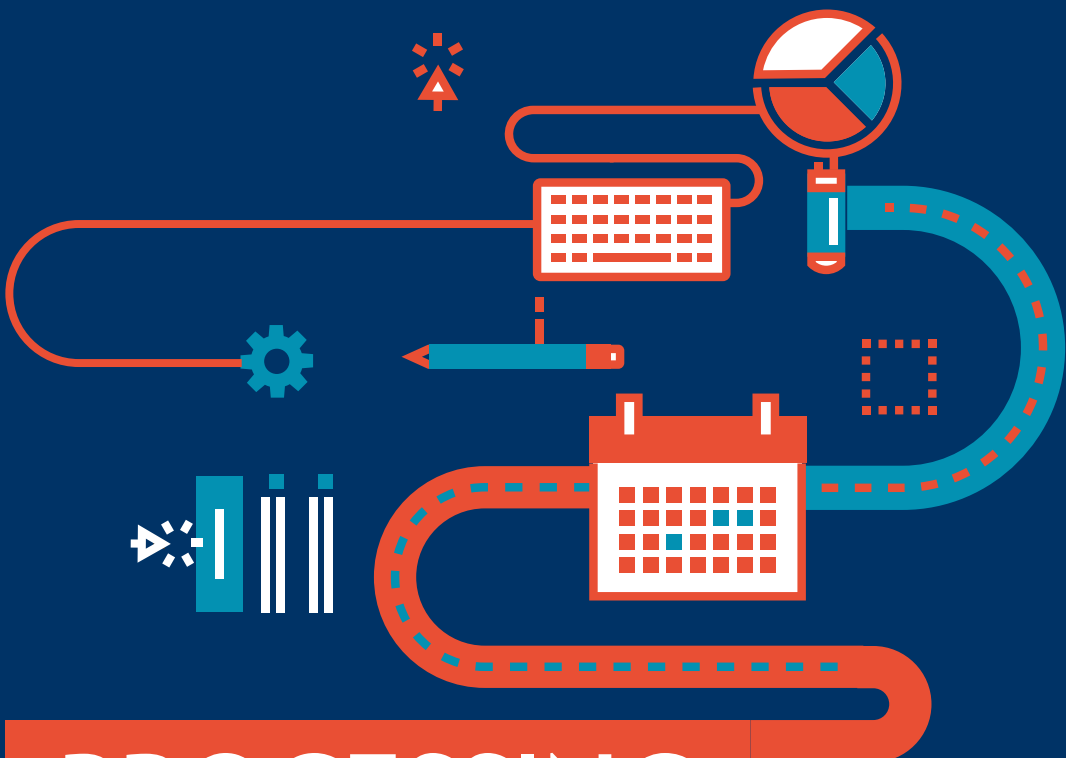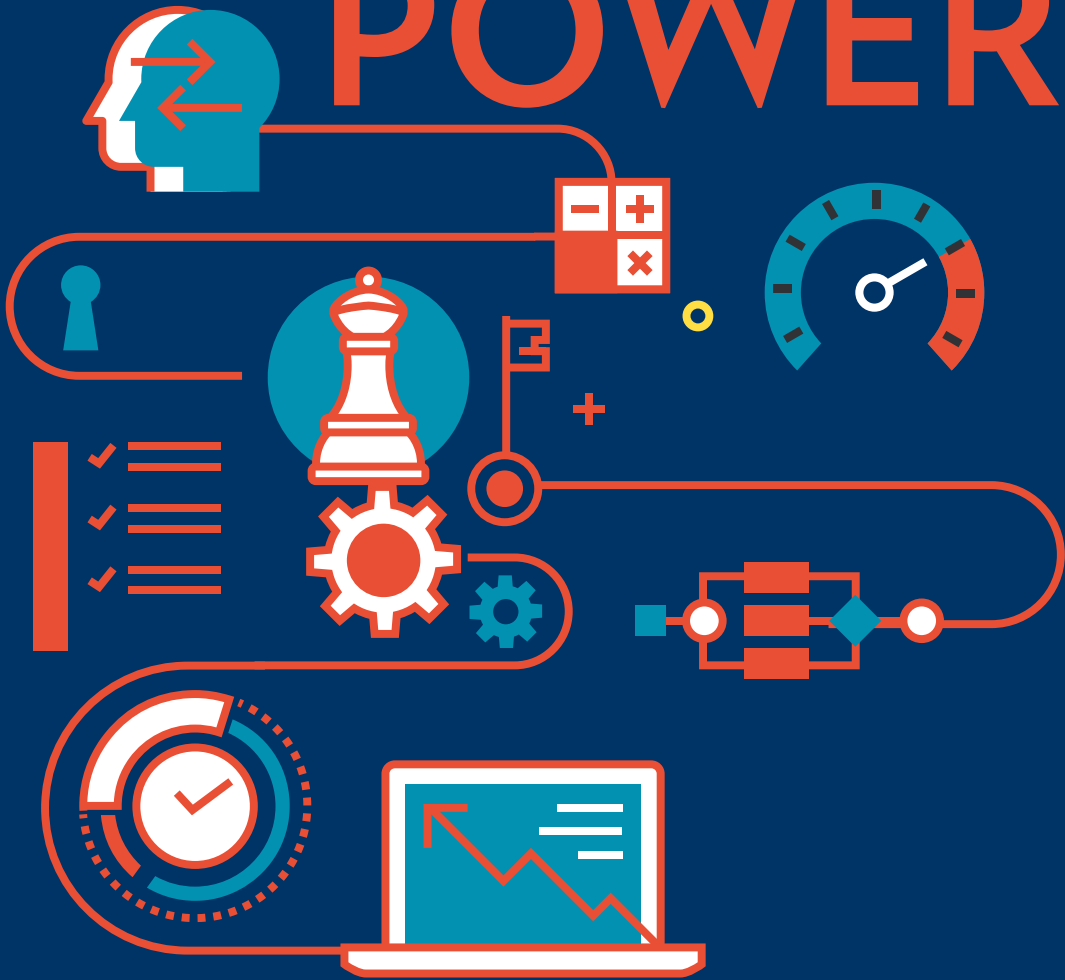# Briefing

CHECK AND AUTOMATE

Where – and why – is legal business learning to love process automation?

PROCESSING
POWER

introhive

intapp.

the answer company™
THOMSON REUTERS®

iManage

16:47
Tuesday, 3 April

💬 3m ago
Boss, The
Are we going to make the deadline?

Earlier Today ✕

✉ 28m ago
Leslie
Are we still on for later? xxx

✕

✉ 57m ago
Boss, The
Are all those T's & C's standardised yet?

