# TIPS FOR
# Automating Your Practice

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**Automation:** the technique, method, or system of operating or controlling a process by highly automatic means, as by electronic devices, reducing human intervention to a minimum.

What does automation mean as applied to your law practice? Your practice involves multiple processes, from client intake, document generation, communications, and more. Automating these processes with technology has the potential to improve office efficiencies, reduce mistakes, thus making you more productive, and ultimately helping you serve more clients, better, and improving your bottom line. No matter what your practice, automation can provide a benefit.

What can you do with automation? Sky is the limit. Almost any aspect of your law practice could be automated, but what you choose to automate may depend upon your particular practice and the way in which you conduct business. For example, say you are a divorce attorney known for your very personalized client experience, thus requiring individual interactions and sometimes hand-holding with each of your clients.
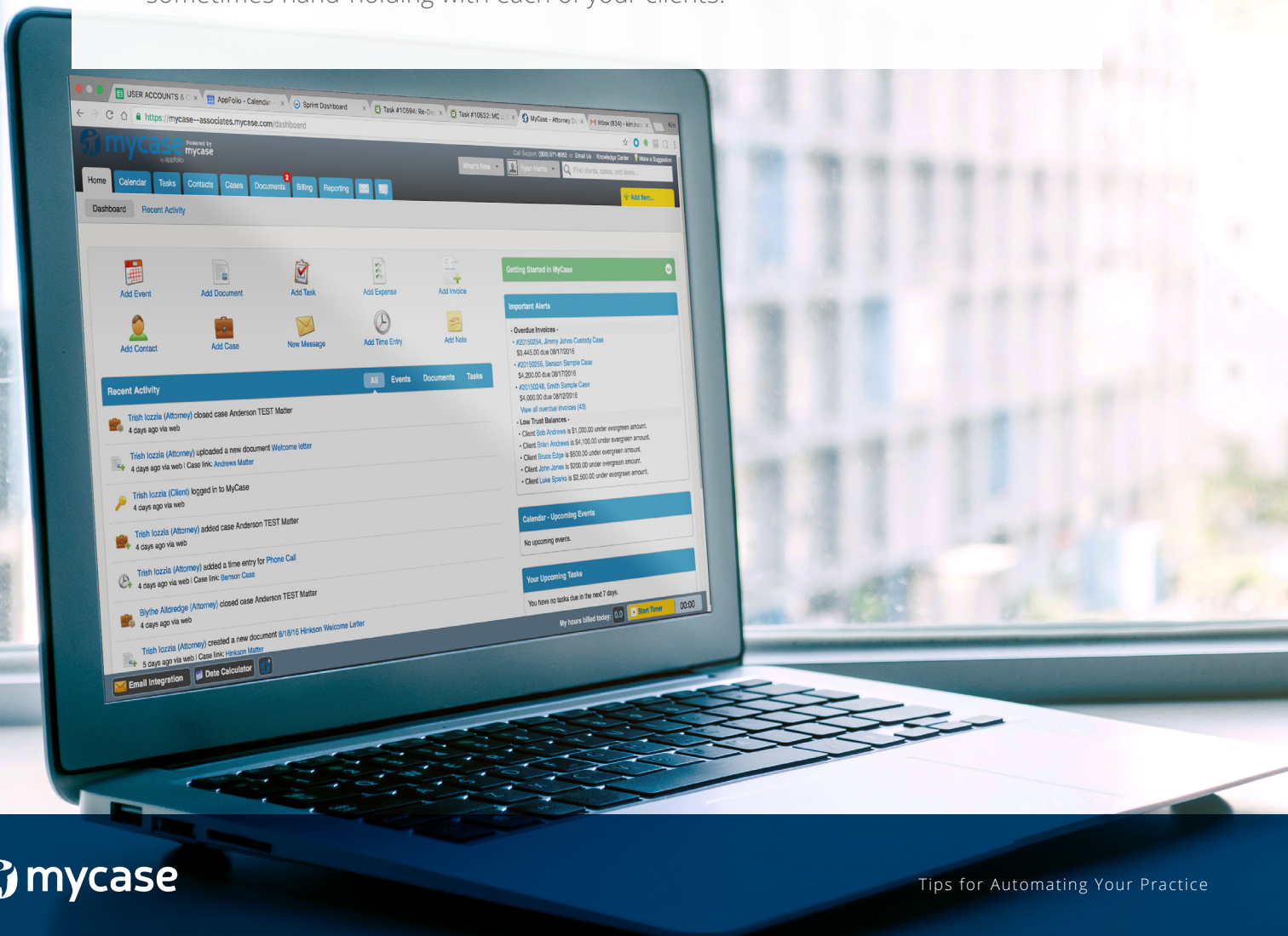
Does it make sense to automate your client communication, forcing someone to communicate solely through a client portal or other electronic means? Probably not; they need a friendly voice on the end of the line to listen. But, can you automate other aspects of your processes, such as using a smart form tool to gather necessary information from the client before a consultation, and then import it into your case management system? Yes, of course. On the other hand, say you are a corporate attorney who specializes in counseling startup companies. Automating communication with founders through a client portal that removes frequent communications from email and into organized streams of communication regarding formation, human resources, contracts, etc. may be ideal for your client's needs and culture.

