

GETTING ON BOARD WITH DOCUMENT AUTOMATION: WHAT TO EXPECT

PART 2: A GUIDE TO IMPLEMENTING A DOCUMENT
AUTOMATION PLATFORM IN YOUR FIRM

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A GUIDE TO IMPLEMENTING A DOCUMENT AUTOMATION PLATFORM IN YOUR FIRM

[If you've decided on integrating document automation in your legal team, congratulations, you've taken an essential step in leveraging technological advancement – a hallmark of innovative legal practices today.](#)

However, there are several challenges to anticipate when implementing new technology in any firm – namely, obtaining the right support and training to ensure you're getting the most out of your investment.

Once you've chosen a suitable platform, a structured implementation process is the next step in ensuring your firm enjoys document automation's benefits, including cutting down the time it takes to assemble a fully compliant contract by up to 82 per cent.¹

In part 1 of this guide, we covered the basics of how to choose the right document automation solution for your firm.

In part 2, we take you through the process of implementing a document automation solution in your firm and cover these key milestones:

- A snapshot of how document automation works
- Preparing your firm for a digital document automation solution
- Communicating with and training your staff effectively
- What you need for ongoing maintenance

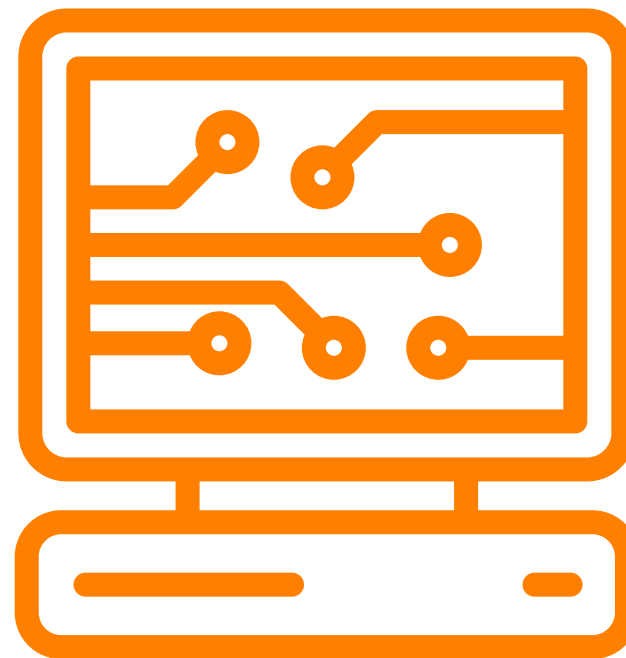
On average,
a lawyer spends
60 per cent of
their time drafting
documents.²

BUILDING STRONGER FOUNDATIONS FOR DOCUMENT AUTOMATION

HOW DOES DOCUMENT AUTOMATION SOFTWARE WORK?

Document automation software works by presenting users with a questionnaire that collects relevant data and guides them through the document creation process. Based on the inputs provided, a master template is automatically populated with the appropriate data and the final document generated by the system.

Some platforms integrate with and automate your existing documents, precedents and forms, while others include their own templates and content that you can customise with your firm's branding.



BUILDING STRONGER FOUNDATIONS FOR DOCUMENT AUTOMATION

COMMON BARRIERS FIRMS FACE IN ADOPTING DOCUMENT AUTOMATION SOFTWARE

While it's easy to see the big-picture benefits of implementing a document automation platform (e.g. increased productivity, lower costs), there are some common barriers to adoption, including:

- a lack of understanding around document automation's benefits and, therefore, less buy-in when it comes to implementing a relevant solution
- resistance to change gives rise to an 'If it ain't broke, don't fix it' mentality
- insecurity about perceived loss of control and the fear that automation will replace jobs

- uncertainty around the time investment required and the hassle involved in migrating to an automated platform
- uncertainty around data security and how information is stored
- insufficient resources to roll-out an automation platform firm-wide, including accounting for IT challenges and planning for scalability.

Firms that manage to overcome these hurdles, however, can reap many benefits.

“Automation is what most professionals have in mind when they think of the relevance of technology for their disciplines.”

Richard Susskind, *The Future of the Professions: How Technology Will Transform the Work of Human Experts*, UK: Oxford University Press, 2015

BUILDING STRONGER FOUNDATIONS FOR DOCUMENT AUTOMATION

BENEFITS YOU CAN EXPECT

Here's a quick look at what your firm can gain by implementing the right document automation solution.