Say 'yes' with Contract Express.

Thrive amidst the pressure and pace with document automation from Contract Express. Get trusted solutions that make you faster, more accurate and more consistent.

When you have more time and can add more value, what will you be able to say 'yes' to?

legal-solutions.co.uk/sayyes

WHO WE ARE...

Briefing is published by Burlington Media Group, the only media and events business focused on legal business services

Richard Brent is the editor of **Briefing**. He likes to get out and meet as many readers as possible, so contact him at richardb@briefing.co.uk

Kayli Olson is **Briefing**'s assistant editor, in charge of gathering stories and data. Want to contribute? Contact: kaylio@briefing.co.uk

Holly McDaid is **Briefing**'s client services executive, responsible for managing all our supplier insight. Contact: hollym@briefing.co.uk

Rupert Collins-White is editor-in-chief of **Briefing** and creative director at Burlington Media. Contact: rupertw@briefing.co.uk

Sarah Cox is Burlington Media's head of client services. Contact her at sarahc@briefing.co.uk

TALK TO US

Briefing on Twitter
@Briefingmag

Email us your thoughts
editorial@briefing.co.uk

Find all our back issues online
www.lsn.co.uk/Briefing

Join the **Briefing** LinkedIn group
bit.ly/BriefingLinkedin

Write us a letter (remember those?)
**Briefing magazine
Burlington Media Group
20 Mortlake High St
London SW14 8JN
DX36356
EAST SHEEN**

SPONSORED BY

introhive

Intapp™

the answer company™
THOMSON REUTERS®

iManage
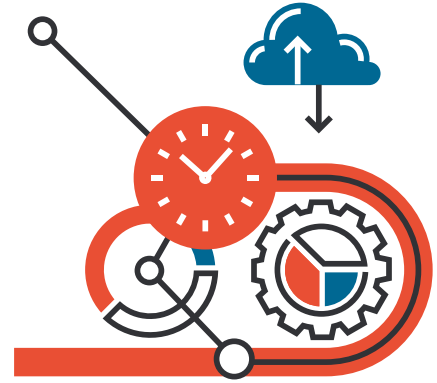
Best automate?

When **Briefing** polled the community in a piece of annual research back in late 2017 (Legal IT landscapes) one of the results that gave greatest pause for thought was the significant 'automation gap' at our leading law firms. You told us you are automating a lot less legal and business services workload than you think it's possible to automate.

This month's **Briefing** spotlight supplement seeks to dig beneath that basic finding to get a clearer understanding of what's driving firms to automate, and what, if anything, is preventing them pursuing more opportunities that would make a solid strategic and financial difference.

The overall business case is pretty clear to me – more efficiency and consistency, as what ought to be your more straightforward tasks aren't subject to the potential human error and wasted effort that arises when people attempt to follow processes themselves! There's a very obvious link between efficiency as a driver and the client – cost savings can, of course, be passed on as value – but also with profitability, as firms simultaneously embrace 'smarter working' policies. Consider the impact, for example, of automated billable-time capture and classification, as fee earners spend so much more time away from their desks. Or the ability to generate on-demand management information and business intelligence reports that highlight precisely the pieces of data you have to prep to make a client conversation really count. Now there's no more to plough through than is strictly necessary, but also no less than you can immediately summon to create a super-compelling pitch, seamlessly convert a prospect, or profitably cross-sell into a new practice area.

So, it's a tad ironic to me that although automation is supposedly all about freeing people to focus on fewer administrative and more value-contributing business activities, we hear it has a tendency to tie management up in a few new knots. Automation is there to cut through complexity for people, but I guess it can't do much – for the time being – about the complicated individuals themselves.

RICHARD BRENT EDITOR

Contents

◤ FEATURE

Arts of the process

There are plenty of business cases for automation of legal business process. One of the biggest problems of all may be deciding what to prioritise, hears Richard Brent

Today, automation is often spoken about in the same breath as artificial intelligence (AI) – very possibly because the latter generates a very generous helping of headlines. Rarely does a month now pass without a new report predicting AI-powered transformation of the future workplace. Or – the flip side – warning that without robust oversight an increasingly robotic world poses societal risks ranging from facilitating cybercriminals, to job losses, or even the classic cautionary tale of machines that eventually refuse to obey their trainers.

The impact of technology on the future of employment of course been fuel for considerable debate; perhaps even more so in the legal industry since a group of larger firms started work with some notable 'AI' brands back in 2016. More broadly, a survey conducted by the non-profit Computing Technology Industry Association (CompTIA) in October 2017 finds "loss of jobs" is indeed the biggest "perceived drawback" to introducing automation (mentioned by 46%) – although it should be said this is a poll of the workforce at large.

However, there is then a cluster of drawbacks

maintaining profitability, applying more process and consistency to work where possible is surely an obvious business case to consider.

Andrew Woolfson, until recently director of knowledge management and capability at RPC, says: "Robotic process automation [RPA] is becoming normal in the business of law, as it covers the automation of standard processes, of which there are many in firms today. The recent change is accepting processes such as client due diligence and conflict checks can be carried out by simple RPA."

Indeed, Stuart Hopper, head of practice development and knowledge, EMEA, at Dentons, says the decision is no longer really whether to invest in automation, but what to prioritise, and who to pick to help you deliver it: "The momentum is so great now that the challenges we're grappling with are increasingly around how to identify, evaluate and prioritise technologies and choose from a competing mass of alternatives."

Custom grade

In the absence of any other guide as to what to choose – although not necessarily the case – it would perhaps be surprising if firms didn't choose areas where clients are most likely to notice the improvement. The right client, significantly happier, is arguably a business case in itself.

Herbert explains: "Increasingly, businesses identify improvements in the customer experience as a goal for their investment in new technologies. These could be brand new customer experiences on mobile devices, or in virtual spaces, for example. By collecting customer data (in a responsible way) and feeding the data into a profile, companies can interact with customers in a more personalised way."

Ginevra Saylor, national director of knowledge and innovation at Dentons Canada, says: "We listen to our clients and, when appropriate, offer to develop custom solutions for consuming work product in more efficient ways that often go directly into the hands of our clients' personnel in the field. For instance, in Canada we've developed automated tools that our client's HR personnel can use to generate employment letters that are consistent across locations and compliant in each jurisdiction, as well as tools to provide specific regulatory requirements for different activities.

"I've seen it in virtually every area of practice and each day new applications to law are surfacing. To say technology is transforming every aspect of

mentioned with around the same frequency – the first being that businesses may need "additional support" for an automation strategy (43%). This is followed by the spectre of "unexpected behaviour" arising (42%) and difficulty handling any integration with other systems (41%).

