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A Practical Framework for Spotting Strong Automation Candidates

From the session "Where You're Leaving Value on the Table with Document Automation" with Gene Turner (LawHawk), Casey Headley (Mitratech), and Aleisha Starnes (Bowhead Specialty)

Most prioritization advice says, "automate high-impact, low-complexity documents first." That's fine as far as it goes, but it misses where the value actually leaks. Rank your backlog on two better axes:

Frequency of use

How often the document is actually drafted, and by how many people.

Total drag removed

Not just drafting time, but the friction around it: manual intake, rekeyed data, email approvals, untagged signing, and lost documents.

The quadrants

Plot your backlog, then fill in your own candidates below.

TOTAL DRAG REMOVED — LOW → HIGH

LOW FREQUENCY · HIGH DRAG

Package and batch candidates

Automate as a set, driven by one interview (e.g., a lending or transaction pack).

HIGH FREQUENCY · HIGH DRAG

Automate first

This is where weeks of time hide. Fix the document and the workflow around it.

LOW FREQUENCY · LOW DRAG

Defer

Revisit when the top two quadrants are done.

HIGH FREQUENCY · LOW DRAG

Fast simple wins

Templates built in minutes, used all day (see the Start Simple flyer).

FREQUENCY OF USE — LOW → HIGH

Score each candidate (1–5 on each)

1. Value

Labor saved + risk and error reduced + who benefits downstream.

2. Effort

Template complexity + integration required + data availability.

3. Readiness

Is the underlying process sound, agreed, and stable enough to automate?

Two traps to avoid

Prioritizing by who shouts loudest

The most visible request is rarely the most valuable one. Score everything the same way.

Automating a broken process

If the readiness score is low, fix the process first. There's no point in automating a bad process.

Worked examples from this room

Insurance

State-specific declination, disclosure, and surplus lines forms; high frequency, high drag, and ideal for auto-selection so staff never pick the wrong form.

Energy, utilities, and real estate

Recurring notices, valuation reports, and standard agreements; high frequency, often low drag: fast wins.

NEXT STEP

Bring your top three candidates to our panelists to pressure-test the scores — and find the ones you've ranked too low.

About Gene Turner

A lawyer for 29 years and former corporate and finance partner at Buddle Findlay, Gene has worked with document automation since 2000 and has spent more than a decade implementing HotDocs across legal teams of every size. Fellow, World Commerce & Contracting.

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