



automio
P R E S E N T S

THE LAW FIRM AUTOMATION PLAYBOOK™

• FIVE EASY WAYS TO AUTOMATE YOUR REPETITIVE LEGAL WORK •



**“The problem is not machines
doing what lawyers can do.
The problem is lawyers doing
what machines can do. If a
machine can do it. A machine
ought to do it.”**

- Jordan Furlong

Do you remember when you dreamed of being a lawyer?

You envisioned getting justice for the underdog, working with clever and inspiring clients and colleagues, doing interesting legal work that fulfilled you, making a real difference to people's lives, specialising in an area of law that really makes you tick, earning good money to give you and your family freedom and choices.

Those dreams were fun and motivating right?

The reality of lawyer life is quite different. You get bogged down in emails, meetings, paperwork, client demands, staff demands, Law Society requirements, timesheets, chasing overdue invoices, and bringing in more legal work....all this while trying to make budget for the month. You're exhausted and sometimes miserable. You don't have time for creating the lawyer life you dreamed of.

Let's change that. **It's 2018. You don't need to run your law firm like it's 1999.** Automating parts of your legal work will help you win back your time. So you can earn more and do the work you enjoy.

Often when lawyers hear about automation, they see it as a big, impossible monster. Who has time to automate and innovate when you've got clients to serve? But here is the thing: automating your legal work can start with simple, every day improvements to the way you do your legal work.

In this guide I walk you through five easy ways you can automate your legal work. I have used some examples and tips based on how I did things when I ran my law firm. Some of these things you can put in place within a day. Others may take longer to get going but you can start today. Once you've got them in place the result is the same: more time, job satisfaction and money for you. Oh....and happy clients. Everyone wins.

So, if you're ready, let the fun begin!



The Law Firm Automation Playbook gives you five easy ways to automate your repetitive legal work:

- 1. Online scheduling**
- 2. Client communications**
- 3. Electronic signing**
- 4. Repetitive legal work**
- 5. Client engagement**

1. Online Scheduling

**“It’s not that we have little time,
but more that we waste a good
deal of it.”**

- Seneca

How much time have you wasted emailing clients back and forth to set up meeting times? You can automate this by using online scheduling. It will help you save time and get more clients.

Online scheduling is software that allows people to schedule a time to have a meeting, phone call or video call with you.

Here’s what online scheduling does:

- **Easy scheduling:** Anyone with the calendar link can schedule an appointment with you online. They can choose an available time, and you can set how long each appointment will be. Clients love it.
- **Set your availability:** If you want to do meetings and take calls only during certain times of the day or on certain days of the week, you can set an availability window. People will not be able to set appointments outside of that window.



- **Calendar sync:** You can sync your online calendar with existing calendars. So you don't have schedule clashes. If you have time blocked out in your existing calendar, people will not be able to schedule appointments with you during that time.
- **Multiple appointment types:** You can set up different types of appointments for different purposes. One type for your current clients, one type for potential new clients, etc. You can set different appointment lengths and availability windows for each type of appointment.
- **Put it on your website:** You can set up a “schedule consultation” button on your website. Potential new clients on your website can click the button and schedule a meeting time that suits them. Potential new clients love it.

How do you get started?

Have a look at online scheduling software options. [Acuity](#) and [Calendly](#) are affordable and easy to use. Choose the one that's right for you and set up an account.



Online Scheduling Checklist:

- ☐ Choose online scheduling software (check out) and set up an account
- ☐ Sync your existing calendar
- ☐ Set up appointment types (1 hour appointments, 30 min appointments etc)
- ☐ Add the link to your online calendar to your website and email signature
- ☐ From now on, give people the link to your online calendar to schedule a meeting. No more back and forth!

2. Client Communications

“Get closer than ever to your customers. So close that you tell them what they need well before they realise it themselves.”

- Steve Jobs

Tools to manage your inbox are nothing new. But many lawyers fail to tame their inbox. Do you let your inbox bully you?

Streamlining your email communication with clients will save you hours every week. And your clients will be happier as they will be kept better informed.