This chapter will delve into the most popular automation tools and workflows. As described above, not every process will make sense for every practice. You must decide what fits your particular practice.

## The following areas of practice management are ripe for automation:

- Documents
- Scheduling
- Intake and Engagement
- Tasks and Workflows
- Communication
- Marketing

# Documents

Document automation probably makes up for the majority of automation currently used by practitioners. This is because it can become quite costly for a lawyer to spend time that could be billed elsewhere on creating, formatting, and editing documents. If you are a solo or small firm practitioner, you know that your clients want more for less; there is no room to increase billable hours for doing unnecessary work, such as document generation.

Document automation comes in many different parts from very simple to complex. Simple document automation might involve using tools to replicate oft-used clauses or words, while more complex automation involves setting up templates with merge fields to automatically insert client information. Here are three common practices and automated solutions to get you started.

**Simple document automation might involve using tools to replicate oft-used clauses or words.**

## A. Repetitive Text

Most attorneys spend a great deal of time drafting. When you write, you should never type the same block of text twice. For example, any time a potential client emails you, you should have a form email ready for response. You might have a variety of responses to potential clients depending upon their inquiries. If you have Microsoft Outlook, you already have a tool available to automate your responses. Next time you respond to a potential client email, type your response, highlight the text and save it to Quickparts. Then, when you want to use that response again, open a new message and click on the Quickpart. You've just saved five minutes in your day, and that's only based on one email; imagine if you did this with multiple email responses. Quickparts also works with Microsoft Word.

There are numerous additional products that can help you save time when writing, including a popular tool called TextExpander. This tool removes the step of having to click to insert text (with Quickparts) by instead using keyboard shortcuts. It even tracks how much time you've saved by using the tool.

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## B. Form Creation and Assembly

Beyond basic drafting, document generation makes up a huge part of most law practices. Hopefully, you've already started to build a document database for your practice - documents that you use repeatedly. These might include letters to opposing counsel, intake forms, contracts, estate planning documents, and much more. To automate document generation, first, you need to take those documents and turn them into forms. That's important not only to be more efficient but also to preserve client confidentiality - it's easy to reuse a document and forget to remove your previous client's information. You'll then need a central repository to save those forms as well as additional clauses to tailor documents to individual clients. After you've established your forms library, you'll need a method to insert client/contact information into individual documents. This is called document assembly and it's become easier with the advent of products that do just that.

MyCase gives you the ability to create and upload templates and then use its merge fields to insert client and contact information. Other document form and assembly products include TheFormTool, DraftOnce, HotDocs, Pathagoras, DocMoto, and more.

