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10 Transformative Facts About Legal Workflow Automation

Learn the key benefits to expect from adopting the right SaaS workflow automation solution for your Legal Ops organization.

Table of Contents

Overview

Enterprises are striving to compete in an evolving marketplace where technology-driven agility, flexibility and execution make all the difference between success and failure. That's especially true for Legal Operations departments, and it's why more of them are turning to web-based workflow automation solutions.

Why? Because traditional business processes, *especially* in the legal department, were built around manual, email and spreadsheet based workflows. The results?

High administration costs, errors, delays, and heightened risk and compliance dangers. Those may have been acceptable once upon a time but can now be fatal in an era where workflow automation allows astute organizations to optimize and accelerate essential processes, including those in Legal Ops.

Traditional business processes, especially in the legal department, were built around manual, email and spreadsheet based workflows resulting in high administration costs, errors, delays, and heightened risk and compliance dangers.

Workflow automation can transform Legal Ops

In this guide, we'll walk through 10 key facts showing how workflow automation can have a **transformative effect** on Legal Operations. Then we'll provide a **solution assessment checklist** you can use for evaluating different automation platforms.

Putting the right platform in place means you'll be able to reap a wide range of benefits, affecting every facet of operations, from employee morale to the bottom line. By freeing Legal Ops staffers from the "pain of the mundane," you'll empower them to be more productive and engaged.

In nearly every line of work and workplace, automating old-school processes and workflows is becoming crucial to future success. So understanding the full potential of workflow automation for Legal Ops? It's mission-critical.
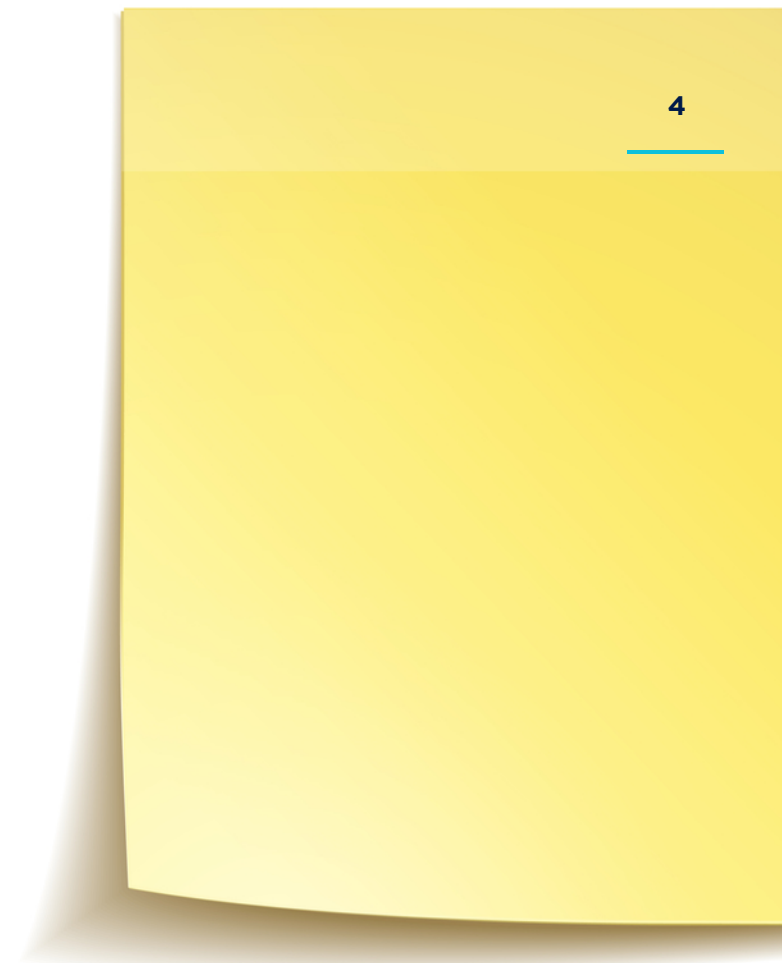
01   It Saves Time and Resources

Workflow automation can – and should – have an immediate impact on your operating costs through the efficiencies it creates:

- One Fortune 500 enterprise found that once they'd automated key Legal Ops workflows, work was getting done in **1/20th of the overall time** it had taken previously, while consuming just **1/4th of the employee time** demanded by manual workflows.

- The benefit to their bottom line? It was absolutely measurable – in the millions of dollars.

Another example? If an employee making $50/hour writes 5 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, and automation's benefits loom even larger.