Here's how you can use automation to tame your inbox:

Drafting Routine Emails

Lawyers send routine emails throughout the lifecycle of a file. An introductory email to a potential client, an email setting out the engagement process, a quick update to let your client know a document has been filed in court - these emails are quick to send, but collectively they're a major time sink.

Automating your routine emails is quick and easy. Most email providers let you set up template responses, allowing you to call up a precedent email in seconds. Some tools can even fill in the blanks with client details or use a logic tree to customise a template.

To set up template emails in Outlook see the instructions [here](#). To set this up in Gmail see the instructions [here](#).

Time and Event Driven Emails

Many email providers allow you to schedule emails to be sent at a given time - allowing you to draft time sensitive emails when it suits you, knowing they will be automatically sent when appropriate. This can also be useful for reminder emails.

For example, an immigration lawyer might set up an email to remind a client to make a visa application several months before their current visa or travel conditions expire. If your email is integrated with your client management software, events (such as a document being filed or signed) can trigger an update email or a reminder for you to call the client.

You may be able to set this up yourself if you're familiar with the automation features in your practice management software. Otherwise get your IT person to set this up.



Ensure Client Satisfaction

It's important to ensure your clients are satisfied with your work. Calling clients for feedback is time consuming. Client feedback surveys are the next best option - shortly after a matter has been completed, your practice management software can send out an email thanking the client for their business and inviting them to provide feedback.

You can set up a client satisfaction survey for free using [Survey Monkey](#). You can put a link to the survey in an email to clients automatically sent to clients at the end of a file. You can set this up yourself if you know how, or speak to your IT person.



Tame Your Inbox Checklist:

- ☐ Identify your routine emails as well as your time and event driven emails - look at your workflows and sent box to do this
- ☐ Write your email templates
- ☐ Set up your template emails (see [here](#) for Outlook instructions and see [here](#) for Gmail instructions)
- ☐ Automate the sending of your time and event driven emails from your practice management software
- ☐ Set up a Survey Monkey account and create a client survey
- ☐ Write the template for the email to be sent to clients with your client survey
- ☐ Set up client survey emails to be sent at the appropriate time in your practice management software
- ☐ Give a team member responsibility to report back and make recommendations regularly about client feedback received

3. Electronic Signing

**"I'm very thankful I can make
people happy just by signing
my name."**

- Yoko Ono

Faffing about with printers, scanners and counterparts to sign documents is so 1999. If you're still signing paper documents at your law firm, you are missing out on an easy way to streamline things.

Instead, use electronic signing software to automate and simplify the signing process. You'll save time. You'll also save money on paper. Plus clients love it (and prefer it). And you can get it all set up today.

What is electronic signing?

It is often defined as "an electronic sound, symbol, or process attached to or logically associated with a record....adopted by a person with the intent to sign the record." Electronic signatures can be used to replace handwritten signatures in nearly every personal or business process.

How can you get started?

Have a look at the different electronic signing software options - SignNow and DocuSign are two of the best and most secure - and sign up for an account.



Electronic Signing Checklist

- ☐ Choose your electronic signing software and create an account
- ☐ Train yourself on the software
- ☐ Put yourself in your clients' shoes - send documents to yourself for signing so you can understand how it works from a client's perspective
- ☐ Decide which situations you will use electronic signing for and write a procedure
- ☐ Train your team on how to use the electronic signing software and your firm's procedure
- ☐ Get feedback from your clients about your electronic signing procedure and improve it where necessary

4. Repetitive Legal Work

**“Efficiency and focus are the keys
to success.”**

- Robert Crais

Lawyers waste so much time collecting information from clients - whether it's during meetings or by phone or emailing back and forth.

And then they use it to inefficiently prepare legal documents - locating precedents, deleting out old client information, inserting new information, copying and pasting other clauses from other precedents, getting documents partner reviewed.....you know what I'm talking about.

This repetitive legal work often doesn't add value to clients, so why spend your time on it? Plus, there is so much room for human error.