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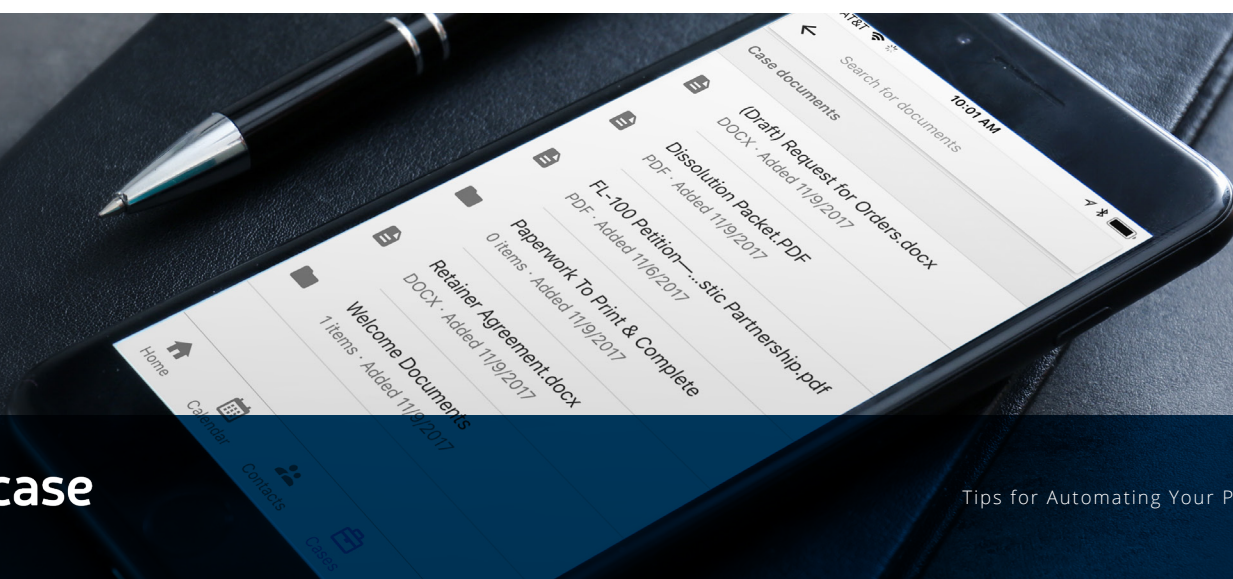
## C. Filing

Organizing your electronic documents can be a time consuming endeavor. Automation can make it easier. A tool such as TextExpander (discussed above) can be used to ensure proper document naming conventions by setting up a shortcut, for example, to name a document with the date first and prompt to enter a description (i.e. 2018 01 01 [Ltr to Client]). Other tools, such as Hazel or Automator (for Mac) or File Juggler (for Windows), allows configuration of rules that can automate document management. For example, you could set up a rule to automatically to move files once downloaded to a new location and then delete from the original downloads folder. A tool such as Hazel for Mac goes even a step further by automatically renaming and moving documents by identifying keywords within it.

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# Scheduling

Think about how many times you've participated in never-ending email correspondence between multiple parties trying to schedule one convenient meeting date and time. If you are not already using Doodle or TimeBridge for these situations, you should start now. These services allow you to input (and, in some cases, sync with your calendar) times when you are available and then create a poll for other parties to input their availability, thus resulting in one winning date. Now, how about scheduling with clients? Try using tools such as Calendly, ScheduleOnce, or Microsoft Bookings, which allow the client to book an appointment with you electronically. By syncing these services to your calendar and embedding them in your website, you (or your staff) don't have to do any work. Your client books the appointment, receives an auto-confirmation, the appointment is automatically added to your calendar, and the client receives a reminder email sometime before the appointment.

