted to automate your client intake process right away, you might realize that document drafting is creating more pressing bottlenecks and errors in your firm. Thus, depending on your firm's performance and priorities, it will likely make more sense to start by optimizing and automating your document drafting workflow.

RESEARCH YOUR TECH OPTIONS

At this stage, you can start looking at technology that will help you accomplish your automation goals. When you're evaluating tech options, don't just focus on the technology itself—take a holistic approach, considering factors like the following:

- Does the technology offer remote access?
- Does the technology come with ongoing training?
- Does the technology offer professional services to assist you?
- How will this technology integrate with my existing technology?

IMPLEMENT AND REINFORCE YOUR PLAN

Once you've settled on a tech option, it's time to implement and reinforce your plan. As time goes on, remember to revisit the plan and seek feedback from stakeholders to ensure the new process is achieving the desired results.

Tips to consider when evaluating new technology

You've put in the work and made decisions on what you want to automate—now, it's time to gather your tools. But how do you evaluate new automation technology? Consider the following tips to help make informed decisions.

INVOLVE YOUR TEAM IN THE RESEARCH AND EVALUATION PROCESS

Don't assume that you know everything about how processes work in your law firm. Often, we don't know what we don't know, which is why it's so important to involve stakeholders in the research and evaluation process when considering new technology. What might look like a great option to you might be a subpar option for the person regularly performing the task—or, better yet, maybe they've found an even better option that they can bring to the table.

LOOK AT SOFTWARE INTEGRATION AND REMOTE ACCESS

While a particular automation tool might look tempting, it could create even more work for your team if it doesn't easily integrate with your existing practice management software. And, if employees often work from home, it's also important to consider whether the tool offers remote or cloud access.

Clio's cloud-based legal practice management software makes it easy to access your practice at any time and from anywhere. You can also tailor your Clio experience with solutions in the App Directory, which includes practice-area-specific tools and countless automation options.

TAKE ADVANTAGE OF FREE TRIALS WHEN AVAILABLE

Free trials aren't necessarily a requirement when evaluating potential automation tools, but they can help you evaluate the tool without having to commit to a product. With Clio, you can start a 7-day trial of the software for free—no commitment required.

ASK ABOUT AVAILABLE TRAINING RESOURCES AND PROFESSIONAL SERVICES

An automation tool is only useful for your firm if you have the means to set it up and understand how to use it. When evaluating an automation tool, ask what resources are available for setup and training—it'll help ensure that everyone on your team has access to the information they need to make the most effective use of your new tool.

Clio Academy can help new Clio users get the most out of Clio with on-demand training online. Or, if you need more personalized help, Clio's award-winning customer support team and Clio Certified Consultants are ready to help.

IDENTIFY "INFLUENCERS" TO HELP CONVINCE RELUCTANT GROUPS

Let's face it—in an office environment, there will likely be differing opinions about the value of automating certain tasks. Whether it's getting buy-in from the partners or convincing staff of the benefits of an automation tool, you may have to juggle different personalities and expectations. Consider who might be in the best position to help drive initiatives forward while encouraging buy-in—this might be a particularly tech-savvy staff member who can clearly explain the benefits of the technology to stakeholders, or it might be a financially literate staff member who can clearly explain the time and cost savings your firm will enjoy by implementing the new technology (or both!).

CONDUCT REGULAR TRAINING TO ENCOURAGE USER ADOPTION

Once you've implemented your new automation technology, you'll be ready to transform your practice—but don't lose sight of the importance of ongoing check-ins and training. Take the time to regularly check in with stakeholders to ensure the automation technology you've implemented is working for them. Also, take advantage of regular training sessions for employees to ask questions and gain clarification to ensure the technology is being used to its full potential.

Conclusion

In our rapidly changing legal landscape, staying on top of technological advancements is essential for maintaining a competitive edge. Legal workflow optimization and automation can help law firms streamline operations, enhance accuracy, and free up valuable time for more meaningful endeavors. And, by understanding the nuances between optimization and automation, firms can strategically implement new workflows and technology to change their practices for the better.

The journey towards a fully optimized and automated legal workflow begins with introspection. By analyzing current workflows with process mapping, firms can pinpoint their biggest inefficiencies and prioritize change management.

Ultimately, automation isn't just about embracing innovation: it's about empowering law firm staff to spend their time on the things that matter most, whether client relationships, strategy, or even more time off. And, as the legal landscape continues to evolve, those who embrace it will not only thrive but also pave the way for a more agile and responsive legal profession.

About Clio Draft

Clio Draft provides affordable, easy-to-use document automation and cloud-based court form solutions for solo to mid-sized legal practices and legal aid organizations. Save time and avoid errors with documents and forms that you draft over and over again. Access cloud-based versions of tens of thousands of federal, state and local court forms. Convert your existing Microsoft Word Documents into reusable, web-based templates to quickly populate client and matter information in sets of documents and court forms.

Learn more at [Clio Draft]

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