To free yourself from document drudgery, you can roll out an automation strategy at your law firm. So you can save time to focus on what matters most. Oh and earn more \$\$\$ too.

Legal automation software automates repetitive legal tasks, like collecting information from clients and drafting legal documents. The software asks questions, and once answered, it takes those answers to instantly prepare customised legal documents. We call this legal automation software a Lawyer Bot.

How do you get started?

Some lawyers are already well down the path of automating their repetitive legal work. But other lawyers are only just getting started with automation, and some haven't started at all. So what sort of automation strategy should your firm adopt?



Here are automation strategies for every level:

Strategy 1: Automation For Beginners - Start Simple

Automation's biggest critics argue that it can't hack it when it comes to complex tasks. They're wrong, but even if you're very cautious there's no reason why you can't automate routine matters at your law firm.

Basic confidentiality agreements are a good example. Even though it can be hard for a lay person to get the language right, the content is almost always straightforward. A lawyer, legal executive or paralegal won't add a lot of value here - simply adding in the parties' details and briefly describing why the client is disclosing the relevant information isn't exactly complicated stuff.



The best way to automate the creation of documents like confidentiality agreements is to use a Lawyer Bot to internally create instant, customised legal documents for straightforward client matters.

Your clients don't even need to know you're using a Lawyer Bot if you don't want them to (even though most clients want to see their lawyers using efficient software). If you don't want your clients to know, you can use a Lawyer Bot in two ways:

- **Use the Lawyer Bot back at your desk:** You can interview your client and take notes as you normally would, and then when you get back to your desk you can answer the Lawyer Bot's questions to create the legal documents needed for that client. You can review the legal documents before you give them to your client.
- **Use the Lawyer Bot in your client interview:** You can take your laptop or tablet into the client interview with you and ask the client each question asked by the Lawyer Bot, and type the answers as you go. Once you've answered the questions, the Lawyer Bot will instantly prepare the legal documents your client needs.



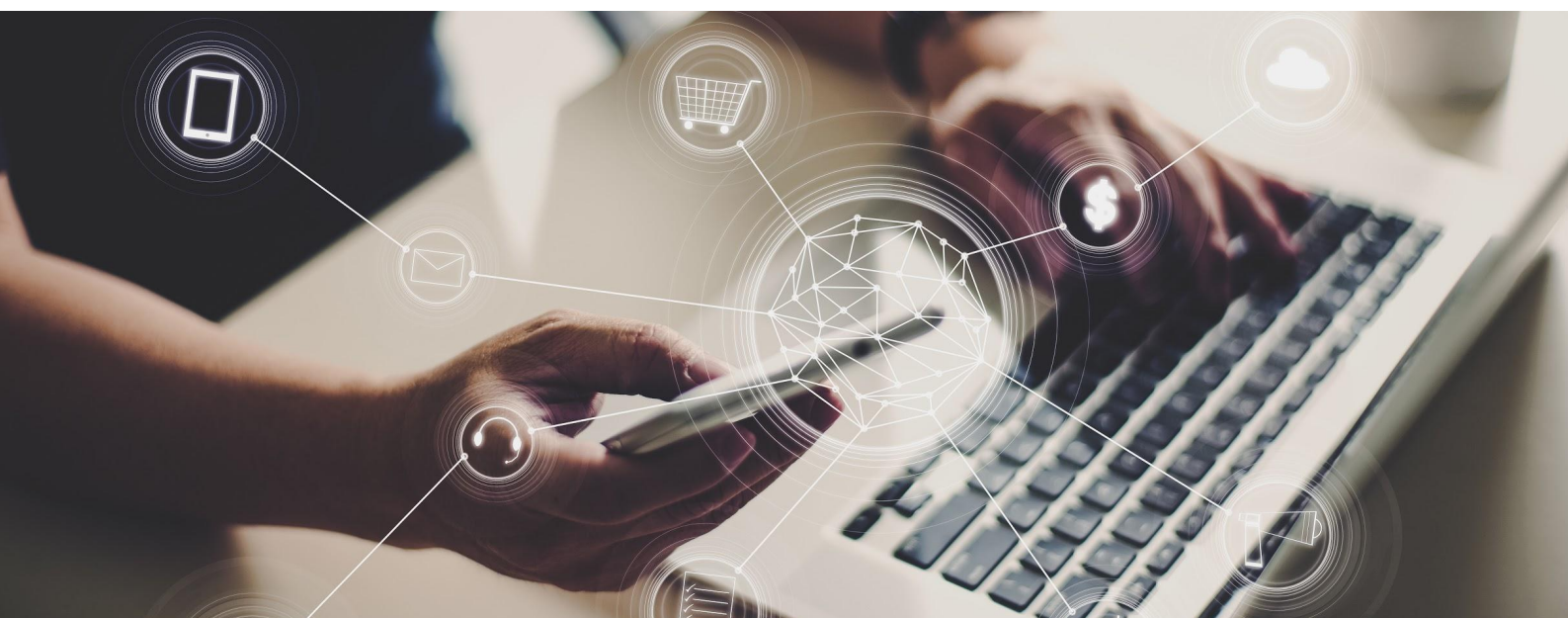
Strategy 2: Intermediate-level Automation - Let Clients Serve Themselves