On the other hand, it will come as little surprise that the top perceived benefits of the technology are all about the reduction of complexity – ideally leading to increased efficiency. Automation will lead to fewer mistakes say 55%, lower costs (51%) and higher productivity (51%).

Tim Herbert, senior vice president of research and market intelligence at CompTIA, says: "These three factors are closely aligned. Companies are more aware that user error can throw a wrench in business operations, and they want to eliminate missteps in processes that should have predictable results. But eliminating the human worker from the task should also result in greater productivity, since machines, robots and other tools of automation don't expect lunch hours, bathroom breaks, sick days and vacations as their human counterparts do."

So, in a climate where legal is challenged to provide more value to clients while also

"The opportunities for combining legal acumen with technology to deliver just-in-time advice directly to the individuals who need that information are limitless."

Ginevra Saylor, national director of knowledge and innovation, Dentons Canada

legal practice and area of law is an understatement. The opportunities for combining legal acumen with technology to deliver just-in-time advice directly to individuals who need that information are limitless."

Hopper gives another example, this time at work for the firm in the EMEA region. "There's work we're doing with an automation platform to enable a particular client's fieldworkers and contractors to generate contract and licence documents directly onsite for improved efficiency and better risk management."

Data DIY

Of course, where this thought of making business life ever more convenient for clients eventually leads is the concept of 'self-service'. In November 2017, for example, Dentons's venture technology and emerging growth companies group launched an automated seed financing document generator – enabling startups and investors to build their own term sheets, subscription agreements, shareholder agreements and share terms – through a website, at no cost.

Other firms, such as Taylor Wessing, have developed apps to help clients assess their exposure to changes in regulation. Replacing an initial consultation, they can instead answer a set of questions to get to grips with the scope of the advice that might be needed in their own time – and in some cases, automation could even generate a quote for a fixed fee arrangement.

Karim Derrick, head of research and development at Kennedys, says: "'Use lawyers less' is very much the mantra." The firm's website states: "Use 'real-world' lawyers only when you really need one."

Derrick is honing a toolkit of products with elements of automation – perhaps the best known of which is online claims litigation tool KLAiM. A traffic-light system guides insurers through the process, enabling settlement where primary liability is admitted and auto-populating court documents in line with standard procedures. It's now planning to expand into both new workflows and jurisdictions, and it invites client input into

the potential directions.

Other applications in the kit include a risk-management mobile app for capturing information at the scene of injuries (@scene), online negotiation (Cybersettle) and a fraud detection tool (Ki).

But if a firm is enabling clients to take work on themselves, it will almost certainly want to see some efficiencies on the inside. Derrick says: "A significant part of my work is now turning these tools into a unified platform, putting the components together in different ways. The trick is to avoid reinventing the wheel – minimising rekeying and the time you spend coding."

He adds: "But data fuels the automation drive even more than the applications themselves. We can generate data models, which will, in time, drive the application."

And in a world where 'the law' is increasingly less of a differentiator, perhaps it's data that needs to take its place in the value chain – ideally delivered through automation. For example, another part of the Kennedys package is analytics focused on predicting the future shape and progression of emerging risks. "We've a lot of the intelligence, but the platform should automatically deliver that to the right people, at the right time," explains Derrick, adding that partners Richard West and Martin Stockdale are also particularly excited by the potential of emerging blockchain technology to handle insurance work. The perhaps inevitable hype-bubble in this area risks confusion – "some things that are talked about as blockchain aren't blockchain" – but he says there's no reason the process of handling an incident such as a car accident couldn't be entirely automated. "Firms would all be able to write the relevant claims data, but without exposing it."

At the same time, firms probably need to factor in that, should they eschew greater automation, an increasingly diverse base of competition might look to capitalise on that. For example, in March 2018, alternative legal services provider Axiom launched its BrexitBridge solution, with modules for different phases of a project involving review, revision and even renegotiation, of affected

How modern legal professionals work

iManage Work 10 is the best-in-class document management solution that puts documents and emails at your fingertips, quickly and securely on any device.

- Designed by lawyers for lawyers to make you more productive
- Work smarter with embedded RAVN AI-enhanced features
- Mobile-friendly design—work from anywhere
- iManage Cloud—the industry's most scalable and reliable cloud service

Take a quick video tour of all the new features of Work 10: **imanage.com/Work10-Briefing**

iManage

2017 WINNER
ILTA'S DISTINGUISHED PEER AWARDS
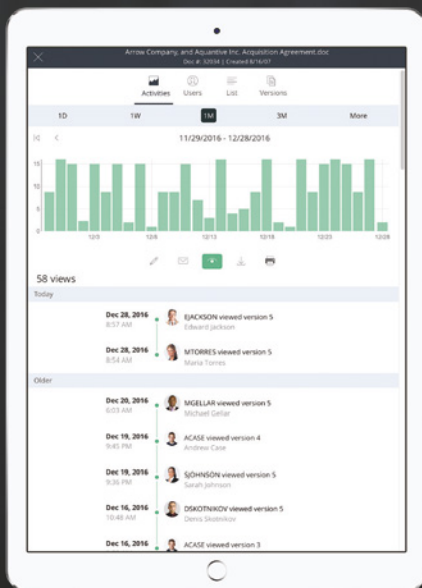
INNOVATIVE SOLUTION PROVIDER OF THE YEAR

contracts, including supplier agreements, loans and non-trading contracts. Its AI, it says, can efficiently package up existing contacts, but also convert unstructured contract text into structured data detailing trends, risks and opportunities, and then automate new document generation and counterparty outreach, while continuously tracking contract status during renegotiation.

Chris DeConti, executive vice president of global solutions at Axiom, said back in March: "Brexit requirements cut across such a wide range of contracts and cover so many lines of business that legacy models for handling this work are untenable. The scale of the Brexit challenge cries out for a different kind of solution."

Priority problem?

This all begs the question: why aren't law firms in general automating rather more? **Briefing**'s Legal IT landscapes 2018 report identified a significant 'automation gap' at top 100 firms. Presented with a scale of one to 10 to indicate how far they have already automated what they deem automatable, our sample of legal business leaders could only claim an average 3.1. But asked how automated legal work could potentially be – with technology available on the market today – they ventured an average of 6.8. The gap is striking.

Derrick says: "It could be a happy accident that I picked a firm with quite a narrow focus – I'm sure it will be more challenging in other firms, because there's a much greater breadth of possibilities." This returns to Hopper's point about time spent working out what to prioritise. Perhaps firms simply have too much choice, which instead potentially risks inaction.

