

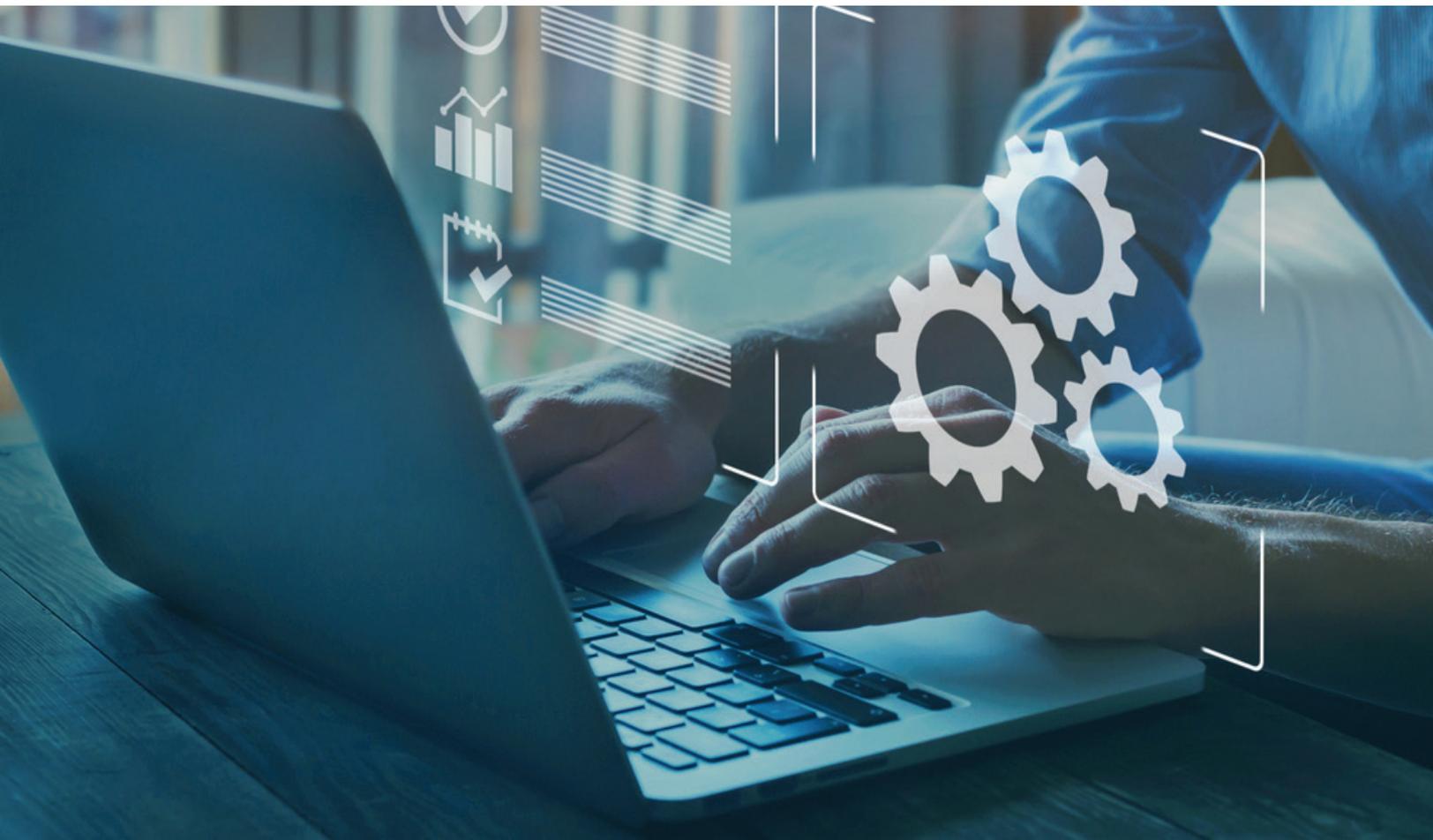
WHITE PAPER



SmartAdvocate[®]

A Smarter Way to Manage Your Cases and Your Firm

The Benefits of Automation: Modernizing Your Law Firm



Why Automate Your Law Firm?



- **Efficiency** Stripping tasks down to their simplest forms and then analyzing the time required, can shine a light on how to maximize your staff's productivity. The ability to automate greatly reduces the time and effort that menial, non-billable tasks require. An automated law firm capitalizes on that time.
- **Accuracy** It is well documented that the more times a task is repeated, the more likely inaccuracies occur. Automation guarantees completion of tasks, to the exact standards you specify. Strong case management software, built around automated procedures, makes relentless accuracy the norm.
- **Client Satisfaction** Keeping current clients satisfied is critical, but your bottom line depends on a balance: Your attorneys also need to bring on and foster new clients, and nurturing a positive attorney-client experience requires careful attention. Automation assures more of this follow-up without having to dedicate more time. This translates into increased revenue.