The next step on the automation ladder is getting your clients to serve themselves. Instead of you answering the Lawyer Bot's questions, let your clients answer the questions online. This means the Lawyer Bot will interview your clients for you. It will then instantly create the customised legal documents you need.

This reduces the time you spend interviewing clients and collecting information, as well as preparing legal documents. Clients love it as they can do the interview any time, anywhere and on any device. If they don't know the answer to a question, or they have to go off and locate some information or a document, they can do that and come back to the interview later.

Example: a client contacts you about changing the trustees of their family trust. You send your client a link to the Lawyer Bot (which you can put on your website if you want to) that will ask the client questions about their change of trustees, and your client will answer these questions. The Lawyer Bot will then instantly prepare a deed of change of trustees, trustee minutes, new client matter form, letter of engagement and any other documents the automation software has been trained to prepare. You can choose whether you want to review the legal documents first, or for the legal documents to immediately go to the client.

Another good time to let your clients serve themselves is to assist with your AML/CFT compliance. Instead of having to interview each client by phone or in person, or sending them a clunky form to fill out, to collect the information you need for Customer Due Diligence, get the legal automation software to interview your clients online.



Strategy 3: Automation For Legal Innovators - Selling Online and Reselling

As a legal innovator, you may already have a team of Lawyer Bots that interview your clients and prepare customised legal docs for them. You are happier because you get to spend more time doing the stuff that spins your wheels. And you earn more too.

You can see your Lawyer Bots are your valuable intellectual property. And you're keen to monetise them. The next step on the automation ladder is to generate revenue from your Lawyer Bots, which you can do in two ways:

- **Sell legal documents online:** You sell the legal documents created by your Lawyer Bots as self-service products to clients and non-clients. This means you can sell your killer shareholders' agreements to startups that aren't actually your clients. And the added bonus is that this becomes a client acquisition tool. You can make it easy for startups that buy your shareholders' agreement to become paying clients when they need legal advice.

You could sell legal documents from your Lawyer Bots as one-off products. Or, you could create a client-only area of your website that has all your Lawyer Bots (plus helpful videos and guides). Your clients pay you a monthly subscription to have access.



- **Sell your Lawyer Bots to other lawyers:** You sell your Lawyer Bots to other lawyers and law firms who resell them to serve their own clients. To do this you collaborate with other firms to market the Lawyer Bots you've got, and to find out what Lawyer Bots they've got that you could resell to your own clients.