Andrew Woolfson explains: "There is to a certain extent a barrier in taking RPA into more complex processes, such as searching and reviewing records, as it depends on use of complementary technologies such as natural language processing. Otherwise, the main barrier is management focus and attention in how technology can best be used. But the future for RPA looks good, as the trust in technology improves and applications become simpler to execute and manage.

"The biggest efficiencies should be seen in client onboarding and related processes. Gaining significant efficiencies in more lawyerly applications most probably requires changes in business models and commercial strategies."

Herbert at CompTIA adds: "Given the

incredible new capabilities that exist for automating tasks, the perception exists that automation is a highly complex activity, involving new streams of data, new machine-learning algorithms and new robotic devices.

"The scope of tasks being performed is perhaps the biggest source of confusion when it comes to automation, whereas thinking about things on a smaller scale makes automation much more attainable for businesses of all sizes. Reducing the overhead on a single task (such as the use of marketing automation within a CRM application) can provide a tremendous boost to productivity."

In 2017, Kennedys also invested in an offshore operation through a partnership in India, which is helping R&D to "fail faster," says Derrick. "They work on all sorts of automation and AI projects, but critically are set up to try things especially quickly to identify what can and can't be done."

Hopper at Dentons adds: "We've found that behaviour change is the key – especially in the law, where risk aversion is built into law firms' work products. Advice has to be right first time, so the 'fail fast and move on' mentality of Silicon Valley has far less traction."

Saylor agrees. "People are comfortable with routine. What they know with certainty gets the job done well. So, change is often met with a healthy dose of scepticism, and some trepidation that a working system will now be broken. But once the substantial benefits to both individual and organisation are demonstrated clearly, and in terms that have meaning to those who will be affected, these challenges are overcome."

Indeed, alongside improved customer experience (47%), another benefit named in CompTIA's research is "more bandwidth for innovation." The case needs to be made that the time savings derived from automation don't necessarily mean less work for people, but rather more interesting work for them elsewhere.

As Saylor at Dentons puts it: "Combining artificial intelligence, machine learning, and human expertise to deliver better solutions faster will free lawyer time for developing creative strategies and innovating new and better legal services and products for clients.

"So, you may not be doing less work, but simply better work. Additionally, given that automation benefits clients in terms of both efficiency and quality, firms that excel with this are likely to bring in greater volumes of work. So, the impact on the size of the workforce is uncertain." ◣
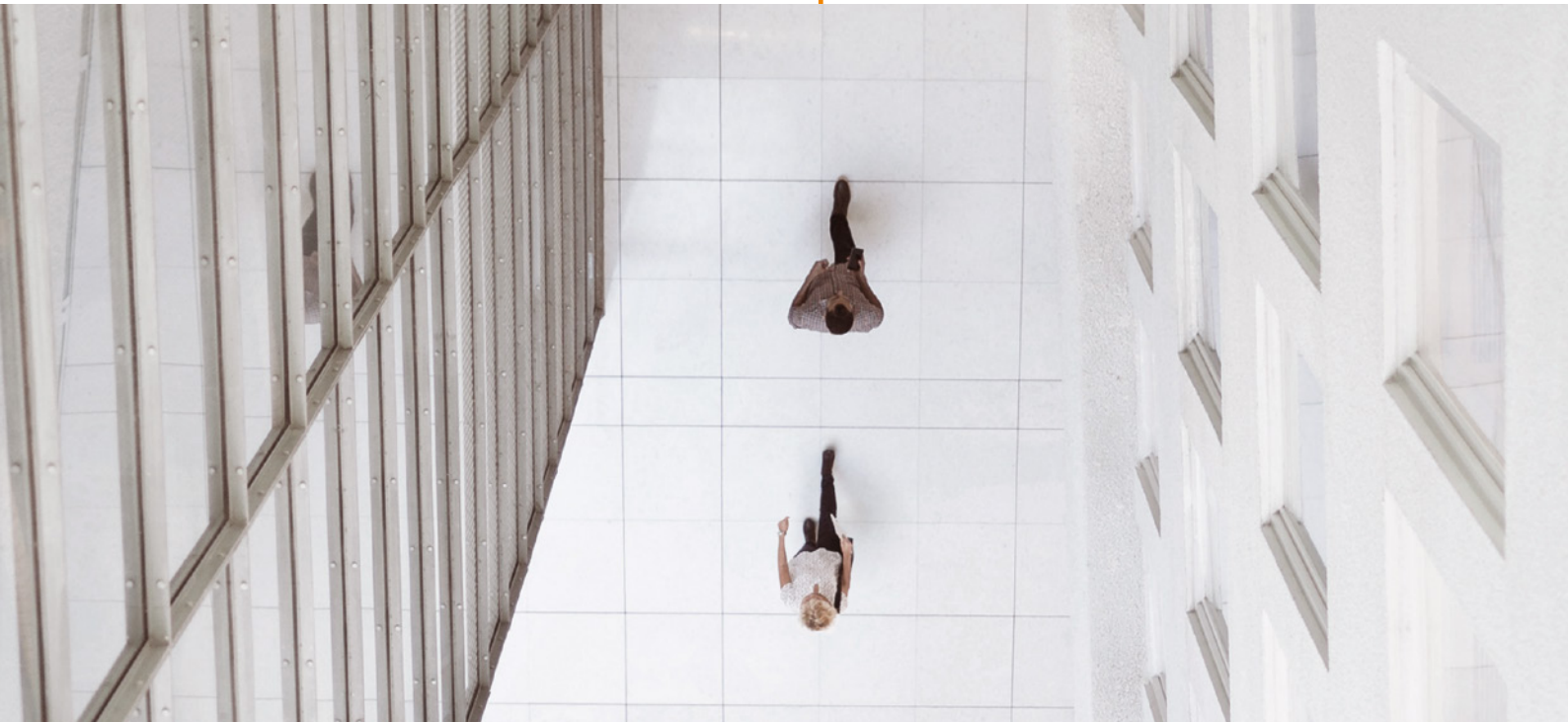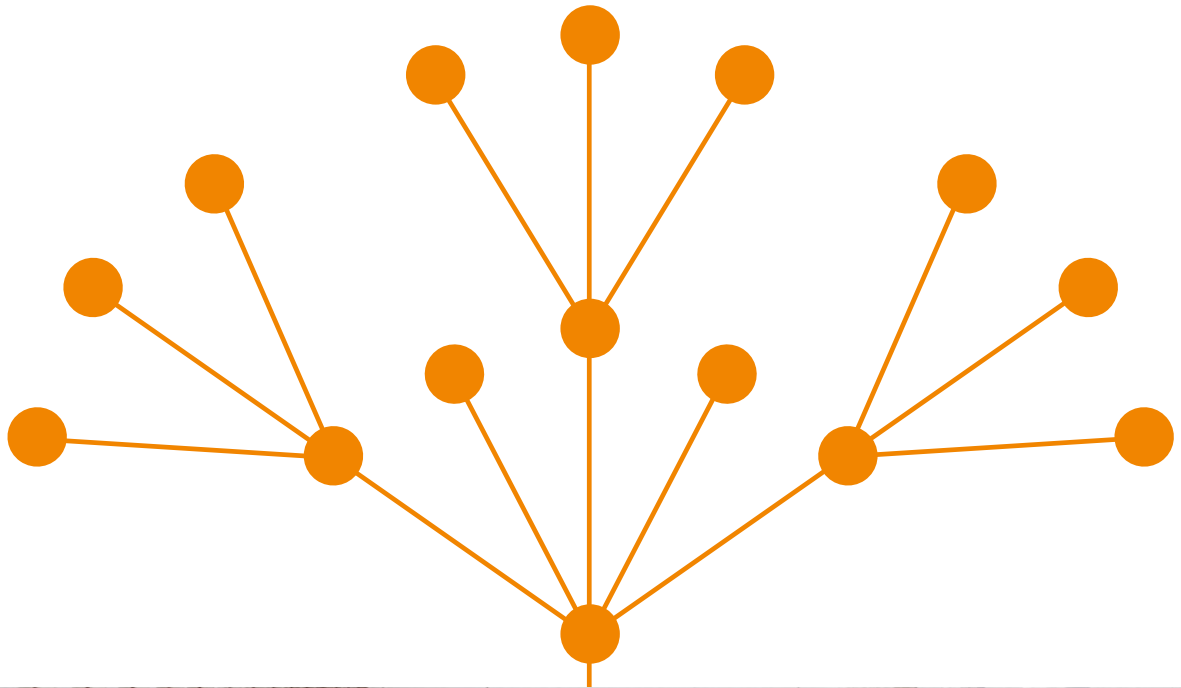
▶ INDUSTRY INTERVIEW

