MITRATECH

The Mitratech Guide to Legal Workflow Automation

Learn the benefits, adoption secrets and amazing future of digital process transformation.

Table of Contents

01 Overview: Why Legal Workflow Automation?

Workflows are the most fundamental components of how any organization operates. The most basic definition of a workflow? An orchestrated repeatable series of tasks involving people and process, driving to a desired outcome. Or, to put it more simply:

"If this then that"

The "repeatable" aspect of workflows is what often inflates costs, frustrations and dire consequences for an enterprise, especially a legal department or a law firm. Simple human error will inevitably produce hiccups in repetitive processes, whether it's a misrouted contract, an incorrectly completed form, an un-archived NDA or other snafu.

The "repeatable" aspect of workflows is what often inflates costs, frustrations and dire consequences for an organization.

These numbingly routine processes also wear down the morale and commitment of the people having to carry them out. As John Stuart Mill pointed out:

"The disease which inflicts bureaucracy and what they usually die from is routine."

If repeatable actions are digitized and automated – and thus made faster, less prone to error or delay – it obviously raises the overall performance of the enterprise and the people within it.

Delivering improved services

Automating workflows can have a positive effect on legal services delivery and client experience, enhancing how a client, stakeholder or other member of the "legal ecosystem" engages with legal operations..

Whether that's by accelerating the speed at which they receive service or by making their interaction with legal processes more enjoyable and efficient – say, via online, self-guiding automated forms – a key goal of legal workflow automation ought to be to upgrade those experiences, not just create internal efficiencies.
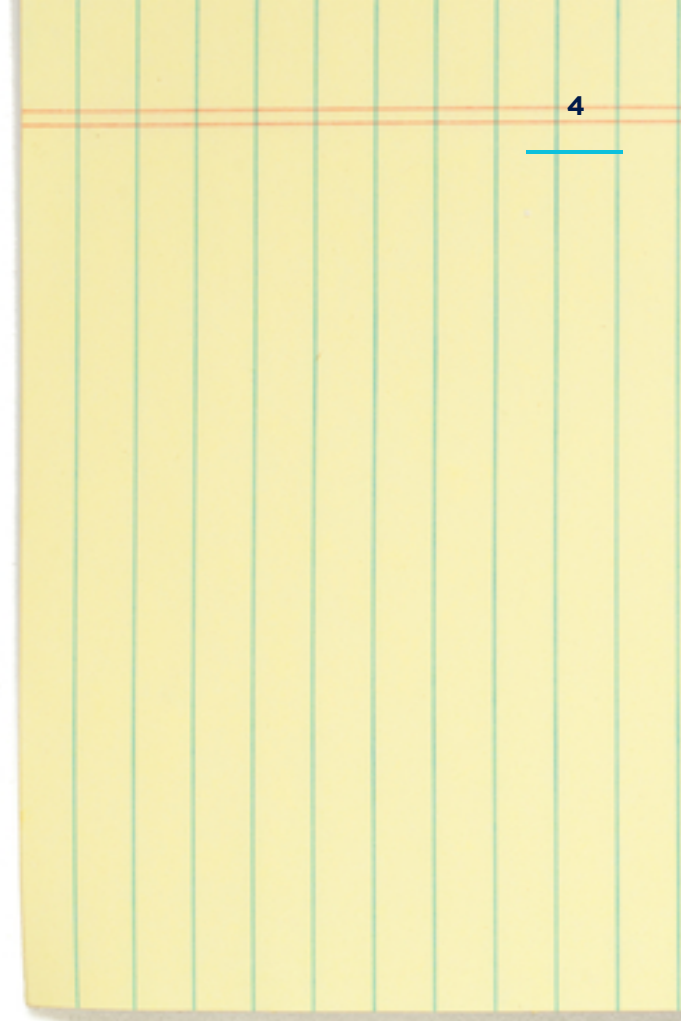
Automating a more efficient enterprise

Today's most advanced legal workflow automation platforms make it simple to streamline repeatable processes which have previously been manual and paper-based, enabling people to work more efficiently, save time and cut costs. This delivers a far more efficient confluence of the **people, processes and content** that power any organization.

Across nearly any legal operations department or law firm, you'll find high-value opportunities to automate workflows. The typical drivers for that transformation?

- Risk exposure, liability and the need to reduce both.

- Compliance and high stakes, with penalties for mistakes / delays.

- High frequency, repeatable processes with numerous steps that are vulnerable to frequent errors.

- The need to scale up high-volume processes by making them faster and easier.

- Competitive and customer pressures to deliver greater agility.

People
Multiple Roles
Approvals
Routing
Collaboration

Content
Forms
Documents
Templates
Communications
Alerts
Notifications

Process
Design
Build
Iterate
Publish

Evolving toward efficiency & ROI

Legal workflow automation has been propelled forward by a sustained impetus toward higher efficiency at reduced cost, driving a better return on investment. The most advanced solutions, based in the Cloud, have maximized that outcome.

It's a generation of software that's a major step forward from last-gen enterprise software products. A legal department may have already attempted workflow automation using those applications and found itself disappointed by their lack of flexibility, difficulty of use, failure to produce sufficient ROI, and other hurdles.

SaaS legal workflow automation platforms have been able to provide the ease of adoption, integration and use, agility, and lower cost that finally make automation possible for a much wider range of law firms and legal operations departments, from large to small.

Workflow Evolution & Potential ROI

In broad terms, practically all law firms or legal ops teams are at some point on the progression below when it comes to how they manage work processes.

Work automation is increasingly essential to legal processes

In this guide, we'll explore exactly what the benefits of legal workflow automation (LWFA) are, the distinctions between different types of LWFA and various adoption considerations, as well as the future of legal workflow automation as technologies evolve.

Understanding the full potential of legal workflow automation is vital. The pressures to become more efficient, agile and proactive are only intensifying, and LWFA is a key means of meeting them. Knowing how to put it in place, and how to use it as a cornerstone of a more complete digital transformation of legal operations? Those questions are just as important.

Understanding the full potential of workflow automation for your enterprise is vital.

02 Benefits of Legal Workflow Automation

No technology or new approach is going to be adopted by any organization unless it offers tangible benefits. In the case of legal workflow automation, the enhancements and efficiencies it creates are truly transformative for everyone involved, to use a word that's often misapplied or tossed around as hyperbole. In this case, it's strictly accurate, and the benefits of LWFA make that clear.

No technology or new approach is going to be adopted by any organization unless it offers tangible benefits.

ROI

What constitutes "ROI" for a specialized law firm versus a corporate legal operations department may vary, but the need to maximize it still holds true for both:

- There's a need to keep pace with the increased pace of business, and to be proactive, not reactive, in handling risk, compliance and other matters.

- Legal departments and legal service providers are constantly challenged to do a better job of delivering more service, yet at lower cost.

    LWFA can reduce the time and cost of completing a legal process by **20% – 45%** or even more. Since most of what happens in almost any organization, whether a business, NPO or governmental body, involves repeatable processes, the productivity implications are huge.

In fact, a 2015 report by Forrester Research pegged the ROI of a workflow automation solution at **176%** over three years.

The obvious benefits come in terms of "hard ROI" – reduced costs. One example:

- Based on actual user data, the average cost (in employee time) of completing a non-disclosure form (NDA) using paper-based workflows was determined to be **$129.81.**

- Using legal workflow automation, NDA completion time is cut by 95%, so an average NDA process becomes 20X faster, saving **$123.34 per workflow.**

> Workflow automation can reduce the time and cost of completing a process by 20% – 45% or even more.

- For a large organization processing 25,100 NDAs per year, the **savings in labor costs alone amount to $3.1 million per year.**

- Even a smaller enterprise processing 1,000 NDAs (or similar forms) per year would see savings of **$123,340.**

Other examples of "hard ROI" driven by legal workflow automation can include reduced materials and logistics costs, reduced IT and infrastructure costs, quicker revenue as services are delivered faster, reduced client churn, and reduced staff time as self-service workflows take over certain tasks entirely.

Beyond hard ROI, there are other returns to bear in mind:

- **"Soft ROI"** from improvements in customer and employee satisfaction may be harder to quantify, but can be just as important. Those can include increased agility in responding to requests or issues, improved collaboration (internally and externally), and heightened morale and employee retention.

- **Risk mitigation** is a form of ROI, owing to better compliance with constantly-shifting regulations, improved resiliency and disaster recovery through automated archiving, and enhanced data security as paper-based processes are replaced with more secure, encryptable digital documents and workflows.