TAP Tip: As a first step, lay out the business case and financial rationale for workflow automation. Use these as guidelines for evaluating prospective vendors' ability to deliver against them, especially their capacity to track the metrics needed to measure success.

02 It Eliminates Errors and Delays

When human error and workflow delays are minimized or eliminated altogether, there's a better experience for everyone: Legal Ops team members, external clients and stakeholders alike.

There are hidden time-wasters involved in manual workflows that any best-in-class legal workflow automation platform should eradicate. Some examples:

- According to IDC, the time spent finding lost documents or handling other document-related challenges adds up to a **productivity loss of over 21% per worker.** In other words, a fifth of employees' time is spent wrangling just one problem caused by manual workflows.

- PricewaterhouseCoopers says finding a single lost document **costs a company an average of $122.**

- Yet **7.5% of all company documents are lost completely**, but the only way you realize they're lost is by wasting time and money searching for them.

TAP Tip: For the first workflow you tackle, 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.

03 It Prevents Security, Governance & Compliance Risks

They're the kinds of risks that are serious enough for smaller firms. For growing or global concerns, they're incredibly problematic, and it's typically left to Legal Operations to help police them.

With a Cloud-based workflow automation solution:

- Employee actions are recorded and auditable in a single repository

- Important data is safeguarded and role-restricted.

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

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

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

- Out of the box integrations with EraCLM, TeamConnect, SFDC, Adobe Sign and DocuSign can allow legal best practices to be embedded in workflows even outside of Legal Ops.

- Open APIs Connect TAP to the rest of your technology suite.

TAP Tip: For the first workflow you tackle, pick one that is high-volume and risky (like conflict waivers). By automating it, you'll immediately reduce hours spent in completion, and begin to build a secure repository of related documents - removing them from desktops and inboxes.

04 It Centralizes Document Management and Optimizes Accessibility

There's no such thing as a "centralized database" when documents and records sit across employee email inboxes, desktop folders, online drives, and even paper documents in file cabinets.

Workflow automation platforms, on the other hand, make documents and assets accessible from across the entire enterprise, and from any device, while still preserving security:

- By using a single unified database of record accessible through the Cloud, SaaS workflow platforms centrally store all documents, forms, stakeholder communications, workflow records, images and other assets, so they're readily obtainable and never lost.

- Especially when that database is Cloud-hosted, redundant backups make disaster recovery far simpler than it would be if a paper-based archive was damaged or destroyed.

TAP Tip: Stress-test automation products at length using multiple devices and operating systems to ensure cross-platform accessibility. Also, have remote users and teams in multiple locations verify they can reliably save and access the same centralized workflows.

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

- Security and access limitations can be set so only authorized participants can engage with sensitive assets or data, or their access is limited to only the stages where they're necessary to a workflow.

05 It Shouldn't Require IT Involvement

Earlier iterations of legal technology solutions required hefty lift from IT to set up and constant maintenance. Divergent products ran on different platforms, or used taped-together custom coding and inconsistent interfaces. Often, workflows and their associated data were hosted in separate silos or even different physical locations across the organization.

Nowadays, a reliable Cloud-based workflow automation platform should provide ease of adoption and implementation, allowing users to start building workflows with minimal ramp-up time or assistance, meaning any team can start to automate the tasks that matter to them, on their own or even in tandem with the entire organization.

How minimal? Anyone who knows the logic of their process can begin to draw out the rules of the workflow. Non technical, "citizen-engineers" setting up workflows should be able to design 80-90% of their very first workflow completely on their own when using a Cloud-based workflow automation system with features like these...

TAP Tip: Get real-world experience using any potential product and talk to existing users, especially longtime ones who can give you their POV on its reliability, performance and support from the vendor.

- Plug-and-play simplicity of adoption and use, requiring minimal training.

- Drag-and-drop ease of designing workflows and forms via an intuitive UI.

- Easily customizable workflow, form and content templates.

- The ability to readily import or convert existing forms.

- Automated back-end programming of workflows, with no hands-on coding necessary.

- Self service resources for learning and the TAP co-innovation community to collaborate and share proven use cases with.

06 It Rewards Collaboration and Improves Change Management

Optimizing workflows absolutely depends on stakeholder engagement. So when the process of building them becomes more flexible, customizable and quick, as it does using workflow automation, it makes it easier to get stakeholders to collaborate to define and refine the workflows they really need.

How does that play out?