People power

Introhive's Alan Mercer, business development director, and Ben Roles, senior solutions manager EMEA, say an expanding law firm should consider automating management of key relationship data to maintain the personal touch in client service

One objective for any business as it grows successfully is ensuring that the customer relationships and loyalty which underpin profitability also expand. But the big challenge is that they need to grow both stronger and deeper as they do so, and certainly not weaker.

And currently, some macroeconomic and demographic forces really threaten those firms that can't effectively monitor and nurture those relationships through their growth and change.

Ben Roles, senior solutions manager at Introhive, says: "The further shifting of global economic power toward places such as China and Africa represents a huge opportunity for professional services in Europe to tap into these markets. There's a finite amount of work locally, so many firms feel the pressure to work more globally." But that will mean different cultures and working environments to navigate – and of course, more than a few new relationships to nurture.

And even in the likes of London, working culture is changing with the rise of initiatives such as more agile-working options. Alan Mercer, Introhive's business development director, says: "Previously, firms have always had their own teams of key people seated together in the same work spaces, readily available to communicate and update one another about changes in client relationships. Now they're more dispersed, that has become rather more complicated."

It is, of course, an opportunity for technology to step in and facilitate the process – and not only with new modes of communication, but potentially also some elements of automation.

Journey time

As firms grow, and introduce ever more business-development activities into the mix to grow even more effectively, client "touchpoints" clearly multiply, says Roles. But firms desperately need to maintain an overall handle on the fullness of each relationship to respond in good time to any changes that threaten it. That could be the lateral

hire of talent away from your firm, but equally might involve a development at the client that requires some especially proactive advice. "You need to have total awareness to be an effective, trusted adviser," Roles explains. "So, that means that either you need to have the superhuman strength of complete due diligence on each and every employee interaction, or you turn to technology for some help."

And both law firms' agile-working fee earners and their clients demand the convenience of knowing the current state of a particular transaction, at any point in time and wherever they happen to be at that time. This is partly informed by the 'Amazon experience', says Roles – tracking something you've bought, from store to door. Demand for this level of transparency into customer journeys will increasingly penetrate other walks of life, including professional services. "Automation can help by bringing the right data from all the firm/client touchpoints together, and make it available to somebody at exactly the right

time," he continues.

It's inevitable that there will be an important role for artificial intelligence in collating and classifying relationship data, the pair agree – but this is yet to become quite clear. "While we can see practical use cases and genuine benefits already, people still seem to be trying to find the 'big win' in terms of the value AI will bring," says Roles. However, what they certainly don't want to transpire is for the really bright idea to arrive in a flash, but they lack the richness of historic data to feed the algorithm and begin to benefit.

Mercer adds: "The big data journey starts with lots of smaller data. Whatever they'll be doing with it in future, firms need to be in the process of collecting, storing and managing it now."

Picture perfection

This brings us back to those touchpoints. It's the data from communications (phone calls, emails, meetings, portals, and so on) – plus plenty more that's stored in other potentially siloed systems – that firms need to mine to update their customer profiles reliably over time. But a tool such as Introhive can then also scour external data sources that may not have been touched – for example, websites and social media feeds – to colour in the pictures with even more detail.

"A client's corporate Twitter account will surface press releases and other news mentions, but could also help you to detect a position on a topic over time," says Roles. "It helps you to build

"The big data journey starts with lots of smaller data. Whatever they'll be doing with it in future, firms need to be in the process of collecting, storing and managing it now."

up the bigger picture, and perhaps also to understand your client's strategy. You could even begin to modify services to better meet their needs in future."

And client relationship insights can even influence a firm's internal strategy in areas such as performance management. "At a large global client, it can be hard to achieve an understanding of the true number of people who've formed relationships with people at the law firm – and more specifically, the seniority and influences within those relationships," says Mercer. "Connections are often more 'bow tie' shaped than law firms would ideally like, and they could design metrics and key performance indicators that help

to expand the relationship into more parts of the firm. The data drives that strategy."

In the most extreme circumstances, he says, leveraging some of the less obvious relationships at work has even been the difference between keeping and losing a key client – and as a result, hundreds of thousands of pounds a year.