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# Intake and Engagement

In sales, converting a prospect to a client is emphasized as an essential aspect of the business. Lawyers don't think in terms of "sales" and "conversion", but they should. If you can't make a sale, then your business fails. So, how do you make effective sales? By making it easy and painless for the prospective client. Take Amazon, for example, a business conglomerate that has mastered the sales process. With one or two clicks of a button, you can purchase a product and have it delivered to your doorstep within hours. Amazon even now provides physical "Dash Buttons" that require a mere tap to purchase a product and have it delivered. By aggregating sellers, Amazon also allows you to shop for the best price. This is precisely what consumers want: a good price and simple efficient service.
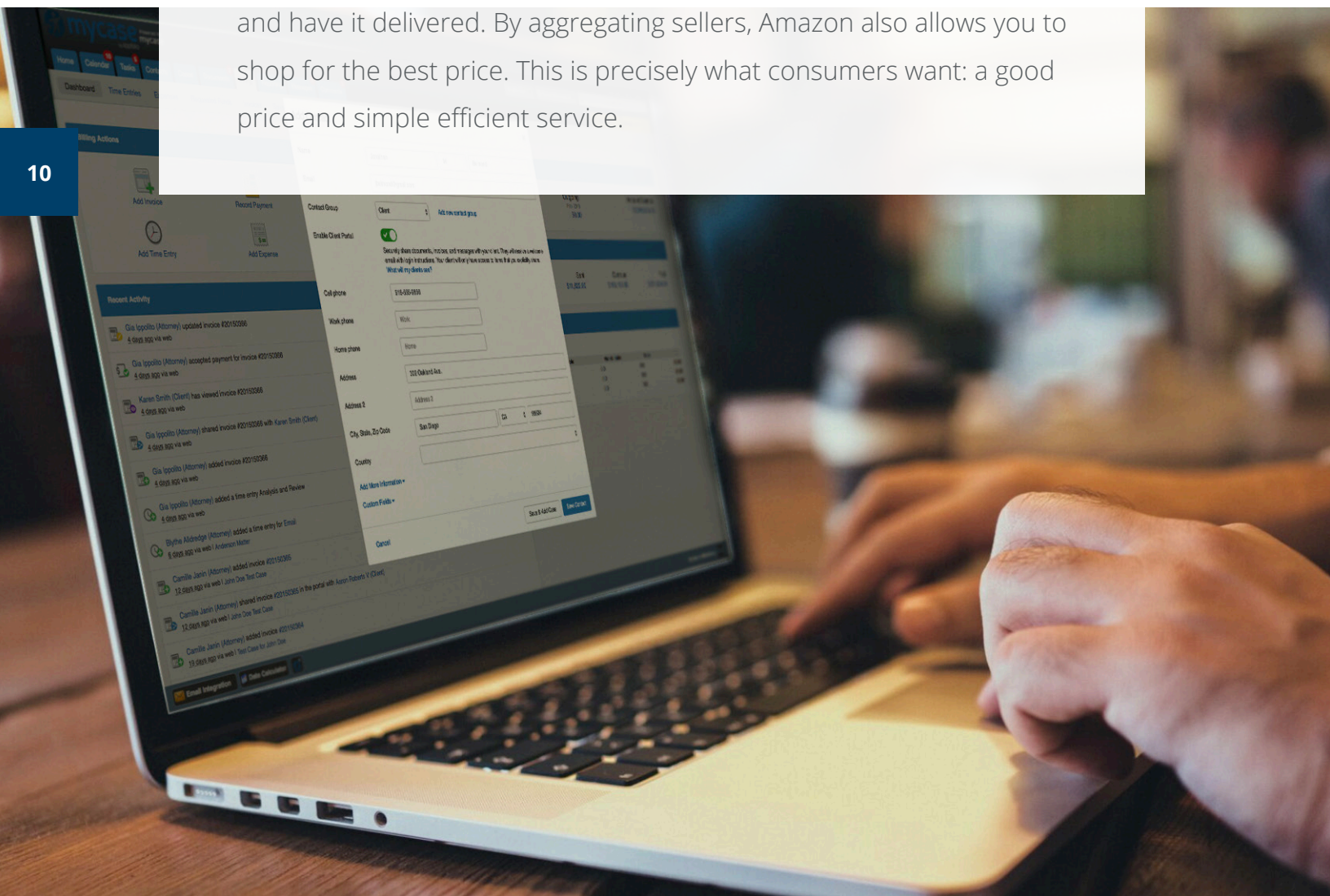
The same is true for legal consumers. Price is of course important, but so is the efficiency of the process. If a prospective client is required to jump through hoops before receiving legal services from you, they will quickly move on to another qualified attorney. However, of course, we are bound by ethical obligations and must take certain steps before engaging a client. But, this doesn't need to be an onerous process - on either side of the equation.

**Here's what an automated process might look like:**

1) Prospective client (PC) visits your website.
2) PC completes a form or system of prompts, say using a form tool such as Typeform, Wufoo, Intake123, which could even be used to screen out potential clients.
3) Form is submitted and a response is automatically sent with a link for the PC to schedule an initial consultation.
4) Intake information is input into your case management program (manually or automatically depending upon integration) and you receive a notification to conduct a conflict check.
5) Initial consultation is conducted.
6) Fee agreement is generated with information from the intake form.
7) A workflow is then assigned to the matter (i.e. a set of tasks) that prompts you to send a fee agreement, calendar deadlines, request documents, etc.