- First, identify the stakeholders who'll be involved with any given workflow.

- Talk with them and get their input, then design a draft workflow. This is a great time to optimize and redefine the steps actually necessary to complete a task.

- Engage your stakeholders at every step of this process. By production time, they should feel like they own it.

- Have stakeholders review the draft workflow, then iterate until everyone is happy.

- Once it's approved and launched, regularly review analytics on process durations and completion rates to spot and alleviate bottlenecks or make other improvements.

TAP Tip: Adopt a dual perspective – that of a process engineer and a CFO – as you're optimizing a workflow. That way, you'll be on the lookout for both efficiencies and savings.

07 It Can Integrate Painlessly with Your Existing Systems

Workflow automation platforms provide 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 your workflows to actually act as unified data hubs for Legal Ops and the departments it serves.

Previously, you had to check multiple tracking systems, spreadsheets or other data sources to nudge a workflow forward. **A workflow automation platform spares your team all those aggravations.**

For-instance:

- You design a workflow for "New Work Intake" for the law firm where you work.

- Since the new platform interfaces flawlessly with other systems, like billing, docket scheduling, HR record keeping, 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.

TAP Tip: Make sure management understands not only the ROI of workflow automation integration but also the costs, in dollars and lost opportunities, if the "owners" of some systems and data want to stay segregated in silos.

08   It Cost-Effectively Ensures Permanent Audit Trails

Workflows shouldn't vanish once they've served their purpose, but be storable, searchable and retrievable. Cloud-based workflow automation platforms can provide that convenience, ease of access and peace of mind.

This enables accountability, permanent auditability, accurate reporting, and complete visibility into every stage of a workflow, so it can be reviewed in granular detail. This helps you perpetually manage risk, maintain digital governance, and control the costs of compliance reporting:

- An automated workflow for, say, a sensitive HR procedure has been designed to be strictly compliant with legal requirements.

- By recording that workflow in the Cloud, you've got permanent documentation, always at the ready, to prove it was properly executed.

TAP Tip: Don't hesitate to insist of seeing examples on how a vendor's product delivered verifiable savings or efficiencies for other customers.

- By automatically recording hundreds or thousands of workflows, a company can see huge savings in maintaining compliance records mandated by Sarbanes Oxley (SOX) or other regulations.

67% of large companies responding to a 2020 survey by global consultant firm Protiviti said SOX Compliance hours increased more than 10%, leaving a large need for automation.

09 It's Become Platform, Device, and Location-Agnostic

Your employees need to be able to check in on workflows from their desk, the airport, their backyard or anywhere else. And they should be able to do so on any device or platform, whether it's an Android tablet, a Windows laptop or an iOS smartphone- All while keeping information secure and consolidated.

SaaS workflow automation platforms are catering to that need, because it's now essential to customer success, according to these statistics its easy to see why:

- Only one in five Americans worked from home before COVID-19. Now, 71% of Americans work from home all or most of the time. [Pew Research, 2020]

- 73% of VP and C-suite IT leaders believe remote workers pose a greater risk than on-site employees. [OpenVPN survey]

- 56% of businesses have begun transforming with the help of automation. [Forrester 2018]

TAP Tip: Meet with teams who are collaborating now, see where there are silos and roadblocks. As you begin to automate these processes build out logic for escalations, reassignments and real-tie collaboration to keep progress moving forward.

10 It Empowers Employees and Increases Engagement

Today, employee engagement is a primary concern for organizations. In 2020, Gallup found that only 36% 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."

TAP Tip: Beta test a workflow automation platform with a team or department, if possible, and survey its effects on their morale and engagement.

