A Beginner's Guide to Legal Workflow Automation

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Since law firms are service-based, revenue earned in the legal profession is mainly based on hours billed for work on behalf of their clients. These hours include:

- Administrative work separate from client work
- Client Intake
- Billing and collections Practice management tasks.

These are the kinds of tasks and hours that law firms want to maximise, so they can run revenue-driven businesses.

Unfortunately, non-billable hours, like administrative tasks, are a fact of life for any law firm and can take up a significant amount of time per day. And this is where AI and legal workflow automation can help.

What is legal workflow automation?

Legal workflow automation helps law firms automate routine tasks. These processes allow lawyers and staff to focus on strategic tasks (or other areas that require their skills and expertise) and less on routine administrative tasks. With legal workflow automation, law firms can automate anything from billing to document management while reducing errors and decreasing overhead.

Legal workflow automation can increase your billable hours

Non-billable tasks are essential to the maintenance and growth of your law firm. But they also cost money to execute and consume time you could be putting towards earning revenue.

Non-billable tasks are particularly problematic for small firms and sole practitioners who may have fewer revenue streams (than large firms) to offset such expenses.

Non-billables are such a problem that, according to the most recent *Legal Trends Report*, the average lawyer only performs 2.9 hours of billable work each day. That means that compared to a standard 8-hour workday, the typical lawyer only has a 33% utilisation rate. No wonder solicitor working hours often extend beyond 5:00 p.m.

Here's the good news—with today's advancements in law office automation and technology, it's possible to reduce your firm's time on non-billable work. It all comes down to having a mix of priority-based planning, advanced technology/cloud-based apps, and ongoing watchful management.

Will automation replace lawyers?

The short answer is, "no." With law office automation and technology, you're not taking away the human element of the practice. Instead, you'll spend less time on time-intensive, tedious tasks and more time on activities that require your skills and expertise.

Why automate legal workflow processes?

Lawyers can automate a significant portion of their work with current technology. Automation gives your law firm the advantage of servicing clients and attracting new business more efficiently.

Law firm automation can:

- Remove room for human error related to duplicate data entry.
- Create a better client experience when processes they interact with directly are automated or self-service (such as filling out forms).
- Increase solicitor satisfaction because they can spend more time on billable work and other revenue-producing activities.
- Improve communication and transparency between your law firm's staff and clients.
- Decrease the overhead costs of staffing and other fees associated with a conventional law office.

And if you're a sole practitioner or small firm, automation levels the playing field by enabling you to stay competitive on a smaller budget.

6 steps to legal workflow automation

Automating your law firm might come across as an easier-said-than-done kind of scenario, but with the proper steps in place, the transition can be much easier than you think.

Here are six steps to consider when adding new automation technologies to your day-to-day processes.

1. Choose what to automate

The key is to start with one thing at a time. And in particular, start with one thing that you don't like.

2. Evaluate the value of each task

You've created a list of all the things you don't like doing. The next step is to decide which ones are good candidates for automation

- Does it take a lot of time to do?
- Is it repetitive or tedious?
- Or is it a necessary task but non-billable?
- Is it time-sensitive?

3. Create a plan

Once you've determined that there are numerous tasks that your law firm could benefit from automating, create a plan of action so that you're able to tackle changes one by one.

You'll also need to prioritise implementation as part of your day-to-day life without jeopardizing the attorney and client experience. Don't forget to consider the needs of other staff members using these programs—for example, choosing the right software for your paralegals.

4. Research automation tools

Once you've prioritised which processes to automate, conduct research to find the best solution that fits your needs based on your implementation timeline and budget. The Clio App Directory is a good place to start your research.

If you can't find what you're looking for, if-this-then-that tools like Zapier can help you automate actions between specific tools. Additionally, paralegal automation should be prioritised at your firm.

And, of course, there's Artificial intelligence (AI). According to our research, 96% of firms currently have adopted AI in some way. It may not be explicitly noticeable—but it helps lawyers and paralegals do their jobs better. Specifically, AI in law firms helps legal professionals transform their practice by putting clients first in an unprecedented way.

By using the document automation tool, legal professionals can:

- **Increase workflow efficiency** by generating multiple automated documents simultaneously and sharing knowledge across stakeholders with web-based documents.
- **Increase matter accuracy** by populating and editing details throughout several documents from a centralised platform.
- **Increase their time with clients** instead of spending it on the manual processes of document drafting.

5. Develop a change management plan

Technological change can be uncomfortable and intimidating for your staff, so ensure they are aware of the plan and have the proper training for the easiest transition. It's always better to communicate change early.

6. Review and iterate

Although one of the advantages of implementing automation is that you can "set-it-and-forget-it," you should regularly re-evaluate your processes over time. There is plenty of opportunity for customisations using automation tools, and each vendor will offer unique features, so never be complacent with your technology.

Also, regularly asking for feedback from staff and clients will help you uncover valuable opportunities for improvement—and further savings on overhead.

Final notes on legal workflow automation

Legal workflow automation technology provides limitless opportunities when it comes to helping you save time on key law firm processes, like client intake, document automation, client communications, payment collections, client reviews, and more.

By optimizing these areas, you'll be able to spend less time doing non-billable tasks. And, you'll spend more time creating revenue for your law firm.

Create a solid plan and take a step-by-step approach to integrate new automation technologies. Then, you'll be set up for success.

So, take advantage of those automation tools. You'll achieve efficiencies that will help you deliver better experiences for both clients and a better work environment for attorneys.

For more information, watch our webinar on how to use automation to increase efficiency at your law firm.

About Clio

Clio is the global leader in legal AI, powering legal work across the profession, from law firms of every size to corporate legal teams, government agencies, and courts. Its Intelligent Legal Work Platform unites the business and practice of law, connecting the people, information, and processes behind legal work. Clio's AI brings the context together with legal sources drawn from Clio Library, a growing collection of more than one billion legal documents. Over 400,000 legal professionals in more than 130 countries rely on Clio to run their legal world. Learn more at www.clio.com.