SmartAdvocate has been automating law offices for close to 20 years. Our focus of creating the tools and functions required for staff and attorneys to maximize their firm's abilities, gives us first-hand knowledge of the benefits of automation. It is a necessary foundation for any firm to stay competitive and to also be prepared for more complex technologies to come.

Law firms that fail to consider automation and its functionalities, are bound to lose their competitive edge. It is crucial to analyze your firm's current position and where you need to be in order to improve your bottom line, maximize productivity of your staff, and elevate your clients' experience with your services.

Automation in the Law Firm

What does "law firm automation" mean? Over the past two decades, the definition has evolved. It has come to represent the implementation and application of technology to a law firm's data management, information transfer, communication, and all related tasks. Automation guarantees these tasks are done accurately and efficiently, so that firms can focus on the work that truly adds value for its clients.

Tom Mighell is a published author, blogger and noted legal technologist. He describes the benefits of [automation](#) templates and tools as "...getting out of it what you put into it. It

requires that your initial templates need to be pristine and perfect because that's where the time-saving comes in. The confidence is knowing that the document (aside from the customizations you're making), remains the same. You don't have to change it and review it, because you put the work into it during the development of the template."¹

**Get out of it
what you put
into it.**

Consider this example: The creation of a standard pleading is something that a firm files case after case. A staff member could pull up a past pleading and use it as a template, filling in the blanks in their word processing program. But how long does it take that staff member to look up and insert that information, versus using an automated procedure to input merge codes to import information from the file? While most attorneys and administrators recognize that automation can save the firm time and effort, many have not yet internalized the most important point: For many processes, automation is not just faster, it substantially reduces the risk of human error.



From “Cloud-averse” to “Cloud-first”

Although the pandemic may have accelerated the decision for some law firms to switch from server storage to the cloud, it is likely that improvements in technology and innovation had them heading that way regardless. According to the Flexera 2021 [State of the Cloud Report](#), which highlights the latest cloud computing trends focusing on cloud buyers and decision makers, they found that usage is growing at its fastest rate yet. In addition, companies are becoming more comfortable with having sensitive data stored in the cloud².

1. “I Just Wanna Automate, Automate.” Legal Talk Network, 12 Aug. 2021, legaltalknetwork.com/podcasts/kennedy-mighell-report/2021/08/i-just-wanna-automate-automate.
2. “Cloud Computing Trends: 2021 State of the Cloud Report.” Flexera Blog, 15 Mar. 2021, fxb-buyer.com/cloud/cloud-computing-trends-2021-state-of-the-cloud-report/

In the ILTA's (International Legal Technology Association) [2021 Technology Survey](#), they found that "cloud-first philosophy was even higher than expected with the pace of movement to cloud-based DMS." Law firm data results showed that every system listed in the survey as already "located in the cloud or being migrated to the cloud within the next 12 months" increased significantly over the past year. Overall, the results pointed to what cloud users already know: The cloud represents innovation and is a vital step to keeping up with the complex demands of the ever-changing landscape³.

Benefits of Law Firm Automation

Efficiency

The most frequent rationale for automation is to save time, but how much time does it actually save? And, what does that time saved mean for your firm? It is easy to underestimate the value, because common tasks that can be automated do not take long to accomplish manually. For example, sending an email to a client with a court date may only take a minute or two, in addition to the time it takes to switch gears, pull up contact information, and switch gears again. While those few minutes likely do not seem critical, when you multiply them by the number of short, informational emails you send out across the course of a day, or a case, or a year, it adds up.

**Automation
means time
and money
saved.**

Consider the difference between merging information into a document and filling in blanks in a template. It may take a \$30/hour paralegal 20 minutes to look up information and type it into a template, but it takes only two minutes to merge that information into the same document. It may not sound like much, but how many pleadings does a busy paralegal generate during a pay period? If they are creating even just five or six pleadings each day, nearly ¼ of their salary is paying for wasted time. Even with only one pleading per day, that is \$45 per



3. International Legal Technology Association (ILTA), Technology Survey 2021.

week or over \$2,000 a year that could be saved by using a good document management system - and that is just one document type and one employee. You can make this type of calculation for any task that can be automated.

Imagine a system in which routine emails are auto generated, all repetitive pleadings are created through near instantaneous merge functions, and scanned documents automatically attach themselves to the appropriate case files. You do not need to imagine this; you simply need to research your options and then choose to implement it.

