

Selecting Your Legal Document Automation Software:

9 must-ask questions to help you make
the best decision for your practice





Introduction

Attorneys and legal staff have traditionally spent too much time preparing and updating motions, probate forms, civil litigation filings, and thousands of other legal documents. Until intelligent document assembly and automation software enters the picture, that is.

But not all legal document generation systems have the robust feature set and configurability to ensure the efficiency, precision, and reliability needed to meet the demands of today's lawyers.

Let's dive into the features of world-class document automation – and their details – so you can determine which are most important when selecting your document generation software.

Legal document automation, or the process of taking the documents you use every day and converting them into time-saving templates, must be effective in 9 key areas:

1. Questionnaires
2. Conditional logic
3. Storage
4. Integrations
5. Customization
6. Bulk generation
7. Flexibility
8. Calculation skills
9. Lists or repeats

Questions to consider when selecting your legal document automation software



1. Are the available questionnaires static or dynamic?

A static questionnaire presents a fixed set of questions that cannot be changed or concealed, even if a question is irrelevant. A dynamic questionnaire, however, automatically updates itself based on how prior questions were answered, giving much more flexibility and a better user experience (especially for documents with intricate decision trees).



3. Does it provide the ability to store and reuse questionnaire answers?

During a case or engagement, multiple documents may need to be generated from many different templates. To help eliminate redundant data entry, your document automation solution should save your responses so that you can reuse them in future documents.



2. Can it handle conditional logic?

It is essential that your document automation platform can perform conditional logic. This enables the inclusion or exclusion of text based on business rules. When you generate complex documents, your document automation solution should also be equipped to handle nested logic, a sublogic contained within larger, optional segments of the document.



4. Can you pull information from other databases into the document?

Another way to minimize duplicate data entry is through the powerful integrations offered by an open API. The automation solution you choose should have the ability to connect to your business-critical platforms, and effortlessly pull existing information into your questionnaire.





5. Can you add help text to the questionnaire?

If you want the ability to present users with additional details or guidance, then you need the ability to provide question-specific help text. This feature is particularly useful for teams that are new to document automation.



6. Can it generate multiple documents from one questionnaire?

The need to generate a set of documents that use the same information in various ways is common. Your document automation solution should be able to generate multiple documents to your exact specifications, at once.



7. Do you have flexibility with the types of questions presented?

When gathering the information necessary to generate a document, a system should offer options for the following types of inputs: true/false, multiple choice, text, date and number. True/false questions present yes or no options. Multiple choice questions should allow options for selecting only one option or all that apply.





8. Is it able to calculate results?

The ability to calculate results empowers you to automate even the most complex documents with a minimal error margin. The most powerful document automation solutions can calculate almost anything based on inputs, making the assembly of complex documents faster and more efficient. At a minimum, your document automation solution should be able to calculate text, dates, or numbers based on previous inputs. For example, if a questionnaire identifies a party as male, it should automatically calculate and insert he/his/him pronouns.



9. Can it gather and process lists or repeats?

All legal documents have parties and, in most cases, more than one party. Lists or repeats enable the user to enter an unlimited number of records. Additionally, your platform should be able to calculate things based on the number of records entered. When automating an estate planning document, for example, the platform should be able to manage lists of children, executors/PRs, beneficiaries, guardians and trustees.

**Ready to automatically generate legal documents
with efficiency, precision, and reliability?**

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