For example, you're known for having a killer shareholders' agreement for startups. Other legal innovators in your jurisdiction know about it. They resell your shareholders' agreement Lawyer Bot to their clients, and you clip the ticket every time. **This is how you start earning passive revenue.**



Repetitive Legal Work Checklist

- ❑ Choose an automation strategy (but before you do, read [this blog post](#))
- ❑ Get your team involved
- ❑ Choose your firm's top 10 legal documents or processes you would like to automate - it's best to start with quick wins, so choose basic documents that you use the most
- ❑ Choose a legal automation software provider
- ❑ Build your Lawyer Bots (or get your software provider or a consultant to do it for you)
- ❑ Make time to use and test your Lawyer Bots - get to know them
- ❑ Update your firm's processes - make it clear when Lawyer Bots are to be used as part of these processes
- ❑ Train your team on how to use your Lawyer Bots and the updates to your firm's processes
- ❑ Let your clients know what you're doing with Lawyer Bots - they'll be impressed and it will help you win new clients.

5. Client Engagement

“Do what you do so well they will want to see it again, and bring their friends.”

- Walt Disney

Streamlining your new client engagement process will help you win back time every week. And it helps your clients be more efficient too.

This one has been left until the last section in this Guide because you will need online scheduling, electronic signing, email templates and Lawyer Bots set up.

Here's a more streamlined engagement process for new clients:

Step 1: Schedule initial consultation

There are two ways a new client can schedule an initial appointment with you:

- **By clicking on the “schedule appointment” button on your website:** This will take them straight to your online calendar where they can book an appointment.



- **By phoning or emailing you:** As soon as you get the call or email, send an email to the new client with a link to your online calendar so they can book an appointment.

Hot tip: You can set up different meeting types in your online calendar, like “*in person meeting - 1 hour*” or “*meeting by Skype - 45 minutes*”, for your clients to choose from. Meeting with you by videoconference rather than in person will suit a lot of people.

Step 2: Send email to new client

Once a new client schedules an appointment in your online calendar, set up an email template in your online scheduling software to be automatically sent to the new client:

Hi [First Name]

I'm looking forward to meeting with you to discuss how I can help you with your legal matter. I confirm we are meeting [in person at [Address] / by Skype at [this link](#)] at [Time] on [Date].

Before we meet could you please answer [this online interview](#) - it will take you less than 3 minutes to complete.

I look forward to meeting with you.

Best regards,

[Your Name]

[Your email signature with contact details]

Please note: the Skype and online interview links in blue text in the email template above will need to be inserted into your email template.

Step 3: Online interview

The link to the online interview in Step 2 will take the client to an onboarding Lawyer Bot you've created. The Lawyer Bot asks the client for the information you need to set them up in your practice management software or CRM. It will also ask questions about the issue or opportunity they need your help with. This gives you a heads up about what they want to talk to you about.

The client will answer the online interview at a time convenient to them. If he/she doesn't know the answer to a question they can go away and come back to the online interview once they've found the answer. The online interview will save all answers, even if the client has to go away and come back to it.

Once the client has finished the online interview, you are notified of this by email. The Lawyer Bot instantly creates a customised letter of engagement based on the new client's answers. You can hold on to this draft letter until after you've met with the client (see step 5), and then make any tweaks necessary before sending the terms of engagement to your client.

You can also get the client set up automatically in your practice management software or CRM. This can be done by integrating your Lawyer Bot with your practice management software, or by using [Zapier](#).



Step 4: You meet with the client

By the time you meet with the client you already have all their client information and basic details of their legal matter. You can impress your client by diving straight into their issue. And you don't need to waste precious time on filling out new client forms.

Hot tip: for online meetings use Zoom, Suitebox, Skype or GoToMeeting.

Step 5: Send letter of engagement

During your meeting you'll find out any extra information you need to update the letter of engagement and the client details in your practice management software or CRM. Then you can send the letter of engagement to your client using the electronic signing software (see section 3 of this guide).

Final Words

I hope your law firm automation is going well. If you ever have any questions about it, please feel free to send me an email to claudia@autom.io.

Also, if you are keen to find out how Automio's intelligent Lawyer Bot platform can help you save time and earn more, you can [schedule an online demo here](#).

Thank you and have a fabulous day!

Claudia King

CEO & Founder of Automio