Quicker T2V

In evaluating any process technology platform, though, a would-be adopter should think outside the ROI box. Another metric that's just as important: Time-To-Value, or T2V.

Time-To-Value is a measurement of **the time it takes to realize returns** on your LWFA investment. The benefits of faster payback should be obvious: the sooner you're past the break-even point, the sooner you begin profiting from adoption.

In the example below, LWFA Platform A has a much better T2V than B, so break-even is reached and surpassed far sooner.
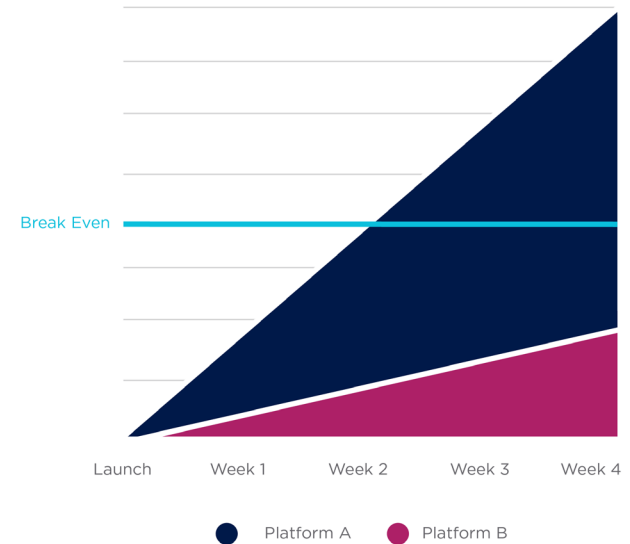
Optimization & Efficiency

Optimizing processes and eliminating inefficiencies large and small is a big component of legal workflow automation ROI and T2V, obviously. Better efficiency can be gained almost everywhere, and the opportunities aren't always obvious until one adopts a "macro" perspective on operations.

What are just a few of the costs associated with non-automated workflows?

- **Costs of document filing:** According to Iron Mountain, organizations **spend 5% of their budgets** on filing. For instance, it costs $25,000 in labor and materials to fill a four-drawer file cabinet, and another $2,000 to maintain it every year.

- **Costs of recovering documents:** PricewaterhouseCoopers estimates finding a lost document will cost a company $122, on average, and $220 to reproduce. Worse yet, **7.6% to 10%** of all company documents are lost or completely misfiled.

- **Costs of locating crucial information or data:** IDC found that professionals using paper-based workflows spend **up to 35-50%** of their time searching for information because of the lack of a centralized index or asset repository.

Professionals using paper-based workflows spend up to 35-50% of their time searching for information.

- **Costs of misplacing approvals:** JAMA Surgery estimates that 10% of surgeries are delayed due to missing consent forms, which can cost a hospital upwards of $500,000 a year.

Even in the face of these costs, in virtually every type of organization you'll find departments or teams working with processes that are:

- Confusing to the uninitiated

- Paper-based or Excel-based

- Subject to high failure or incompletion rates

- Non-standard and lack controls

Drastic consequences can arise just for losing an important document, and even slight mistakes caused by human error and confusing paper forms can balloon into costly delays. Non-expert employees are often asked to complete every stage of complex workflows, yet don't know the implications and consequences of an error, or simply aren't familiar with the required steps and paperwork.

Automation Efficiency Examples

How does legal workflow automation optimize repetitive operations?

- For instance, if an employee making $50/hour writes 5 notification or update emails a day, even if they finish them all in only half an hour, it still adds up to **$6,000 a year** you're paying one person to send manual notifications.

- Imagine the costs involved at a larger firm where 20 or 100 staffers are doing it.

- Those notifications can be automatically generated and sent by a LWFA solution, which will do so more consistently and accurately than individuals, with no need for manager oversight.

LWFA also helps an organization optimize how it deploys counsel and higher-paid staffers. Since it allows self-service access on the part of many users and standardization and quality control across legal processes, it eliminates the need to have senior staffers involved in costly engagements with a given process:

Workflow automation also helps an organization optimize how it deploys managers and higher-paid staffers.

- A 2011 study by LegalFutures found that taking instructions and drafting one of three types of common legal document manually required an average of 86 minutes, but an automated solution **could save 46 minutes**.

- By manually producing just three documents a week, a senior attorney could be **wasting $1,350 per month** in lost billable time versus using automation.

Efficiencies can include improving employee engagement, as well:

- According to a ThinkMoney survey, employees **waste 759 hours per year** due to workplace distractions. Their reasons for losing focus? A lack of challenge, poor job satisfaction, and sheer boredom caused by tedious and repetitive tasks offering no incentive or gratification.

The efficiencies and savings in supplies and materials can be impressive, too:

- The costs of using paper in the office can be **13 to 31 times the cost** of buying the paper in the first place, yet a single average U.S. office worker uses 10,000 sheets a year, according to Reduce.org.

- According to *The San Francisco Chronicle*, printer ink costs more per ounce than a bottle of Chanel No. 5 (and it sure doesn't smell better).

Employees waste 759 hours per year due to workplace distractions.

Quality of Process & Workflow Product

When human error and workflow delays are minimized or eliminated altogether, the quality of the process and the work it delivers are both improved. That provides a better experience for everyone: internal team members and clients and stakeholders alike.

The result: higher completion rates and process success for even complex workflows.

What drives that improvement?

- With workflow automation, employees, clients and stakeholders alike can stay on track as tasks, milestones and necessary assets are set and automatically enforced by the workflow. So, the work stays aligned with best practices and any compliance requirements.

- LWFA takes over repetitive tasks, and eliminates redundancies and waste. This allows participants' time and resources to be better targeted to those stages or tasks where they'll deliver the best outcomes.

- It gives managers the ability to match workflow tasks with staffers who have the right skills for those tasks, rather than assigning work just on the basis of availability.

- LWFA software can monitor progress at every step of a workflow, such as when smart forms flag their completion (or incompletion). Centralizing governance auditing and providing workflow analytics allows legal management to continually refine and improve processes.

Improving the quality of "work product" can be a life-or-death concern for an enterprise and its customers alike. A 2006 review of healthcare providers who had installed workflow automation found that not only were there expected benefits like time savings, reductions in staff stress and improvements in morale, but the actual quality of care being given to patients had improved.

Standardization

A challenge for legal departments that rely on manual process models? Enforcing standardization. Thanks to human error, a lack of internal controls or other factors, critical processes don't stick to any consistent rules to guide their effective completion.

Legal workflow automation, however, has standardization and consistency "baked in" from the start, so standards are adhered to; work product that follows best practices is replicated, time after time.

For example, a workflow can be designed using conditional triggers, so tasks and notifications are activated by specific, pre-designated events – not by human beings being asked to simply remember to follow-through on each stage of a project. Here's how that works in the world of customer/client support:

- When a customer/client uses a self-service form to enter a support request, support staff are automatically alerted by email or SMS to resolve the request.

Legal workflow automation, however, has standardization and consistency "baked in" from the start.

- An email notification is automatically generated and sent to the customer, letting them know that customer support is working on their request.

- Within the system, the customer's status is flagged and monitored to ensure managers know what's going on.

- The entire process' stages, milestones and timing are standardized by the LWFA platform, eliminating any opportunity for human error, inattention or fudging with tasks or deadlines.

Governance & Compliance

Following internal mandates and external legal or industry requirements and regulation? It can be complicated and confusing, yet failing to do so gives rise to risks.

They're the kinds of risks that are serious enough for smaller firms. For growing or global concerns, they're incredibly problematic, and expensive. 58% of large companies responding to a 2015 survey by global consulting firm Protiviti said they'd **spent more than $1 million annually** on Sarbanes Oxley (SOX) compliance, and that costs were continuing to escalate.

But with a workflow automation solution:

- **Employee actions** are recorded and auditable.

- **Important data** is safeguarded and role-restricted.

- **Process governance** is enforced for all stakeholders in any given workflow.

- **Certification processes** can be streamlined (such as an ISO 9001 QMS certification for professional services or manufacturing).

- **Alerts notify project owners** when a process is out of sequence or stalled.

- **Workflow analytics** allow management to monitor compliance, even across a far-flung organization.

- **Automatic archiving** of hundreds or thousands of workflows creates huge savings in maintaining compliance records mandated by SOX or other regulations.

58% of large companies surveyed spent $1MM+ annually on SOX compliance.

Document Centralization & Accessibility

There's no such thing as a "centralized database" in the paper-based work- flow world. Compared to automated environments, especially if they're Cloud-based, old-school processes look Dickensian, with reams of forms buried in file cabinets and e-documents stored in remote servers within labyrinths of folders.