Tech in charge

But automation also has a role to play right at the very beginning of the process of building relationship capital. "The reality is that client relationship management is too dependent on humans changing the way they work when they perceive very little value in doing so," Roles

"Inputting data just doesn't sit naturally in people's workflow – they need to interrupt a task to do it – and they don't see it as their job because they aren't rewarded for it. Therefore, it doesn't happen."

explains. "Inputting data just doesn't sit naturally in people's workflow – they need to interrupt a task to do it – and they don't see it as their job because they aren't rewarded for it. Therefore, it doesn't happen.

"Some organisations have tried to change that – for example, only paying expenses once data has been entered – but then people typically rely on the bare minimum to comply. There's rarely a reward mechanism."

Introhive works to circumvent this by automatically pulling in data from calls, emails and other repositories. Crucially, no human needs to act. "Even if all contacts were correctly stored, nobody would remember to log every appointment they have," says Roles. Automation makes up for human error and nature.

Even if they did, the manual process would take them around 5.5 hours each week – hardly the best use of time when productivity growth in the midst of a 'spare capacity' problem is such a persistent challenge for the legal sector.

"The cost of manual entry is a two-fold hit. You're paying people a salary to be part-time administrators, and it's for something that isn't billable. And that's before you factor in any lost return on CRM investment."

However, it's over time that the value of this automated data capturing really accrues, explains Mercer. So, Introhive also automatically

measures the frequency and recency of relationship markers – tracking individual and firm-wide changes over time – and crucially, surfaces this insight to employees at the time they're most needed.

"One thing the data won't do by itself is have a better conversation with your clients," says Mercer. "But the system can package up useful information and deliver it to lawyers on demand or at the most appropriate time, when they're about to meet or email a contact, for example. Points of relationship history and insight into who else knows the client are offered up when they're most relevant, and if an organisation has KPIs or key business drivers around time and billing or new revenue opportunities, that data can be surfaced as well."

And of course, the same on-demand access might be involved in preparing for a sudden meeting or pitch, or spotting a networking opportunity.

A more recent release from Introhive – Boardhive – now also maps board-member overlaps with different organisations. "The obvious next step would then be to start automating the recommendation of specific BD actions based on relationship data," says Roles. "Who within the firm is building strong relationships or winning new work? And what are they doing differently that makes them so successful?"

One thing firms shouldn't worry about too much when introducing innovative automation technology is change management, say the pair. "You can have your burning platform champions, a change coalition, and so on, but technology today is rightly changing the rules of change management," concludes Mercer. "You need process and behaviour change to become more efficient, but a good piece of technology that 'just works', once introduced, can actually push the necessary changes along."

Timely automation

David Aird, IT director at DAC Beachcroft, says automating time capture, client collaboration workflows and compliance using the Intapp professional services platform is helping the firm to deliver on its digital transformation strategy

D AC Beachcroft embarked on an agile-working strategy back in 2015, coinciding with a move into new office space in Leeds. Sitting at the same desk every day was out, and a 'clear-desk policy' was in (people can no longer leave things on them at the end of the day). Alongside flexible working, a drive toward digitisation introduced significant savings in space and paper, as well as improved productivity.

But of course, having fewer desks in the office than people depends on knowing a certain number will be hard at work from home, or on the move, each day – and while that may be great for employees in search of a better work-life balance, the transition is not without its challenges.

One of these is ensuring that people have remote access to all the information and systems they need to perform effectively from any location. And a basic administrative responsibility of

lawyers is to record their time spent on client projects, whether that's in the office, at home, or anywhere in between.

Time to go

In November 2017, DAC Beachcroft decided to implement Intapp Time, a leading time management system, to ensure all its lawyers' time was accounted for as efficiently as possible. In short, it means that work can be logged swiftly from a mobile device, after which that information is automatically fed into the necessary firm management systems for ongoing analysis of – for example – performance metrics and profitability.

IT director David Aird explains: "The time-capture benefit of this project is coming through particularly strongly. As a law firm partner today you're often here, there and everywhere – off to a client meeting, then in a taxi to something else – and at the end of the day it can be difficult to recall

For more information, visit:
www.intapp.com

exactly what you were doing when, whether that's back in the office or on the train home." And of course, human nature is such that some people will simply postpone or forget their duty, in breach of time-keeping compliance.

With Intapp Time on the case, there is no need to wait. "It automatically searches through your diary appointments and emails to surface suggestions for your time, which is obviously much easier than doing it yourself," says Aird. "On top of that, you're doing something useful with what might otherwise be 'dead time'.

Moreover, another efficiency gain is ensuring that all minutes – office-based or mobile – are recorded not only fully, but entirely correctly – the first time. "Coming with pre-programmed codes and narratives, it's simpler for fee earners to ensure they use the standard ones that some clients now specifically request," says Aird. "That helps you to avoid time being wasted in situations such as clients challenging bills, because you've recorded something in a slightly differently way." Or in a worst-case scenario, where the result is a waste of both time and money because you're beaten down to agree an unprofitable write-off.

Aird is currently only halfway through his roll-out, but says it will eventually cover all 21 locations, in the UK and internationally. It could be somewhat complicated by the different demands of the firm's many practice areas – lots of volumes and values to consider – but he says the system has already proven both flexible for this and user-friendly, as well as popular with the lawyers, who must of course be encouraged to adopt it as a standard way of working. It must 'become automatic', if you like. "It's a straightforward application, intuitive up to a point – a couple of hours of training isn't a lot in my book – and most people certainly seem to enjoy using it," he says. "In future, using AI with Intapp Time, we'll be able to enhance the accuracy of the narratives suggested by time capture, so the process becomes even more automatic."

Go with Flow?

This wasn't the firm's first automation experience with the Intapp platform – which now stretches right across the client lifecycle, from onboarding to continuous risk management and compliance monitoring, and maximising chances of cross-selling clients to improve future profitability. By automating key processes and surfacing the right

> **"All instructions are injected directly into our matter management system and finance systems, so there's no need to rely on email when handling claims."**

internal intelligence at the right time, DAC Beachcroft is better positioned for client success.

A particularly innovative automation project at DAC Beachcroft has involved the sharing of information with key clients, for convenience of both parties. A few years ago, DAC Beachcroft collaborated with another panel law firm to tightly integrate the flow of information between them and one of their largest clients, Zurich Insurance. "Using Intapp Flow and Intapp Integrate, we managed to integrate many of the client's systems with ours, from matter inception to billing management. All instructions are injected directly into our matter management and finance systems, so there's no need to rely on email when handling claims," explains Aird. "Our reason for integration was that, based on our analysis, our lawyers would be duplicating an effort of about 30 minutes in processing an instruction at inception, and spending an additional 30 minutes a day on top updating our own systems and duplicating that data on a client's portals."