By delivering that kind of solution, workflow automation frees employees both inside Legal Ops and outside of it to focus on higher-value work, and helps them be more productive. That, in turn, helps them feel more fulfilled in their jobs, with a greater sense of purpose and work-life balance.
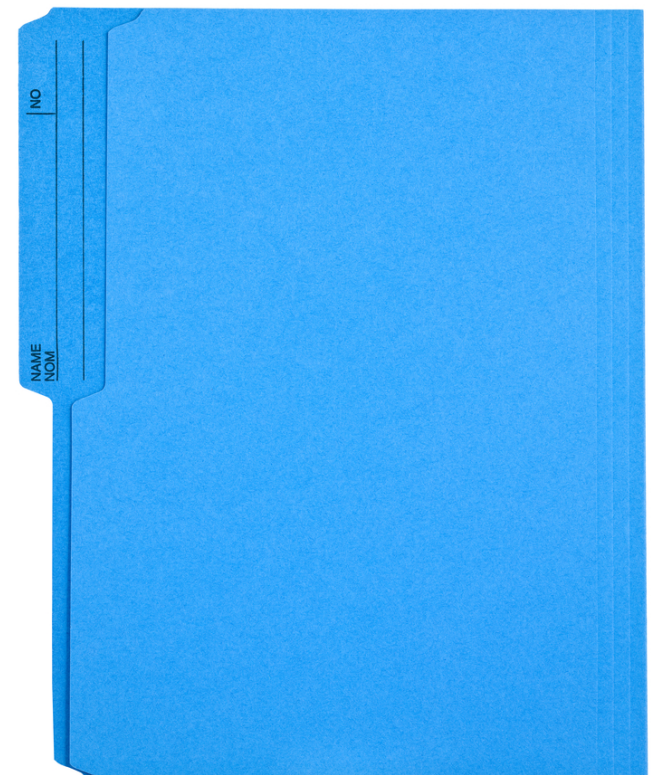
11 Bonus Fact: It Creates (Good) Unintended Consequences

These are positive consequences with real benefits, though they can be difficult or impossible to anticipate until a Legal Ops department has already implemented workflow automation:

- **Higher-quality work:** Workflow automation often proves its ROI quickly (1 trillion is lost annual to mismanaged tasks, according to research from CMO Council) It also means with help of technology, employees are given time back to do the work they were hired to do and the one they care about, without being burnt out from administrative tasks.

- **Positive morale:** In a 2019 Verint survey, 72 percent of workers with low-stress levels associate their productivity with their access to technology and 64 percent of respondents said that they found automation to help reduce workload and stress.

TAP Tip: Ask current users of a workflow automation system you're evaluating what *their* unintended consequences were, good or bad.

- **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, other 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 happened as law firms and Legal Ops departments have moved tech-heavy jobs in-house to 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.

Legal Workflow Automation Vendor Checklist

- Does a vendor's legal workflow automation platform automatically track and report workflow success, completions and timeframes, among other indicators, so management can continually monitor efficiency and savings?

- Is it customizable, configurable and flexible enough to meet your exact needs?

- Does it allow users to quickly and efficiently build even complex workflows?

- Does it feature an intuitive UI and drag-and-drop design tools?

- Will it require a minimal learning curve?

- Can it be implemented without custom coding and programming?

- Does it require little or no involvement from IT?

- Is back-end functionality automatically programmed, avoiding hands-on coding?

- Does it include reminder and notification features that mitigate delays – for example, by nagging the next person in an approval chain to give their signoff?

- Will it ease and encourage collaboration by stakeholders?

- Can it painlessly integrate with legacy systems or third-party platforms via APIs?

- Is it easily scalable to meet sudden or even anticipated business needs?

- Is it certified for HIPAA_HITECH; ISACE PII; ISO 27001; PCI_DSS 3.1; and, SSAE 16 (SOC), or other industry-specific standards?

- Does it meet all specifications developed using input from your organization's security and governance stakeholders?

- Does it provide a centralized, truly Cloud-based environment to handle every facet of a workflow?

- Is everything related to workflows retained and accessible within a single database of record?

- Can users access and manage workflows, documents and assets using mobile devices?

- Does it let you predefine general stakeholder/ participant roles, such as supervisor, assessor, employee, etc.?

- Does it deliver out-of-the-box integrations that are ready to use immediately?

- Does it provide approval process features such as e-signature functions from providers like Adobe Sign and DocuSign?

- Does it include comprehensive auditing and reporting capabilities?

- Can the vendor provide in-depth case studies or customer testimonials?

- If your workforce uses a specific OS or hardware lineup, is it optimized for that system or family of devices?

About Mitratech

Mitratech is a proven partner for organizations that seek to optimize their compliance, productivity, efficiency, and effectiveness. Our robust portfolio offers end-to-end solutions for modernizing and automating operations. Leaning on more than 30 years of industry knowledge, Mitratech delivers unprecedented visibility, increased collaboration and renewed strategic performance across the organization.

Mitratech is a partner to more than 2,800 corporations and law firms of all sizes across the globe, equating to nearly 40% of the Fortune 500 and spanning over 160 countries. Mitratech continues to double-down on technology and resource investments, unlocking every door we can for customers to drive progress and impactful business outcomes for their organization.

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

MITRATECH

CONTACT US

We can help you meet your legal workflow automation demands *today*.

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