On-premise systems may only offer a slight improvement, since documents, assets and workflow templates are often isolated in individual servers or silos and unavailable to the rest of the enterprise.

SaaS LWFA platforms, on the other hand, make documents and assets accessible across from across the entire enterprise, and from any device:

- Cloud-based legal workflow automation uses a single unified database of record accessible through the Cloud, centrally storing all documents, forms, client and stakeholder communications, workflow records, images and other assets, so they're readily obtainable and never lost.

- When it's Cloud-hosted, redundant backups make disaster recovery far simpler than it would be if a paper-based archive was damaged or destroyed.

- Accessibility is optimized, so stakeholders can do their jobs anywhere, anytime by engaging with workflows, forms and data using any desktop or mobile device

Data Quality

In any business, you thrive or suffer based on the quality of the data you have on hand. Legal operations is no exception. And the bigger the data-base, the greater the opportunity for error.

A survey by Demand Gen Report found 85% of respondents admitting they knowingly ran CRM processes using 10 to 40% bad data.

To prevent data debacles like this, workflow automation can be a key tool in ensuring data is valid and actionable in the first place:

- Standardized processes can be designed to capture quality data, especially by using self-service forms These "smart" forms guide users through entering accurate and complete data at the head end of any workflow, preventing poor or incomplete information from entering the system.

In any business, you thrive or suffer based on the quality of the data you have on hand.

- Since legal workflows operate automatically, there are far fewer points where faults (typically caused by human beings) can creep into your data.

- They allow you to automatically streamline data between different platforms, such as a timesheeting and an ebilling program, to automate accurate invoicing.

- It also simplifies searching for, retrieving, and storing data. Databases can be made complete, cohesive and compatible across the entire department or organization, especially when accessed and updated using the same centralized platform.

Agility & Responsibility

Being agile and adaptable to changing challenges and conditions is more essential than ever for nearly any legal team, and even those working in the government and public sectors are feeling the heat, too.

A big part of that? Delivering exceptional responsiveness to client demands in an era when much of the balance of power has shifted from the company to the client. They'll happily discard one provider for another if they feel they're not getting the service they deserve, even when it comes to legal services.

- A Net Promoter® Score (NPS) 2018 survey of client satisfaction in the legal industry saw ratings in decline for the fourth straight year, **dropping from 32% NPS to below 20% NPS**, implying legal service providers are struggling to meet and exceed clients' service expectations.

B2B and professional services customer Increasingly look to automated self-service solutions to improve responsiveness:

- Zendesk found **53% of consumers** feel it's important for them to resolve their own product / service problems, rather than rely on customer service representatives.

- Research by customer service expert/author Steven Van Belleghem found that **70% of customers** expect a company website to include a self-service application for making requests or resolving issues.

By building online self-service forms that trigger automated workflows, legal departments can accelerate response times for dealing with customer/client concerns and requests.

Zendesk found 53% of consumers feel it's important for them to resolve their own product / service problems, rather than rely on customer service representatives.

Collaboration

Today, employee alignment, collaboration and engagement is a primary concern for organizations, and that includes legal departments and law firms:

- A survey by Fierce, a global employee development firm, found **86%** of employees and executives cite lack of collaboration or ineffective communication for workplace failures.

- But in 2016, Gallup found that **only 32%** of U.S. employees feel engaged with their jobs.

And manual workflows and mundane processes are among the chief culprits:

- A ServiceNow study found that managers spend an average of **2 days a week** on administrative tasks, preventing them from doing strategic work.

- Four out of 5 said these routine processes caused significant delays.

- Three-quarters of them wanted "simple, self-service support processes that are as easy to use as Amazon or FedEx."

86% of employees and executives cite lack of collaboration or ineffective communication for workplace failures.

Successful organizations elevate collaboration and engagement by eliminating waste and distraction and optimizing communication, making employees at all level feel they're being utilized productively.

By empowering that higher level of collaboration, LWFA frees counsel, employees, clients and stakeholders to focus on higher-value work, helping them be more productive.

Unintended (Positive) Consequences

When workflow automation is implemented, it's not uncommon for an organization to reap benefits it hadn't expected. Some of those?

- Better morale: Legal firms that have deployed wor flow automation have seen employees, especially millennials, gain a more positive view of the organization, as younger attorneys feel they're being supported by their firms and made part of a collaborative team.

- Reduced stress: the law can be a high-pressure profession, as a survey by the U.K.'s Law Society found that **60% of stressed solicitors** claimed volume of work as the source; 42% cited client expectations. When the ABA and Hazelden surveyed nearly 13,000 attorneys, they found over 20% screening positive for hazardous, harmful, and potentially alcohol-dependent drinking; 28%, 19%, and 23% had experienced symptoms of depression, anxiety, and stress, respectively.

- Improved talent recruitment and retention: Workflow automation also satisfies workers' desire to use updated tools. In a 2016 study by Adobe, **81% of U.S. office workers** ranked technology as being one of the most important factors in keeping them happy at work, ahead of glitzier perks.

- Stronger client & customer ties: Teams have been able to establish stronger ties with clients and customers once repetitive tasks have been streamlined, removing burdens on all concerned. At law firms, for instance, examples have included more attorney/client partnering on pro bono work and greater transparency in budgeting and forecasting thanks to automation tools, both helping with client retention.

- Job creation: This has occurred as firms have movedtech-heavy jobs in-house, and have added staffers to manage and customize tech tools to fit specific needs. By creating in-house roles, creation and deployment of these solutions is accelerated, equaling better collaborations with clients and end users.

03 Types of Workflow Automation

In bringing legal work automation to the workplace, there are multiple ways in which it can be applied. LWFA is not, though, a panacea for all the efficiency problems that may afflict an organization. As Bill Gates put it,

"The first rule of any technology used in a business is that automation applied to an efficient operation will magnify the efficiency. The second is that automation applied to an inefficient operation will magnify the ineffciency."

It's useful to understand the four different areas where a legal department or law firm can automate various components of its operations under the overall umbrella of "workflow automation."
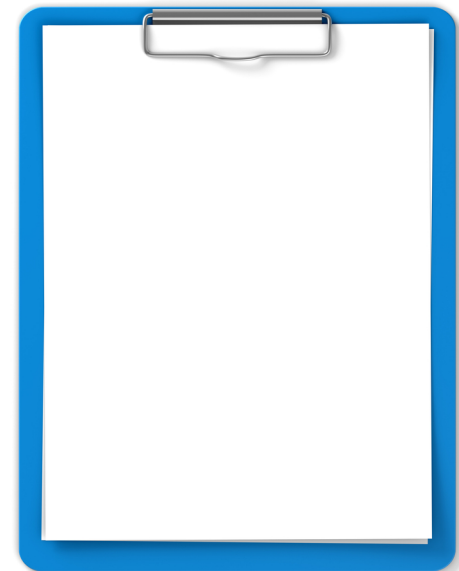
Forms Automation

The term "enterprise forms automation" was first coined in the mid-1990s, according to Wikipedia, and refers to using systems for designing, managing, distributing and processing the forms filled out by various users, whether they're clients, vendors, employees or others. Often, they're meant to replace paper-based versions.

Sometimes, this can be done on a very limited scale – for the legal operations department that's looking to automate NDAs, for instance, with online self-service forms – or it can be extended across an entire enterprise as part of the pursuit of a totally paperless office.

A few of the features that should be incorporated when applying Forms Automation to legal operations:

•   The solution employed allows digitization of existing forms into digital formats, such as PDF.

•   "Smart" forms can be designed which are dynamically populated with necessary fields and instructions, as needed.

- The Forms Automation system contains or integrates with the databases required to autofill those forms.

- Multi-language support is embedded in each form, so users can view form fields and instructions in the language of their choice (and designers avoid having to create multiple versions of each form).

- Centralized, standardized templates for often-used forms are housed for easy retrieval.

- Two-way messaging between forms and systems is enabled during submission and validation stages.

- Forms that are in-process or partially complete can be saved for later retrieval and completion.

- Electronic signature platforms are integrated, digitally capturing approvals with a high degree of security.