DAC Beachcroft now plans to continue to expand its use of Intapp's professional services platform, taking advantage of the unified approach to workflow automation, data management and pre-built integrations with other systems.

For example, he says, Intapp Flow is a highly flexible solution to have under your belt. Intapp Flow can potentially provide templates for automating the workflows that drive everything from HR procedures (joiners, leavers, recruitment, and so on), to finance tasks (payroll, accounts, expenses), document and records management and IT provisioning. "We're currently exploring its application here for several internal processes, such as managing cash, room booking and signing documents during different phases of projects," says Aird.

"The imagination is really the limit with this one." And with all that valuable time saved through automating time capture, perhaps he and his management colleagues will be able to devote even more minutes to identifying more enticing automation options in future. ◤

▶ INDUSTRY CASE STUDY

Transforming transactions

Charlotte Ballard, knowledge operations manager at Penningtons Manches, gives her top tips for making the most of an investment in continuous process improvement, with Contract Express from Thomson Reuters

T he merger of law firms Penningtons and Manches back in 2013 added a certain extra impetus to the business of process improvement. Inevitably, of course, mergers aim to ensure a consistent – and ideally improved – experience for clients. But they also provide an opportunity to take stock and explore potential strategic lessons.

After that high-profile merger, Penningtons Manches began its journey to driving out a new level of document-automation efficiencies by deploying Contract Express from Thomson Reuters. Knowledge operations manager Charlotte Ballard explains: "The merger brought two firms' precedent banks together, and it was important to harmonise these quickly, to provide a better overall experience, not only for clients but also for the new teams working together. The usual automation drivers of efficiency, higher quality documents and lower risk still existed, but we also needed to ensure consistency."

Over time, the knowledge team has been on a path of rapidly scaling up – starting with a team of seven, two of whom worked closely with Thomson Reuters on the firm's first document automation project, to 17 and counting today.

But Ballard says lesson number one is not to focus a strategic decision like this solely on the individual documents. Instead, invest in considering how matters can be made more efficient overall. "Saving time was a huge driver, but it wasn't just a case of deciding which documents were best to automate based on time savings. We wanted to look to the future, to take apart the steps needed to complete a transaction and identify those that could be removed to make the whole process more efficient."

All-in agreement

The pilot began with the firm's real-estate work – creating the potential for suites of leases – and later on, non-disclosure agreements.

And it started with great success, says Ballard – a lesson learned being her second top tip in the field, namely to "find the quickest wins first, rather than focus on the largest amount of time saved." This approach helps with the all-important buy-in from across the business, she says.

"People often mention applying automation to the share purchase agreement as the really big opportunity – which is true, and we're now testing it ourselves – but it's also quite time-consuming to

For more information, visit:
www.legal-solutions.co.uk/
contractexpress

enact. I think starting smaller can be more effective, as people are more likely to be engaged. You need to consider the balance of the subject matter expert's investment of time in the automation design process and the output they receive. The longer the project is ongoing without producing something, the sooner you risk interest dying down."

"It's also useful to realise that you don't need to automate 95%. Around 70% or 80% can be good enough and still give you a valuable return on investment. It will possibly achieve greater traction, as there can be an inherent resistance to using something that appears to decrease the use of people's specialist knowledge too much."

Fortunately, Ballard has also recently been able to provide the board with a tangible return on their investment. "Every three months I present the usage stats and calculated ROI. For example, we recently saw a time saving of 112 hours across 124 fee-earning documents based upon a conservative average of 20 minutes saved per document – in some cases it can be an hour," she says. "Multiply the hourly rate across those figures and the numbers speak for themselves."

But it's about "the qualitative as well as the quantitative," she continues. There is, of course, the matter of what the fee earners might now be able to do with their time savings that adds more value to the business. "At the start of each new project we complete the project specification form to gather information and assess ROI on a project at the outset – then use it to check back in with the end user and share with the stakeholders. We ensure it includes qualitative user feedback.

"Our knowledge lawyers now draft precedents with the potential to automate in mind – but my absolute top lesson is to have a fully agreed, finished precedent in place first. For a firm with multiple offices, it can be a lot of work to get to that point as things change, including the law! But you have to try to future-proof for uptake to be high – it's critical that partners, the risk team, and so on, are all happy and agreed on the content."

Back to Penningtons specifically, the next phase is to make the case for automating some employment contracts – and in summer 2018, she expects to launch a suite of probate letters.

She explains: "People often think of automation

as being for very corporate documents. But one of our divisions relates to private individuals, so we need to apply it there as well. The team has drafted over 70 potential precedents that can be used in the probate process. Now the information may only need to be entered once. If a change is needed the risk is reduced through automation. There's greater control, plus it's more efficient to have everything stored in the same place.

"We always have an eye to the future and where this could lead in terms of client interaction further down the line. Contract Express is the market leader in document automation – our clients know we use it. Clients expect us to show we're using technology where appropriate to save time and improve service. They can be reassured we're driving efficiency, and that they should see the results of that reflected in the service."

Next on the roadmap, she says, is to explore opportunities for greater client collaboration, and potentially self-service, with automation – most likely beginning with the private client team.

Gold times

Ultimately, the choice of Contract Express as an automating tool was a very easy one for her colleagues who initiated the automation drive at PM, says Ballard. They were already familiar with its benefits from their time at another firm, as she was herself. "Thomson Reuters is also very flexible – they gave us several options for licensing, supported our pilot with great interaction and authoring our initial draft," she says.

"The partnership has always been great, and there's a really collaborative element in the product development. There has clearly been a huge amount of investment in pushing the product further; they take things we report back on board, and come back with solutions to our challenges."

She also singles out the team of customer success managers and the annual Contract Express user forum (which the firm recently hosted) as especially useful parts of the overall learning package – the latter described as "gold dust, the go-to event of the year."