**Voila, you've automated your intake and engagement process!**

# Tasks and Workflows

Throughout the lifecycle of the matter, there will be a long list of tasks and deadlines required when handling the case. While every individual case has a unique set of facts, many times, similar types of matters have similar sets of requirements; that is, for a number of cases you might send out a fee agreement, set up an initial client meeting, have client complete a questionnaire, complete a case timeline, etc. Rather than manually write or type out this set of tasks for each new client, create a workflow that can be applied over and over. Automating these workflows will help save you time and mistakes (say, forgettingto calendar a statute of limitations). Use an electronic tool, such MyCase's workflow automation tool to pre-define a set of tasks and deadlines that apply to certain types of matter. this is great for managing tasks that require a certain due date or time after a certain task is completed (i.e. 1 day after fee agreement is signed, send out detailed PI questionnaire) because those dates are calculated for you automatically. Each time you are presented with that matter, all you need to do is select that workflow and it will then apply automatically to the new matter, creating tasks and calculating deadlines based on your workflow.

# Communication

Poor client communication nearly always makes the top of the list for the most popular bar complaints. It's important. Yet, it can be extremely time intensive. Internal office communication can also add to your load. If you are not careful, email correspondence and phone calls can literally take up your entire day. Thus, automating communication makes sense for many law practices.

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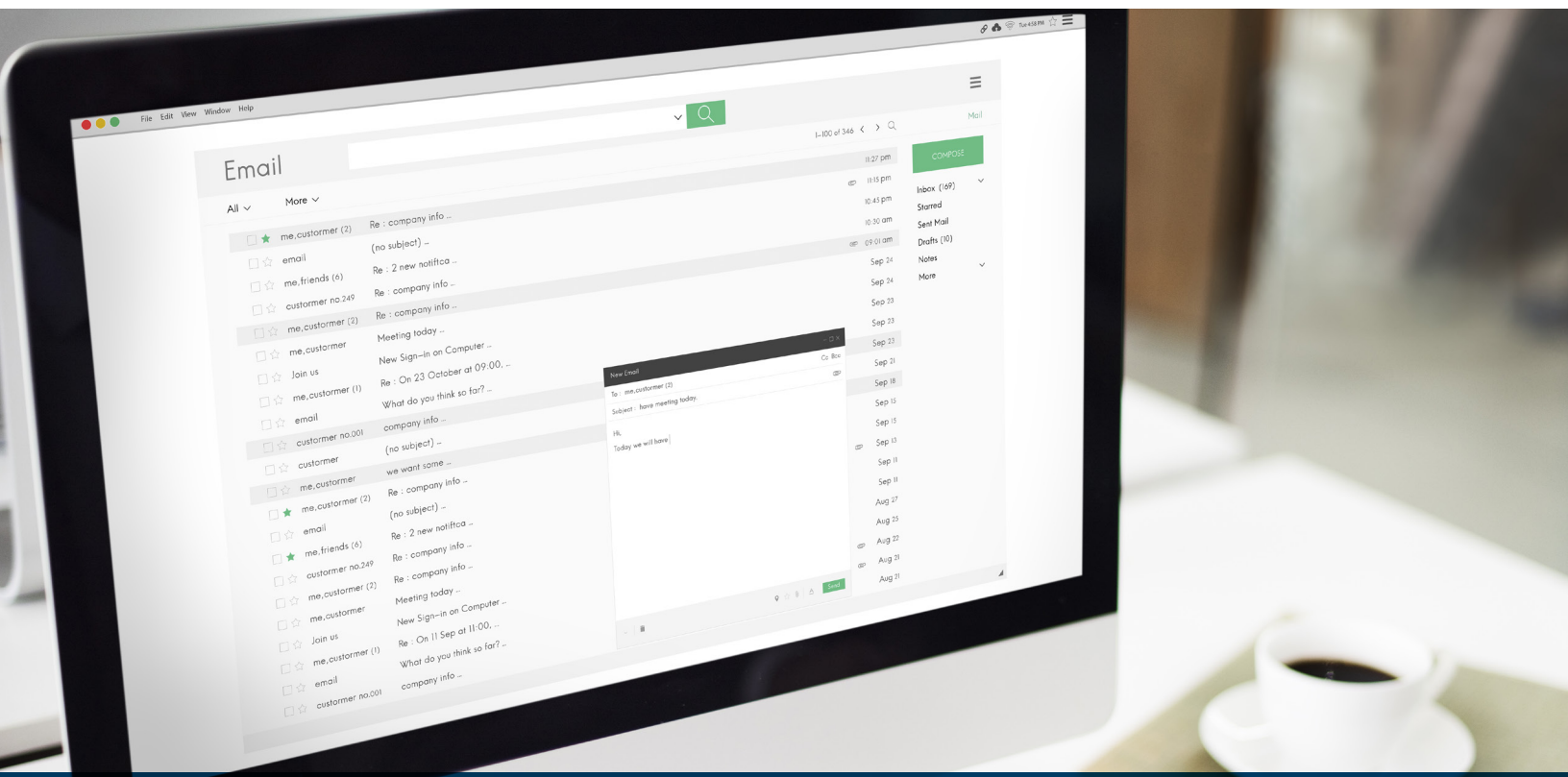
## A. Emails