- Centralized oversight, management and auditing of forms and form-based processes is included.
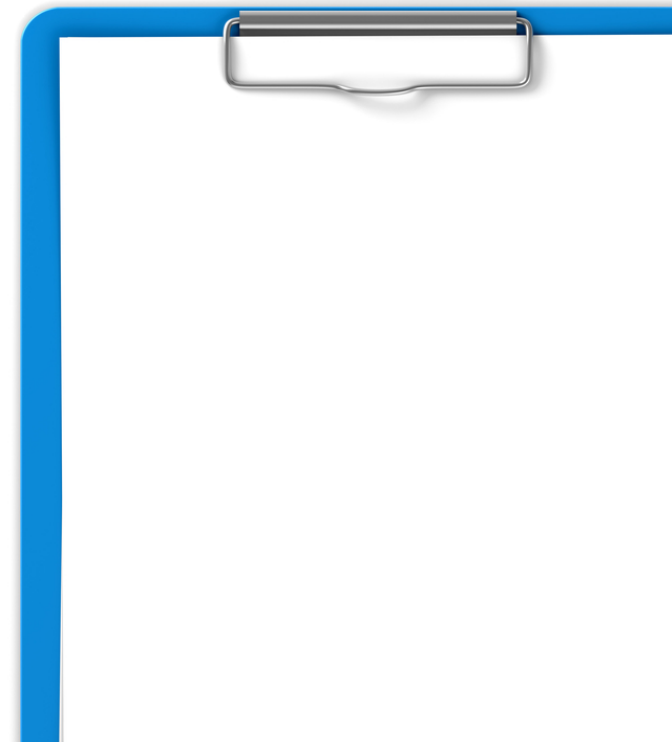
Document Automation

Document automation is intended to replace the burdensome work of manually filling in repetitive documents with template-based digital systems.

Many of these documents can run to the scores or hundreds of pages, depending on the client or instance, and include a universe of options in terms of content, clause or data elements. Completing them manually can be incredibly laborious, costly and time-consuming.

A modern document automation system employs user interfaces where software-driven Q&As or data entry fields allow it to generate the first draft of a document, which can then be reviewed and routed for approval. Best-in-class platforms let users insert their own rules/logic and data, without programming or coding, and are central to Digital Transaction Management (DTM).

Other features of leading document automation platforms?

• Automated merge template, permitting users to convert existing documents into templates.

• Workflow and email support so documents can be easily shared with collaborators for review, editing or approval.

Document automation is intended to replace the burdensome work of manually filling in repetitive documents with template-based digital systems.

- Clipboard managers let a user save and organize frequently-used text modules for quick access and pasting into documents.

- Customization of graphics to include personalized or project-specific data (such as charts and graphs).

- Efficient personalization through data merges with pertinent records.

Some of the areas where legal document automation is applied, and a sampling of documents where it's employed?

- Contracts

- Retention agreements

- NDAs

- Attestations

- Directors & Officers (D&O) liability disclosures

- Term sheets

- Letters of understanding or agreement Membership forms

- New business intake forms

Workflow Automation

Workflows are, as we've mentioned, the building blocks of any enterprise, They're systematic sequences of individual linked activities that result in a work product, whether it's information, produced goods and services, or any other outcome.

A workflow can involve a single person executing a simple series of simple tasks, or it can involve a group of internal (and often external) participants performing a complex series of tasks.

Workflow automation (also variously referred to as "process automation" or "workflow management") replaces manual and paper-based workflows by automating repetitive tasks by using workflow automation software. This application or platform allows users to design, publish, execute, monitor and analyze/fine-tune these sequences. Components of these platforms typically include:

- **Routing** for orchestrating the routing of forms, doc ments or other assets within a workflow, automatically transferring them from one stage to the next.

An automated workflow can be simple or complex, and include multiple steps, approvals, routings and notifications to manage a host of process contingencies.

- **Distribution** for dynamically assigning tasks on the basis of workload or type of task; a new task can be assigned to an employee who has the availability to carry it out, or who has been designated for a specific type of tasks.

- **Coordination** of concurrent activities to prevent resource or priority conflicts.

- **Execution** of operations not requiring decisions, but that can be conducted automatically.

- **Notification** of participants and stakeholders, updating them on workflow progress or reminding them to execute their assigned tasks.

- **Monitoring** and reporting to assess the efficiency of each workflow and identify opportunities improvement.

In considering adoption of "workflow automation," an enterprise's very first step must be to define exactly what constitutes a "workflow" within that organization.

How a workflow is defined, even between the same law firm or legal depart-ment's various clientele, can vary tremendously. A legal workflow for a software development client won't be the same as for a client in sports and entertainment, or healthcare, or financial services.

Business Process Management

Some use the terms "workflow automation" and "process automation" inter-changeably. But for clarity's sake, it may be best to describe a "process" as a series of linked or associated workflows taking a product or service from inception to delivery. And Business Process Management (BPM) is the next level up from automation of workflows and the processes they support.

Gartner defines BPM as…

*"…the discipline of managing processes (rather than tasks) as the means for improving business performance outcomes and operational agility. Processes span organizational boundaries, linking together people, information flows, systems and other assets to create and deliver value to customers and constituents."*

Some use the terms "workflow automation" and "process automation" interchangeably.

BPM is a way of delivering digital transformation to a legal operations department or law firm by leveraging multiple tools and platforms, such as legal workflow automation. For BPM to be actionable for legal services providers, in fact, it relies on LWFA as a cornerstone application enabling it to deliver its capabilities:

- **Visualization** of all processes and function across a department (or even for processes outside it).

- **Measurement** of relevant success metrics and KPIs.

- **Analysis** of data to determine optimal performance enhancements.

- **Improvement** by selecting and implementing those changes.

- **Control** of implementations via user-defined dashboards to allow real-time monitoring and capture of data for next improvement iterations.

- **Re-engineering** of processes from the ground up, if needed, for better results.
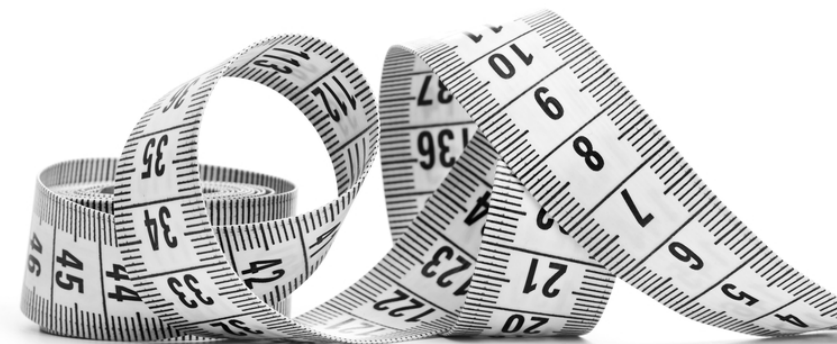
What's driving the rapid growth in BPM adoption?

- The **pace of change** is one factor, as legal provides need to continuously adapt to changes in the competitive environment, changes in the risk and regulatory environment, client demands for greater efficiency, and new technology disruptions.

- Another key driver is **the need to maintain compliance** with organizational strategy, best practices and government regulations; the latter is vital for almost all enterprises, but it's very much mandatory in highly-regulated industries.

04 Adoption Considerations

When planning to adopt legal workflow automation, a legal services provider needs to keep a number of key considerations to keep in mind as it evaluates potential solutions and vendors.

Integration

There are two questions to ask in assessing how a LWFA solution will integrate with other software and systems:

1. Will adopting a LWFA solution require an organization to "rip-and-replace" existing systems?

2. Will the solution supply simple integration with other new platforms, apps and add-ons the organization may find useful?

Answer #1: Best-in-class SaaS LWFA platforms pride themselves on delivering seamless, out-of- the-box integration with an organization's existing digital infrastructure and legacy systems.

That not only removes any need for "rip-and-replace" installation costs, but permits workflows to actually act as unified data hubs. Previously, managers have had to access multiple tracking systems, spreadsheets or other data sources to nudge a workflow forward.

Here's an example of how a Cloud-based workflow automation platform can potentially remove all those aggravations:

- A designer publishes a workflow for a law firm.

- Since the new platform interfaces flawlessly with other systems, like billing, docket scheduling, HR recordkeeping, budgeting and invoicing, it centralizes all those functions in a one-stop location.

- Duplication of effort and repetitive, time-sucking activities are minimized or removed.

Answer #2: Leading SaaS LWFA solutions already utilize APIs to integrate with third-party platforms, such as e-signature providers. Hassle-free integration is an important selling point for these providers, so expect them to offer a whole range of available integrations..

If present-day or downstream integration isn't available through existing APIs, enterprises shouldn't hesitate to ask the workflow automation provider or the third party vendors to develop customized APIs to allow integration to happen.