Automation and process improvement is a continuous journey for Penningtons Manches, so it makes sense to have the right fellow travellers by and on your side.
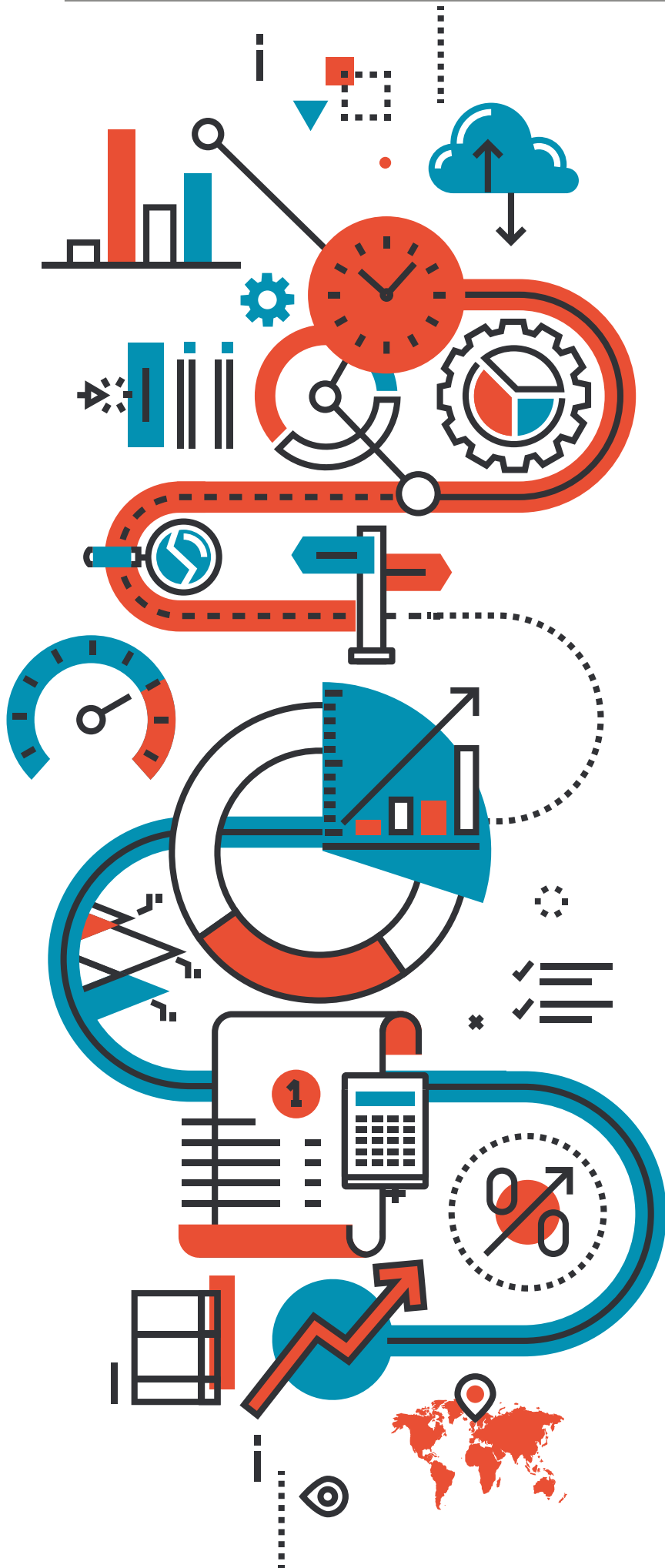
◣ **INDUSTRY ANALYSIS**

It's embed time

Peter Wallqvist, vice president of strategy at iManage, says maximise the full value of your data with an embedded AI strategy

L awyers have long been known to keep around-the-clock hours, managing tedious tasks such as digging through piles and piles of documents, but as we see the job market tightening this year, it is becoming more important than ever for law firms to reduce the risk of burnout and ensure employees are engaged in stimulating, fulfilling work.

Artificial intelligence (AI) technologies are directly addressing this need by automating some routine cognitive tasks – software-based robots that can classify or extract terms from thousands of documents, freeing up lawyers to work on more fulfilling client work. And rest assured, lawyers' jobs are secure for now. I can promise you that AI will not be cross-examining or arguing cases any time in the near future.

AI is also hand delivering the opportunity to rethink legal service offerings through automation – services that would have been impossible previously due to the disproportionate cost in terms of both time and spend. Automation can dramatically increase efficiency, reduce risk, and deliver valuable insights – benefits that enable legal professionals to deliver better business outcomes for their clients who demand and expect

fast and accurate legal advice.

This really is a welcome time of growth, opportunity and promise for modern legal professionals. And now is the time to act, as many have embraced AI technology, but they really haven't done much more than use it as a point solution so far. It's not being used to its full potential – as it isn't embedded in the organisation.

Busy lawyers should be taking advantage of full AI functionality, exploiting it to its full potential, gaining more competitive advantages than just cost competitiveness, while they remain focused on high-value, analytical elements for their clients such as interpreting the output and analysing legal documents, identifying information which is privileged or subject to compliance, and automating document classification for easier search and governance.

Twist of automate

Just one example to share is Keoghs, which went from simple automation to a fully embedded AI solution to streamline business and deliver value to its clients.

The firm recognised the potential of AI to help automate its processes and streamline the 100,000 claims it handles per year. It needed true machine learning to make the end-user experience seamlessly comparable with a human interaction.

Now, when it receives unstructured documents like claim forms or medical reports, it can access key pieces of information, such as claimant name,

"There are entire segments of claims that can be processed in an automated end-to-end fashion now, with no need for the human touch."

iManage Extract key benefits:

- **Transform project economics.** Save 50% or more in manual labour cost by automating data extraction from large document and data sets.
- **Save time.** Build solutions faster, streamline review processes and complete projects in less time, with out-of-the-box and self-trained extractors and reuse of previous models across multiple projects.
- **Find relevant information faster.** Accurately reveal relevant information from large document sets and improve overall user productivity by filtering search results based on metadata.
- **Improve review accuracy.** Eliminate human errors caused by inconsistent decisions applied by different personnel.
- **Implement large projects without sacrificing security.** Ensure that only relevant team members have access to critical project information with a user-based security mode.

defendant name and date of medical examination, and turn it into structured data that can be pushed into the firm's automated case management system.

There are entire segments of claims that can be processed in an automated end-to-end fashion now, with no need for the human touch – but the human element still remains central to the process as it's human knowledge and experience being leveraged. The legal team ultimately teaches the system 'how to think'. They continuously refine it to make it even smarter. That's a key reason it's embraced and trusted by the legal users.

AI is one of the hottest topics of conversation as I visit clients and colleagues, and with good reason. AI impacts our lives practically every day as we are living in an era where productivity requires information to be readily accessible and available at all times. Law firms around the world can be harnessing the full power of advanced analytics to gain competitive advantages that go much further than immediate cost – improving efficiency, minimising human error and mitigating key risks. ◣

introhive

RELATIONSHIP INTELLIGENCE AUTOMATION FOR LAW FIRMS

Make your law firm's investment in CRM work for you with data automation and relationship intelligence.

- Understand and leverage relationships
- Improve collaboration, knowledge sharing and lead generation
- Enhance CRM user adoption, engagement and data quality
- Automate data entry and relationship mapping in CRM