We have become slaves to our email. Beyond scheduling time to review and process emails, there are some automation tricks to make it more manageable. First, use email rules to handle organization. Rules can help you to keep your inbox more manageable by sifting out clutter that isn't essential on a daily basis. For example, create a rule for enewsletters or list serves that you could view at a later date. You can do this by creating a rule to move emails received from the sender of the enewsletter immediately from the inbox to another folder or forwarded to a read latertool such as Instapaper or Pocket. As a result, you'll never see or have to process those emails in your inbox. You can also use rules can help alert you to important information. For example, use a rule for e-filing notices. Set up the rule to flag the email for importance or to pin it to the top of your inbox and copy the email to a case-specific folder.

## B. Case Status and Activity

Clients like to be "in the know" when it comes to their matters. A good rule of thumb is to not let six weeks go by without having some communication with your client. Outlook's Delay Delivery feature could be used to schedule a regular update email for a certain date in the future or could be used to send an email reminder to a client of an important upcoming date (i.e. due in court, documents needed, etc.). You can also use reminders on your calendar to schedule follow up with clients on certain dates. A client portal can also automate case activity and updates. Some client portals, such as the MyCase portal, can be configured to automatically notify the client when documents are uploaded and other activity occurs in their matter, thus reducing email correspondence and avoiding unnecessary phone calls, but at the same time ensuring a constant stream of communication with your client.

## C. Messaging

There are other tools you might also use to automate internal and external communication. For example, Slack, a messaging and collaboration tool creates channels for certain communications with certain people. This might be used with a more sophisticated client that has a number of legal needs. Rather than having to rehash the context and status of a project (for example, an employee handbook) each time you send an email, you can post to a certain Slack channel and pick up precisely where you left off. This also ensures that all relevant parties have access to project communications and updates, again thus avoiding repetitive emails. Slack is popular tool for internal communications among team members, making it easy to communicate and collaborate with multiple teams on multiple projects at the same time.

*Rules can help you to keep your inbox more manageable by sifting out clutter that isn't essential on a daily basis.*

# Marketing

Marketing, like selling, tends to fall second fiddle to everything else in your practice. Thus, if you can automate some of your marketing, you'll get it done without having to spend the time doing it. First off, if you have an online presence and use social media as a way to share and engage for marketing purposes, you need a way to manage and store content for review, reference, and sharing. Rather than subscribe and check multiple sources each day, use a source aggregator, Feedly, Netvibes, or Reeder, to automatically pull in all the sources you want to review. Source aggregators typically include features that allow you to share directly to your social media platforms.

You can also automate posting to social media using a service such as Hootsuite or Buffer, which allow you to connect multiple social media accounts to display in one central dashboard, schedule social media posts to multiple accounts, and integrate with a number of other services such as source aggregators, news aggregators, and read later services. Furthermore, you can automate dissemination of your blog posts to different channels with services such as dlvr.it, IFTTT (If This Then That), and Zapier. IFTTT and Zapier enable multiple accounts and platforms to interact with one another automatically thus allowing for even more sophisticated automated actions.

These tips lay the foundation for what is possible with automation in your law firm. Once you get started, you'll find yourself with more time, making less mistakes, and an overall more efficient practice. Soon you'll discover and create your own automated processes customized to your firm!

## BIO

Heidi S. Alexander, Esq. is the Deputy Director of Lawyers Concerned for Lawyers, where she helps manage organization operations and leads the Massachusetts Law Office Management Assistance Program (LOMAP). LOMAP provides free and confidential practice management assistance, guidance in implementing new law office technologies, and methods to attain healthy and sustainable practices. She is the author of Evernote as a Law Practice Tool and serves on the ABA's TECHSHOW Planning Board. In 2017, Heidi was appointed to the Massachusetts Supreme Judicial Court's Standing Advisory Committee on Professionalism. She can be reached via email at heidi@masslomap.org, Twitter @heidialexander, or LinkedIn www.linkedin.com/in/heidisarahalexander.