Configuration

Like many enterprise software solutions, legal workflow automation systems come in a variety of flavors, and that extends to their potential configurations. So picking the right configuration to best suit your organization is another factor to work through as you contemplate adoption.

Cloud-based/SaaS: By running workflow automation using a Cloud-based platform, legal ops or a law firm gain all the established advantages of SaaS: Scalability to immediately meet growth or demand spikes, freedom from hardware and IT costs, flexible deployment across multiple offices, centralization of assets, accessibility across Cloud-connected devices whether near or remote, secure backups to the Cloud, and hands-off updates and upgrades.

Integration with other SaaS apps and platforms is also simpler. Costs are lower, since dedicated hardware, IT personnel, system administration and even electricity costs are now eliminated.

Multi-Cloud: An organization may want its workflow automation solution to be part of an arrangement where multiple Cloud services are engaged to service different workloads and needs. The reasons? It reduces reliance on

a single vendor or platform, allows flexibility and range of choice in picking specific providers for specific needs, and mitigates against disasters. How an enterprise uses and balances these providers can vary, too.

Another rationale? That no single provider can supply a complete solution for everyone in an organization, especially a large and diverse one.

Hybrid Cloud: This is a combination of SaaS solutions with on-premise software, providing the benefits of SaaS but with greater security and control for the enterprise. Users are able to access a legal workflow automation tool via their browsers, with UI and other functionalities executed by SaaS, but user data is stored in on-premise or managed servers.

On-Premise: Installing a workflow automation solution on an organization's own in-house servers and architecture can be mandated by different factors. There may be policies dictating on-premise configuration, a need to integrate with existing internal applications which require it, or overriding concerns about security and safeguarding of data.

This may require employing internal IT resources to install, configure and maintain the app servers, hardware or virtual hardware to run it, and the need to acquire a database license or even other software.

No single provider can supply a complete solution for everyone in an organization, especially a large and diverse one.

Change Management

Implementing legal workflow automation is, by nature, making a change in established practices and processes within a legal services provider.

When that happens, other changes occur that reverberate beyond the processes themselves: job responsibilities, departmental or organizational structures, performance criteria, stakeholder engagement and client expectations all may be impacted, or even thoroughly disrupted.

Employees will ultimately need to change how they do their jobs, and their success in that depends on change management provided from managers on up. Without it, LWFA – like nearly any other major technology – can create negative disruptions

Avoid unintended consequences

A lot of companies aren't prepared for managing such changes. A 2017 survey of UK firms by Deloitte found **only 13%** were ready to respond to digital disruption and create "the organization of the future," though 88% believed it's a priority.

While they admitted they weren't ready, many were still going all-in on disruptive technologies. **42% had adopted robotics** and AI to some degree, and another 42% were running pilot programs. But **just 16%** claimed to be ready to manage a workplace where humans, robots and AIs are working together.

In other words, they're practically begging for unintended consequences and negative disruptions to present themselves.

If an organization values its human capital, then it's imperative they consider the effects of any new technology on its people. While very few workers would ever emulate the example of Mr. Ned Ludd and his followers, it doesn't profit anyone to have a disgruntled workforce that feels it's been left behind as a company moves forward, and not given the training and opportunity to make the most of new advances.

A 2017 survey of UK firms by Deloitte found only 13% were ready to respond to digital disruption and create "the organisation of the future," though 88% believed it's a priority.

For a legal ops team or law firm that's deploying LWFA, it's in their best interests to anticipate and navigate change. In our experience, most of those changes are very positive for everyone. Still, it doesn't hurt to consider some of the areas where it may make an early impact:

- **Employee utilization:** Freed from repetitive tasks, employees will now be able to take on more challenging and productive work. So those projects and tasks need to be put in place, and staffers assigned where they'll be able to make solid contributions.

- **Re-training:** Employees who were immersed in routinized jobs may need training to take on different duties.

- **Offboarding or onboarding:** The fact is, eliminating manual workflows may require an organization to offboard some employees. Or, in other cases, it'll need to bring on others with different skillsets to handle new opportunities or demands created by automation.

- **Client account management:** Workflow automation can result in significant acceleration of responsiveness and customer client service. Being able to deliver faster service may create new expectations and opportunities with those clients, or even issues as both legal team and client make the transition. Controlling that transition is important, even if it seems like there are nothing but benefits on both sides.

- **Infrastructure concerns:** If workflows and critical processes are automated and expedited, is the rest of an organization's operational infrastructure able to keep up? If a lega; department uses forms automation for quick intake of service requests, for instance, then clients may gain an expectation of having their other needs handled just as frictionlessly. So every other stage of the client service process may need to be accelerated, too.

Workflow automation can result in significant acceleration of responsiveness and customer client service.

Cultural Shifts

The biggest effect of legal workflow automation may be how it may shift the very culture of your legal services organization. Profound changes may take place that happen beneath the surface, or so swiftly that nobody is quite ready for them.

- Let's say a legal operations department is built around the shared expectation that a certain workflow will take XXX amount of time and consume XXX amount of attention and resources from various personnel, from senior counsel on down

- When the changeover to a workflow requires only X amount of time and labor, it will demand alterations in how that department operates and in the resources it utilizes to get its work done.

- Moreover, a relatively slow-paced department has now become quite agile, and adapting to that newfound agility can be a worthwhile but bumpy ride, as some of our clients can attest.

- Before deployment, therefore, team and enterprise leaders need to get out in front of these potential shifts by analyzing just what effects automation may have on their enterprise's basic culture.
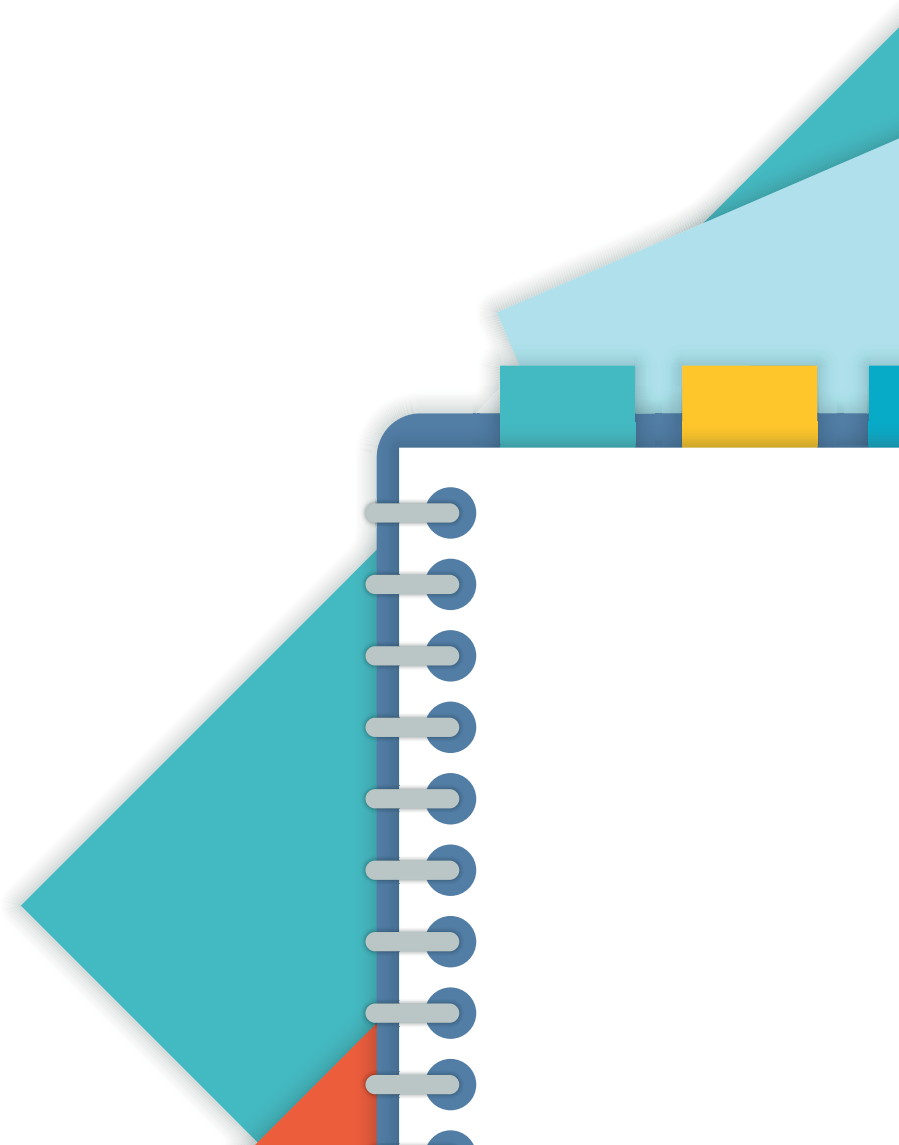
- This way, they can be in a position where they're proactively directing those changes so the organization does more than just optimize workflows, but optimizes and evolves the workplace in a good direction, too.

