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Alberta Legal Technology Conference

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LAW FIRM AUTOMATION

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INTRODUCTION

How do I successfully implement technology efficiencies and tools without being an international size law firm?

In the context of legal practice, automation is the technique, method or system of operating or controlling a process by highly automatic electronic devices and software designed to reduce or simplify human intervention in the creation of a work product. The objective of automation is to reduce the time consumed in accomplishing a task, reducing staffing costs, reducing mistakes, and increasing the likelihood of consistent accurate results.

In this paper we will focus on three elements of automation:

- Discovering how you do things now,
- Surveying and using tools you already have, and
- Looking to the future of law firm automation.

DISCOVERING HOW YOU DO THINGS NOW

Always keep in mind that automating a flawed process just lets you make your mistakes faster.

Before deciding whether, how, or if automation can be of assistance, you need to start by doing a careful analysis of how work elements are presently done in your practice. This exercise is called *process mapping*. That will help you understand how you are doing things presently but undoubtedly will reveal opportunities as to how they could or might be done better (with or without automation).

One normally starts with a simple project, and out of it you create a free form check list or process analysis. Common starting points are processes like:

- Opening a file,
- Incorporating a company,
- Preparation and filing of annual returns and minutes, or
- Creating testamentary documents.

You are attempting to identify the steps that are required 80% of the time. There will always be a requirement for bespoke work products, but if your automation system works in 80% or more of the circumstances, you are likely to receive the greatest return on your investment of effort by focusing on automating the 80%.