SAVING VALUABLE BILLABLE TIME

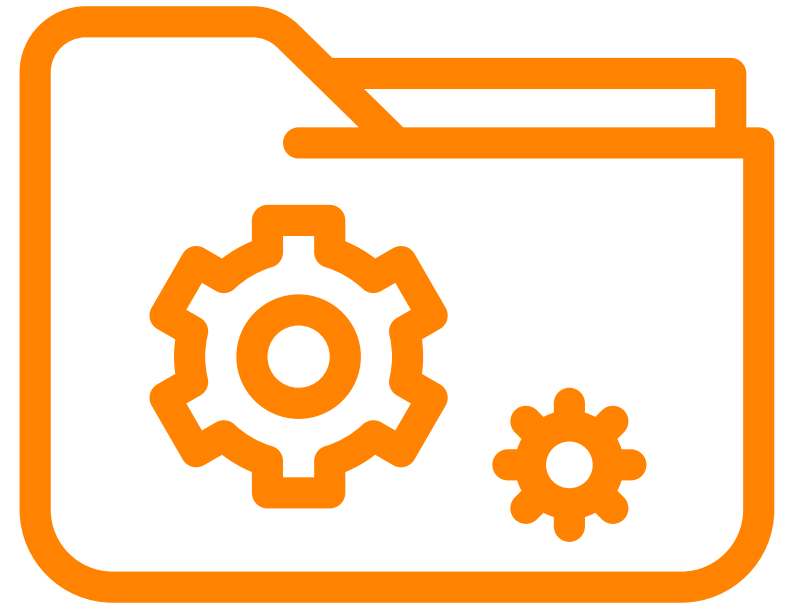
You could save up to 82 per cent of the time it takes to produce a fully compliant legal document¹, freeing your senior employees to focus on higher value work such as client service, business development and operational improvement.

EASIER ACCESS TO HIGH-QUALITY, CURRENT PRECEDENTS AND TEMPLATES

Whether you manage your own precedents or rely on an external provider, document automation enables better access to the most up-to-date forms, providing peace of mind when drafting complex documents.

REDUCED RISK

Get uniformity throughout the documents you produce, reducing the risks associated with delegating paperwork to junior staff members, proofreading and version control.



PREPARING YOUR FIRM FOR A DOCUMENT AUTOMATION SOLUTION

Once you've chosen a software platform that meets all your document automation needs, there are a few basic steps that go into preparing your firm for transition:

UNDERSTAND YOUR GOALS AND WHAT YOU'RE TRYING TO ACHIEVE

Having a clear understanding of what results you're expecting from a technological switch is critical in helping you measure success later. Calculating the cost of manual production – by estimating time savings and translating this into billable time – can help you set realistic goals. Tracking and measuring the effectiveness of implementing a document automation

solution in your firm will offer clarity on time and money savings, which can then be factored into other aspects of the firm's operations.

For example, if document automation has helped you reduce time spent on document assembly work within the first six months, you can better plan for your fee-earners to take on more value-adding tasks over the remainder of the year.

PREPARING YOUR FIRM FOR A DOCUMENT AUTOMATION SOLUTION

THINK ABOUT YOUR ROLL-OUT PROCESS

Whether you're introducing your platform using a phased approach or rolling it out firm-wide, here are some key areas to plan for:

- Identify where it makes the most sense for your firm to start with document automation. Are some documents easier to put together or more often drafted than others?
- Ensure you have the leadership buy-in you need to make the change a success. In an article for the Australasian Legal Practice Management Association (ALPMA), Steve Wingert, principal at consultancy firm Nesso Strategies, said "At the heart of successful change is leadership and management of the goals and process".³

- Involve a select group of users in early testing, if possible, to obtain important feedback before rolling out to other users.
- Identify the policies and processes that will need to be adapted as the platform is rolled out, and what needs to be communicated to clients and staff to minimise disruption.

PREPARING YOUR SYSTEMS

Does your hardware meet system requirements for your preferred software option? Is your new document automation software compatible with existing legacy programs?

It's also a good idea to consider if the automation solution you're implementing will impact how your staff members currently work.

Will it for example, enable more mobility?
How will rolling out the new software impact workers who currently work remotely?

Asking your software provider for help in running a pilot program prior to the roll-out can give you a clear picture of IT gaps and help you address crucial problems faster.

COMMUNICATING WITH AND TRAINING YOUR STAFF EFFECTIVELY

In his ALPMA piece, Steve Wingert noted that up to 70 per cent of change initiatives don't achieve planned results³, but collaboration, engagement and buy-in through communication, empowerment and short-term wins (with a long-term focus in mind) can help mitigate resistance to change.

Training and communication are paramount when you're implementing any new system firm-wide – clear direction on what needs to be done, by when, by whom and how. You can increase the chances of a successful document automation roll-out in your firm by properly addressing training, internal processes and onboarding from the outset.