Otherwise, a legal services team can be victimized by unanticipated, unmanaged changes that damage their culture. Leaving them with the pretty poor excuse that, well, "shifts happen."

Engineering Resources

Legal workflow automation adoption may or may not consume a range of different engineering and development resources inside the enterprise, depending on the exact configuration chosen and how it's deployed:

- For instance, an on-premise LWFA installation will demand new hardware and infrastructure changes to accommodate it, such as dedicated servers or partitioning on existing servers. Those will demand engineering and IT resources.

- Ongoing maintenance and updating of that on-premise platform, along with any present or future integrations, will also demand engineering support.

Profound culture changes may take place swiftly or beneath the surface.

- At the other end of the continuum, a Cloud-based platform may need only minimal involvement from IT, often just to enable access to databases or legacy systems.

- A hybrid configuration may split the difference, since it combines an SaaS user environment with on-premise data storage.

Development Resources

Just as with the engineering resources required to support different workflow automation configurations, on-premise versus SaaS solutions occupy two extremes of the development and coding spectrum.

With a dedicated on-premise LWFA solution, development resources are probably a fact of life:

- Coding may be necessary to make it work seamlessly with other proprietary applications and infrastructure within an enterprise. Chances are, those will be housed on-premise as well, and legacy applications might have seen extensive customization over the years.

- Plus, any updates or upgrades to core or bolt-on functionalities for your platform may require the involvement of an in-house or consulting developer, either because of organizational rules or because of the complexity of making updates.

- The upside? The software is expressly customized to meet organizational requirements, which can justify the development costs to on-prem adopters.

For SaaS LWFA solutions, the promise of managed services is, of course, that the customer is liberated from development concerns: the application is plug-and-play:

- No coding or developer fingerprints are necessary, as the platform provides out-of-the-box usability from day one and is usually OS-and device-agnostic.

- The trade-off is that the product may not be sufficiently customized to the enterprise's particular needs and concerns.

- For these adopters, however, SaaS' flexibility, convenience and predictably low costs involved outweigh those considerations.

For SaaS solutions, the customer is liberated from development concerns.

And as we've pointed out previously, a hybrid configuration can lie somewhere in the middle in terms of it demands for engineering and development resources

User Self-Service

One of the most powerful attractions of a good legal workflow automation solution is its ability to let enterprises design and publish self-service forms and interfaces.

These free employees from having to deal with paper-based forms and the accompanying processing involved. In a lot of cases, the use of self-service forms can be obvious:

- For clients and other users, self-service forms allow them to make service requests, document requests, file complaints, or many other actions that would have otherwise required a printed form, a phone call, or email.

- For employees and stakeholders, everything from a services request to a NDA can be handled using self-service forms.

In deploying legal workflow automation, then, an organization should take stock of all the instances where self-service forms and documents are applicable.

It should also exercise a certain amount of good judgment: By providing self-service touchpoints, what how will that impact those processes, especially if they cause an increase in requests for certain services? Managers will need to allocate resources to deal with these changes, so planning ahead is just common sense.

In designing self-service forms and touchpoints, organizations also need to bear in mind how even the most utilitarian form needs to be on-brand and reflective of the larger user experience they're attempting to deliver.

Self-service forms can eliminate printed forms or a trip to a service counter.

05 Deployment Examples

Automating a Workflow

Automating a single workflow, such as the legal operations workflow for a non-disclosure agreement (NDA), can generate sizable efficiency and savings. One example: A global company which regularly dealt with hundreds of NDA requests yearly from multiple markets turned to workflow automation to streamline a process that consumed huge amounts of Legal Ops staff and counsel time.

It leveraged workflow automation to power a self-service NDA portal covering 20+ countries, even utilizing Chinese characters. Though used by hundreds of employees annually, it freed lawyers or paralegals from being bogged down in those hundreds of transactions. While eliminating hundreds, even thousands, of costly wage hours.

Though used by hundreds of employees annually, workflow automation freed lawyers or paralegals from being bogged down in those hundreds of transactions.

How does this work?

- Once workflow automation has been deployed, NDAs can be custom-designed or use pre-formatted templates.

- Using a self-service online portal and standardized forms, users now can request and obtain error-free NDAs without any involvement by a lawyer.

- Multi-language support allows users to view request forms in their language of choice, eliminating the need for multiple copies in different languages.

- A full template repository warehouses NDA templates to meet any contingency.

- Routing of requests to the right internal stakeholders, if needed, can be built into the NDA workflow.

- Signature authority requirements are integrated into the workflow and can leverage secure e-signature tools.

- Real-time status monitoring provides process oversight.

- Stakeholders can collaborate in approval processes and more complex NDAs via online commentary/notation.

- Notifications and alerts can be dispatched to stakeholders at pre-designated points throughout the process.

The benefits of automating this single workflow?

- The NDA process becomes up to 7 times faster and 15 times more efficient, with 100% compliance and up to 400% ROI.

- Simple standardized NDAs can now be obtained any time, at any location, without costly internal review by legal personnel, driving considerable savings.

- Via a single portal, large enterprises can now manage NDA processes at scale, even across global networks.

- Automating the process delivers an error-free workflow and user experience that's faster and more reliable.

- NDA workflows are automatically backed up to a secure Cloud archive, and easily accessible for audit, governance and compliance purposes.

- E-signature integration standardizes secure approvals.

Automating a Department

A legal operations department within any organization has its own distinct workflows, developed over time, to handle specific duties and deliverables. If those workflows involve a hefty amount of contact with clients, whether internal or external, plus the processing of numerous forms and documents, old-school workflows are bound to bog down.

It's why legal operations are increasingly adopting workflow automation as a way of accelerating and improving service processes, making the most of available resources, and raising their esteem among others in the organization, thanks to their newfound transparency and ability to add value to the business

By digitizing various form, and automating the workflows behind them, they can deliver a much more responsive and convenient service experience. Here's how:

Here's how:

- An internal client uses the legal department's website to use an online self-service form designed to guide him or her through the process of filling it out and submitting it.
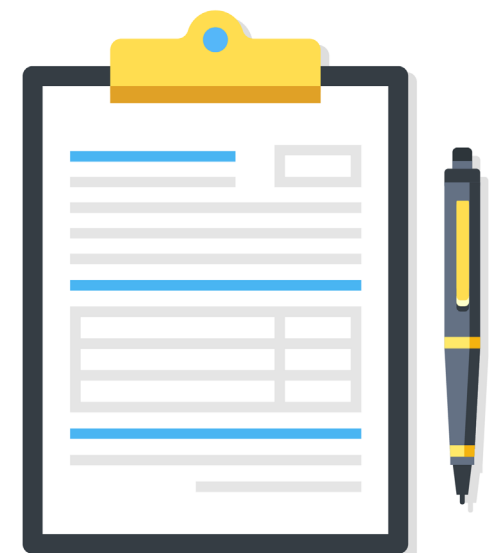
- Since its online, these services are now available to the organization 24/7.

- This eliminates the delays involved in processing work intake or delivering basic services that can be wholly automated.

- The completed form is error-free, since it can't be submitted until all fields are properly filled.

- Once submitted, it's automatically routed to the right parties for review and approval. No mail carts or in-baskets required.

- If more than one person needs to review the request, the workflow can be designed to automatically forward it to the next person in the review chain.

- Automated notifications and reminders ensure everyone involved in the workflow know when the request is ready for review, and prods them into action. The repetitious task of manually routing forms for approval and later chasing down those approvals is eliminated.

- The platform's dashboard permits managers to check on how timely each employee is being about executing their stage of the workflow.

The repetitious task of manually routing forms for approval and later chasing down those approvals is eliminated.

- The user, meanwhile, can receive a digital notification their request is being handled, and even can be alerted when it's been fulfilled.

- Once a request is approved or a workflow is completed, it can trigger another related workflow.