For a plaintiffs' firm, investing less time to accomplish the same result means a higher return on investment. It also means the ability to handle more cases without increasing staffing or the hours each staff member contributes. For a defense firm, it means greater cost efficiency, which plays an important role in client satisfaction and retention. For litigation firms on both sides of the aisle, it means that attorneys and paralegals have more time to devote to the work that truly requires their skills, no longer spending their days on busy work. A few of the core ways in which automation can save time for your law firm include:

- Document assembly solutions can eliminate the need to recreate commonly used documents.
- Clients can receive updates and reminders with automated emails and texts, whenever triggering events occur.
- Scanned documents can be automatically attached to the appropriate file, saving precious time usually spent processing and searching for them.
- Ability to quickly generate documents to send to clients for e-signature via email or text.

Accuracy

Every manual operation in a law firm is an opportunity for error, and the more times a task is repeated, the greater the opportunity for error. With good staff, of course, these errors are kept to a minimum. Mistakes do happen, and the consequences can be serious.

Automation has the ability to guarantee the completion of menial tasks with no errors, and the ability to set triggers for when these tasks are completed. Automation may even allow your firm to execute tasks that previously would have been otherwise impossible. Some examples of increased accuracy through automation include:



**Enhancing staff
performance
and client
experience.**

- Directly export data from the file to documents and pleadings to eliminate typographical errors/omitted information.
- Avoid missed critical deadlines by automatically populating staff and client calendars.
- Set automated follow-ups to ensure important information doesn't slip through the cracks.

Improved Client Satisfaction

Attorney-client relationships differ for plaintiffs' and defense firms but are equally critical to the success of your firm. Client satisfaction impacts your practice in many ways, including:

- The likelihood of repeat business and referrals from that client.
- The efficiency with which you work with the client.
- The ease of collecting payment from the client and a reduced likelihood that your billings will not be disputed.

Client satisfaction means positive engagement and growth for your firm. Your clients' experience can be efficiently increased via automation in the following ways:

- The ability to give clients instant access to their case information, including documents, case calendars, notes, and more. This will also free up staff time for other responsibilities.
- Automatic updates to let the client know how the case is progressing.
- Reminders of court dates, deadlines, and other critical information.

In addition, the increased efficiency reduces hourly billings for tasks that do not require attorney attention. This frees up time to work on higher level tasks and reduces the likelihood of billing challenges. Many corporate clients are carefully screening their bills and pushing outside counsel to operate more efficiently.

The Time Has Come

The days of piecemeal assembly of law firm technology are gone. A case management system that integrates with existing tools like email and Microsoft Word, further increases efficiency and minimizes the opportunity for error. It ensures that all of your information relating to a case or client is stored in one place, easily retrievable, and entirely consistent. With more plaintiffs' and defense firms taking advantage of the efficiencies and safeguards offered by automation, a firm lagging in this area is at a significant competitive disadvantage.

SmartAdvocate is the Solution



While many firms are specifically seeking out separate software to automate workflows, communications, document assembly, and other aspects of the litigation process, the real answer may be easier than you think. An integrated case management platform like SmartAdvocate offers:

- Thousands of pre-defined merge codes for just about every step and document in the case management process, along with the ability to create your own, allowing you to generate easy templates for all your regular processes.
- Automated email, text updates, and reminders, plus the ability to obtain your clients' e-signatures on critical documents.
- Automatic calculation and calendaring of statutes of limitations and other critical deadlines.
- Barcoding to ensure that scanned documents are automatically affixed to the appropriate file.
- Automated follow-up on discovery and medical record requests.
- Dozens of automated reports and dashboards for internal use or to share with clients.

If you are ready to maximize efficiency within your law office, reduce your costs of operation, cut down on the opportunity for error, and provide improved client satisfaction, then it is time to learn more about the SmartAdvocate legal case management system.

SmartAdvocate®

A Smarter Way to Manage Your Cases and Your Firm



About SmartAdvocate®

SmartAdvocate is a fully integrated, award-winning legal case management system made to handle the challenges of today's fast paced, highly competitive and technologically demanding world. Initially designed by and for, personal injury and mass tort litigation firms, it is now used by a wide range of practices.

SmartAdvocate's robust, exclusive Internet-based features, will enable firms to manage, store, track, classify and communicate like never before, ensuring that they achieve the highest level of success. Plus, with 125+ integration partnerships, firms are able to customize SmartAdvocate to achieve exactly what they need. This revolutionary software will increase your practice's efficiency and profitability.

Learn how your firm can benefit from SmartAdvocate today.

www.smartadvocate.com

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