

MITRATECH

Ready for Document Automation?

Your Next-Step Preparation Checklist



Introduction

The hours spent drafting documents from scratch, reviewing countless versions for minor errors, and manually inputting information add up – and could be better spent on business initiatives that propel your organization.

The right technology is built to help transform your regularly used documents and forms into intelligent templates and streamlined workflows so you can **hit your targets** instead of obstacles. A contract that once took hours to prepare can be assembled in minutes, with fields automatically populated and fewer chances for errors. More importantly, your team can shift their focus from mundane documentation tasks to driving greater value, while the automation handles the repetitive, time-consuming work.

It's a pretty picture – but where do you start? This checklist can help you determine if you need (and are ready for) a **document assembly and automation software**.



1. Identify High-Volume Document Processes

Start by pinpointing areas where documents are created frequently and manually. For example, legal and sales contracts, HR records, risk assessments, and more. Think of the things that are piling up in your inbox that makes it feel like an endless pit. These routine tasks are ideal for automation, helping to reduce human error and streamline operations.

Ask yourself:

- How many high-volume or recurring document generation needs are we dealing with?
- Are there specific processes where errors or inconsistencies are common?

2. Assess Current Workflow Efficiency

Next, analyze how much manual effort goes into the document-related tasks you identified in step 1. Inefficient workflows might be slowing down your team, and automation can free up time and resources for more critical activities that drive progress forward.

Ask yourself:

- How many hours a week do our employees spend manually drafting and editing documents?
- Are our current workflows causing stakeholders and customers to be waiting on drafts, reviews or approvals of documents?



3. Evaluate Document Complexity

Sometimes just the thought of certain documents can be headache-inducing. That's probably your first indicator that you're dealing with complex documents with multiple variables or conditional logic. These can be cumbersome to manage manually, leading to more time and resources spent. Automation simplifies this by allowing you to generate dynamic documents efficiently.

Ask yourself:

- Do our documents contain dynamic data fields that require frequent updates?
- Are complex clauses or conditional logic used in your contracts or other legal documents?

4. Understand Your Integration Needs

Take a look at your tech stack and consider how your current ecosystem needs to connect with the addition of a document automation tool. Integrations ensure a smoother transition and reduce the need for manual data entry.

Ask yourself:

- Do we need document automation software that integrates with our existing tools (e.g., CRM, ERP, CMS)?
- Can our current systems support automation without any major upgrades?





5. Review Security & Compliance Requirements

For businesses dealing with sensitive data, compliance with regulations is essential to avoid costly errors both financially and reputationally. The right automation tools will have built-in security features to maintain data privacy and meet legal standards.

Ask yourself:

- Does our business handle sensitive or regulated data (e.g., legal, financial, healthcare)?
- Are we prepared to ensure compliance with data protection regulations (e.g., GDPR, HIPAA)?

6. Prepare For User Training & Adoption

Introducing new technology requires preparing your team. Having an effective training program already in place along with consistent communication will ease the transition, ensuring employees embrace the automation tool rather than resist it.

Ask yourself:

- Do you have a plan for training employees on how to use new software or will you need a document automation expert to get you started?
- Is your team open to adopting new technologies that easily transfer and update your templates in a new system?

7. Define Success Metrics

Before bringing a new tool to your tech toolbox, determine how you'll measure the impact of automation. Whether you're looking for faster turnaround times, reduced errors, or cost savings, clear metrics will help track performance and justify the investment.

Ask yourself:

- How will you measure the success of document automation (e.g., time saved, reduced errors, cost efficiency)?
- What key performance indicators (KPIs) are important for tracking ROI?

8. Consider Scalability

The best investments are ones that grow with your business. What does your future business look like in a year? 5 years? 10 years? The right document automation tool will be able to handle growth, whether that means more users, increased document volume, or expanded functionality.

Ask yourself:

- Will the solution we choose be able to scale with our business as it grows?
- Are we looking for a tool that supports multiple departments or global operations?



Ready for Automation: Setting Your Business Up for Success

Integrating document automation into your business is a strategic move that can significantly enhance efficiency, reduce errors, and allow your team to focus on higher-value tasks. By following this checklist, you'll be able to assess your organization's readiness for automation and address key considerations before implementation.

As you prepare to streamline your document processes, take the time to ask the right questions and plan for successful adoption. With the right solution in place, you'll set your business up for long-term success, enhanced productivity, and scalable growth.

Ready to take the next step?

Connect with our team to discover how Mitratesh HotDocs can propel your organization towards elevated efficiency. to elevate your legal team's success.

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ABOUT MITRATECH

Mitratech is a proven global technology partner for corporate legal, risk & compliance, and HR professionals seeking to maximize productivity, control expense, and mitigate risk by deepening operational alignment, increasing visibility, and spurring collaboration across their organization.

With Mitratech's proven portfolio of end-to-end solutions, organizations worldwide are able to implement best practices and standardize processes across all lines of business to manage risk and ensure business continuity.

Mitratech serves over 20,000 organizations worldwide, spanning more than 160 countries.

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