- For auditing purposes the entire workflow, including documents, gets automatically archived.
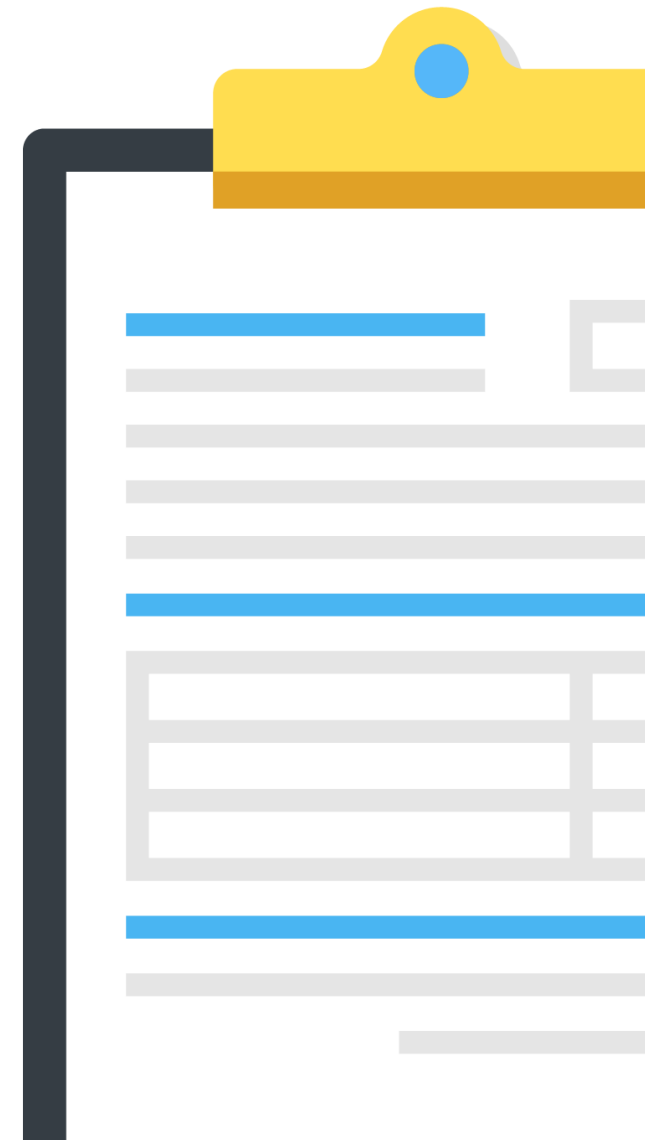
The Benefits?

- **Optimized efficiency**, as a department replaces labor-intensive, error-prone processes.

- **Cost containment**, as labor-intensive phone calls or email replies are eliminated via automation.

- **Boosted morale**, since employees are freed of repetitive tasks to focus on more important work.

- **Accelerated responsiveness**, since online self-service forms and process automation make service requests executable 24/7.

- **Improved compliance**, as dashboards and automatic archiving let workflows be managed in real time and permanently preserved for audit.

- **Greater transparency and trust**, because automated access to documents and visibility into operations builds client and managerial confidence.

- **Better personal data protection**, as clients' sensitive data can be kept more secure in digital workflow environments.

Legal ops departments are increasingly adopting workflow automation as a way of accelerating and improving service processes.

- **Scalabilty**, since SaaS-based platforms can scale to handle demand volume, even during peak load times that would swamp traditional channels.

- **Digital analytics** about users and their behaviors delivers actionable insights to drive more accurate planning and responses.

Automating an Enterprise

Legal workflow automation can optimize core processes that span an entire organization, and there's no better example than by extending legal best practices to other departments outside of legal operations.

With a scalable, easily-adopted and deployed SaaS LWFA solution, processes can be built for use by other departments where compliance and legal best practices need to be observed.

Through integration with an enterprise legal management (ELM) platform, the right LWFA solution can extend ELM capabilities across the entire organization so processes are compliant, standardized, and auditable. Not to mention more efficient and cost-effective.

Workflow automation can optimize core processes that span an entire organization, and there's no better example than the workflows involved in maintaining IT support for every desk and department.

How does it happen?

- Managers and employees in departments outside of legal operations can either import workflow templates created by legal ops, or are trained in designing their own.

- By using content and workflow templates drawn from a "single source of truth" – a centralized repository – they publish compliant workflows that automatically embed best practices and approved content.

- API integration capabilities allow for other workflow triggers, such as integration with HR and security systems, to automatically launch workflows based on various pre-specified conditions.

- Advanced logic and rules can be embedded in intakeworkflows to route requests or alerts to the right gatekeepers or specialists, depending on staff availability, type of request, or other parameters.

- Dashboards and integrated analytics allow managers to have real-time visibility into all workflows so they can make real-time adjustments, conduct analyses, generate reports and tweak overall performance.

- The workflow automation system can integrate seamlessly with other relevant enterprise platforms, such as project management or time tracking applications.

Enterprise Benefits?

- **Hardwired efficiency gains and ROI**, as outdated, mistake-prone processes are replaced with a more sophisticated platform for designing, executing and governing workflows.

- **Improved response times** across the whole enterprise, as requests are fulfilled and situations are resolved much more quickly.

- **Costs are reduced and/or IT expenditures optimized** as teams and resources are deployed more rationally and efficiently to answer need.

- **Boosts to morale and productivity** across the organization and within the legal operations department.

- **Continual improvement** in performance as workflow analytics permit fine-tuning and optimization.

Legal operations assumes a more central role in the organization as a hub of excellence, innovation and efficiency.

06 Adoption & Deployment Planning

If an enterprise is committed to improving the efficiency and responsiveness of its operations by eliminating paper-based processes by adopting LWFA, how can you ensure success?

That boils down to proper planning. There are proven steps to follow while evaluating, adopting and deploying the right platform, and they'll lead to a satisfactory result for everybody in the enterprise.

Right off the bat, legal operations teams should conduct an audit of operations to identify where LWFA can make an impact, and what it wants it to accomplish.

1. Build a Business Case

Right off the bat, legal operations teams should conduct an audit of operations to identify where LWFA can make an impact, and what it wants it to accomplish. Don't make vague assumptions about how it can help improve workflows and outcomes: have a clear vision in place about where it can accelerate and optimize your particular processes and customer/client services, and the cost savings and other productivity gains it stands to deliver.

Look beyond the hard ROI of adoption in building your business case by laying out the opportunity costs and disadvantages of not implementing workflow automation, too.

2. Get Management Alignment

It's crucial to get agreement from all decision-makers and key stakeholders about the objectives and success metrics involved in workflow automation adoption. It helps to identify and co-opt the people who are going to be its best advocates inside your organization, including leadership team members.
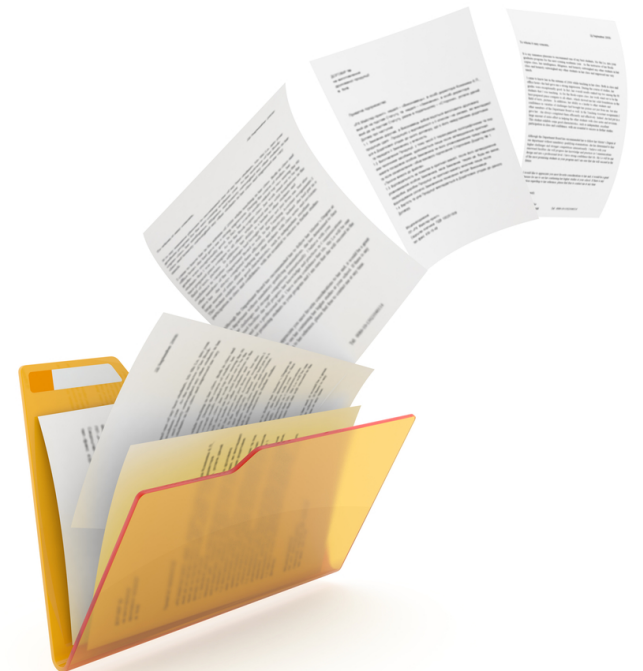
Also enlist those who may be important external stakeholders or influencers, so you can make them feel they've got enough ownership of the process to become enthusiastic about adoption.

Get the participation and input of those who will be involved with the changeover. That doesn't just mean the internal personnel involved in managing or executing workflows, but customers and other third parties who will be affected by adoption.

3. Technical Planning

Be thorough in planning the engineering, development and infrastructure aspects of adoption, which can vary from extensive (on-prem) to minimal (pure SaaS), based on the configuration involved.

Plan in terms of not just immediate adoption challenges, but in terms of how you'll be using workflow automation a year out and beyond: what future integrations, such as BPM or content publishing platforms, will it have to address?

Don't rely strictly on case studies and testimonials they've handed you: interview prior customers, consult peer groups and online user communities to learn their track record and see how engaged they stay after the sale.