WHO THE NEW SYSTEM WILL IMPACT AND WHO SHOULD BE TRAINED

Identifying your primary users (e.g. fee-earners, knowledge managers) and secondary ones (e.g. practice managers, administrative, business development and marketing staff) lets you understand how you can prioritise training, and help you work out a chain of communication through implementation milestones.

Junior lawyers, for example, traditionally take on activities like proofreading, document review and research, and may benefit from advanced training compared to basic training that may be adequate for other members of the firm.

It's also important for partners and other leaders within the firm to immerse themselves in the training so they can be first adopters and lead by example.

A reward and recognition system that details what's in it for individuals – such as new skills, opportunities for advancement and participation in strategic goals – will incentivise staff to adopt the new platform and seek training in it.

COMMUNICATING WITH AND TRAINING YOUR STAFF EFFECTIVELY

WHAT DIFFERENT TRAINING OPTIONS ARE ON OFFER

Understanding what types of training are available to your firm also impacts how members will learn and adapt to the new platform, and how you can communicate training initiatives.

It's a good idea to ask your provider about the training options they provide with your software purchase, so you're able to understand how much help you can get, and if there are any gaps you need to fill.

For example, self-paced online tutorials and written guides can be disseminated through email, while on-site workshops and one-on-one coaching will require tighter coordination internally to ensure attendance and effective use of everyone's time.

PROCESS DEVELOPMENT AND TRAINING NEW STAFF

Future-proofing should be a key consideration when adopting any legal software in your firm. As your firm scales and internal processes evolve, consider whether your software providers can accommodate your changing procedures (for example by adding more modules and features) and, if so, will new training be required?

You can also ensure that new joiners are able to hit the ground running sooner if training on your document automation platform is part of the employee onboarding process.

You should also check with your software provider and discuss your options for retraining in the future. If there are a significant number of new employees in your legal team for example, what is the most efficient way to ensure that a large amount of people are brought up to speed quickly? Also, are refresher courses available for existing users down the track?

DID YOU KNOW?

Our research shows only **11 per cent** of small and mid-sized firms offer formalised training for newly adopted technologies.⁴ Only **17 per cent** reported getting the most out of their workflow and research tools,⁵ and **more than three-quarters** claimed lack of technology knowledge translated to wasted time.⁴

WHAT YOU NEED FOR ONGOING MAINTENANCE

To minimise risk and future-proof your choice of document automation platform, it's important to work with your software provider in managing ongoing maintenance issues. These commonly include:

UPGRADES AND PATCHES

Ongoing upgrades and patches ensure your document automation software keeps running smoothly. Upgrades enable you to use the latest technology available, which often contains significant changes or feature enhancements, while patches are incremental updates to software issued on a more regular basis and may do things such as:

- block any security loopholes
- fix any bugs or glitches
- provide drivers for newly released hardware.

Your software provider should be able to inform you when to expect ongoing updates, whether you're able to access training with significant changes, and what you can do if a new upgrade is incompatible with a legacy system used within your firm.

TROUBLESHOOTING

Ensure your staff are aware of the internal and external support available to navigate their way through any problems using document automation software if things don't go to plan.

While most providers offer remote tech support, there are certain IT issues that may be solved more quickly if an Australian tech support team is on hand during business hours. If your provider is able to provide both remote and on-site tech support, then all the better.

“I'm a bit of an island within the practice so I do rely on external support ... We're on the phone to them all the time, and over the years they've worked with us to develop things with our specific issues in mind. Quite often we'll see a new feature or change to the system and say 'Ah! That was our suggestion!'”

Helen Bengel, Operations Manager, Kells
Thomson Reuters Softdocs customer

CONCLUSION

A successful transition to document automation depends on having a clearly defined purpose, communicating the benefits well and empowering all members of your firm to embrace the change and realise the benefits.

To find out how to go about choosing the right document automation platform for your firm, be sure to read part 1 of this series.

Part 1: A Guide to Choosing the Right Document Automation Platform for Your Firm

[READ NOW](#)



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Successful law firms turn to technology to reduce inefficiencies and boost profitability.



Softdocs

Softdocs provides you with a comprehensive set of legal templates across a range of practice areas and jurisdictions. Generate contracts, letters and others documents with speed and precision knowing that your templates are constantly maintained and updated to reflect the latest changes in the law.

[FIND OUT MORE](#)



Contract Express

Contract Express is an intuitive and easy-to-use platform that quickly and accurately allows you to automate and update your legal documents and contracts. Deliver more efficient and compliant legal services, and take your document production to the next level by drafting, negotiating, executing and managing all your firm's documents from one central location.

[FIND OUT MORE](#)

DID YOU KNOW?

By automating your processes, you could **save up to 82 per cent¹** of the time you spend on document production?

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