4. Evaluation and Procurement

Once you've assembled a comprehensive vision of what you want from a workflow automation solution, you'll be able to set out clear criteria for products and vendors. Cost, ease of use, feature sets, scalability and more... whatever boxes you need checked off, make sure they're included in any RFP

Dig down deep when it comes to researching potential vendors, whether you've approached them or they've approached you. Don't rely strictly on case studies and testimonials they've handed you: interview prior customers, consult peer groups and online user communities to learn their track record and see how engaged they stay after the sale.

A lot of the work ahead will involve training and customization, and a responsible provider will stick close by you the entire way, because customer service is often the real differentiator between merely acceptable products and transformative ones.

5. Implement Pilot Processes

It's neither wise nor feasible for many enterprises to roll out workflow automation universally from the start, for various reasons. So prioritize specific processes that need immediate attention to serve as pilot programs, then analyze them in action to fix performance issues, provide clear evidence of automation's positive impacts, and build a solid case for broader internal adoption.

For the first pilot workflow, pick one that consumes valuable time and employees see as a hassle. By automating it, you'll immediately demonstrate the value of workflow automation in both money saved and headaches cured.

6. Deployment & Training

There can be more to implementation across a department or enterprise than simply hitting the "on" switch for a platform. It's often best to roll out a tool as powerful as workflow automation in measured steps, focusing on a few processes at a time so your organization can get acclimated. Even plug-and-play SaaS solutions should probably be introduced gradually, not just to minimize disruptions but to allow you to exercise steady change management.

Training, even with simple-to-use software products, is essential.

Training, even with simple-to-use software products, is essential. It's smart to train a cadre of "power users" or other employees to be expert enough in the platform that they can reliably coach others to success in using it.

7. Measurement

In the private sector, ROI is measured in dollars and cents, but government operations typically have different KPIs. Those might vary even between processes, from speed-to-completion for specific workflows to reducing client wait times and improving satisfaction levels.

Make sure you clearly define all the metrics you want to employ so you can quantify and report successes or fine-tune improvements.

8. Customer/Client Success

Legal workflow automation will, in our experience, have immediate impact on your workplace. But it'll also have an effect on your clients, and it's worthwhile to track those positives, too.

That way, you can demonstrate how accelerating and optimizing your own processes has paid off for them, as well, which is a strong building block for client retention.

07 Its Future Evolution

Blockchain

Today, legal services teams of all sizes and types increasingly rely on broad internet connectivity and platform-based business models. For many businesses, those digital networks and the data-based transactions they permit matter far more than any physical footprint.

Digital transactions, such as sharing and approving contracts, and workflows are mission-critical for 21st century legal teams, and keeping track of them is crucial. Not only does recording them allow analysis of past performance to steer future planning, it's also a matter of meeting regulations that are becoming prevalent in more countries. Any U.S. firm dealing with the recordkeeping burdens imposed by Sarbanes Oxley can testify to that.

Digital transactions and workflows are mission-critical for 21st century legal teams, and keeping track of them is crucial.

Workflows, operational processes and the assets attached to them – whether it's a purchase order, a stock transfer certificate or an employee performance review – are of great criticality to any enterprise. Yet up until now, even when those workflows have been automated, they've been subject to challenges common across countless organizations.

With workflow automation solutions built on blockchains, those challenges are met. Actually? They're resoundingly kicked to the curb:

- **Transparency and governance** are enhanced since readily-accessible ledgers of document-driven processes help overcome the problem of Balkanized workflows and assets scattered across internal units and functional areas. This improves transparency and internal oversight, particularly important when one considers the sheer volume of workflows underway in an organization of any appreciable size.

- **Permanence and ease** of auditing are improved since once a record is added to a blockchain, it can't be tampered with, making it more reliable and durable than internal databases and spreadsheets.

- **Security is massively upgraded,** vital in an era where black hat hacking, data breaches, and new software vulnerabilities hit the headlines every day (and those are only the ones the public knows about). For those dealing every day with contracts and legal transfers, this is an enormous advantage. Since it utilizes a decentralized network, blockchain can easily withstand malicious attacks that find chinks in the armor of centralized systems.

- **Competitive advantages** are created since a legal services provider can now vouch for a higher level of transparency, efficiency and data protection. For a prospective client, this is an absolute tiebreaker.

Where will it work best?

Blockchain-based workflow automation will succeed in any industry or category where digital transactions and document-based processes are important. Legal services is at the forefront, but there are other sectors primed to seize the advantages of blockchain-based workflow automation:

- **Legal services and corporate legal operations**, especially in crafting smart contracts and other secure documents and processes.

- **Financial services**, where protection of client information from hackers and regulatory accountability are major challenges.

- **Insurance**, an industry confronted with many of the same challenges listed above, but also in constant search of new ways to build customer loyalty.

- **Government**, since protection of constituents' private information is just one need among many for federal, state and local administrations and agencies.

- **Human Resources**, also tasked with managing and protecting personal information at scale.

- **Technology and IT**, where incredibly complex digital ecosystems and infrastructures require equally extensive reporting and recordkeeping.

Blockchain-based workflow automation will succeed in any industry or category where digital transactions and document-based processes are important.

Artificial Intelligence

The advent of machine learning and artificial intelligence? It's already in the rearview mirror. A recent IDC report revealed that two-thirds of businesses globally have already implemented AI or plan to deploy it in the next five years.

Today, everything from your next Google search to Facebook advertising employs some form of AI, and creating "cognitive workflows" within an enterprise's operations is a natural next step.

Just one example? Ernst & Young invested $500 million developing AI tools to, among other things, handle employee onboarding processes. The bot enters incoming employee information and automates emails, saving thousands of hours of human labor.

The bots are knocking

Robotic Process Automation (RPA), as it's called (or "Autonomics" by others) may deliver efficiencies that drive down the price of products and service while also increasing the ability of a legal operations team to deliver faster, more personalized client experiences and service.

Artificial intelligence will allow workflows to take over even more tasks, at more sophisticated levels.

What are some of the ways AI may directly affect workflow automation, and the very nature of "workflows" as we now know them?

- **By making workflows actively intelligent:** Machine learning is based on the fact that a neural network can actually teach itself new things; AI-powered workflow automation platforms will learn by doing, over time, and be eventually be able to proactively design more efficient workflows and processes with their own embedded intelligence, so they're able to accurately react to changes or disruptions.

- **By making them self-generating:** An AI-powered LWFA solution may not have to wait for a human being to instigate a workflow. It may be able to recognize the need for a new process and design and launch it without human hands ever touching a whiteboard or a keyboard.

- **By embedding best practices:** In manufacturing automation, research is being done aimed at programming the IT infrastructure of a production plant with the knowledge and best practices of experienced staff members, from engineers on down to machine operators. So it's possible this could happen for AI- powered workflows in other sectors, too, including legal services.

- **By taking over all routine tasks:** AI and machine learning will allow legal workflow automation platforms to fully free employees from the most mundane everyday tasks where human intelligence isn't really put to the test. Some experts believe this will completely disrupt the present-day Business Process Outsourcing (BPO) sector.

- **By redefining what's considered a "workflow":** What can be automated is limited by available technology, but artificial intelligence may allow us to expand legal workflow automation into new areas where we never imagined it would find application.

- **By unleashing human potential:** Legal workflow automation already frees legal professionals to focus on work where human intelligence, insight and creativity are best applied. Adding artificial intelligence will allow LWFA to take over even more tasks, at more sophisticated levels, so people can apply themselves to those tasks where they're invaluable and irreplaceable.

Workflow automation already frees people to focus on work where human intelligence, insight and creativity are best applied.

About Mitratech

Mitratech is a proven global technology partner for corporate legal professionals who seek out and maximize opportunities to raise productivity, control expense, and mitigate risk by deepening organizational alignment, increasing visibility, and spurring collaboration across the enterprise. Serving 1,200 organizations of all sizes across the globe, we represent almost 40% of the Fortune 500 and over 500,000 users in over 160 countries.

With Mitratech's proven portfolio of end-to-end solutions, operational best practices spread throughout the enterprise, standardizing processes and accelerating time-to-value. By unlocking every opportunity to drive progress and improve outcomes, we're helping legal teams rise to the challenge of serving the evolving needs of the modern, dynamic enterprise.

Now, by offering TAP Workflow Automation, an easy-to-use SaaS solution for digitalizing and automating repetitive manual processes, Mitratech empowers Legal Operations teams to extend legal best practices and compliance into workflows throughout Legal Ops and even the entire organization.

To learn more, visit www.mitratech.com.

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