Definitive guide to automating manual legal tasks

Law is one of many sectors that are undergoing rapid evolution and digitisation. Law firms have historically faced a barrage of complex challenges, from managing highly sensitive and convoluted cases to handling intricate business legalities, not to mention the processes of conveyancing, corporate handovers, employment contracts, and everything in between.

Businesses sector-wide are _bound to experience roadblocks_ on the way to digitising their processes, but the legal space itself has always had a propensity for preferring paper and printouts over most others. There is a belief that firms are alarmingly behind when considering their digital preparedness.

For legal practices and firms, the ability to simultaneously manage and oversee the progress of multiple cases and disputes relies on using resources effectively while being a _resilient manager_. Naturally, many of the typical and expected tasks within a legal setting will consume hours of valuable time, and it's up to the firm to allocate resources to ensure optimum performance and efficiency. Experienced legal professionals _need to be positioned_ as the drivers of a law firm's success, but there are only so many tasks that they can fulfil at

any given time.

The methodical integration of technology that augments teams and liberates experts from arduous, resource-intensive, and time-consuming tasks is crucial. The advent of automation and AI-powered advancements in technology present a beacon of hope for law firms facing digitisation challenges, enabling them to streamline operations and optimise their resources.

This short guide examines how this technology can enhance a firm's productivity and efficiency.

Common factors influencing legal challenges and disputes

Any legal SME is likely experiencing a complex web of varying challenges, disputes, and cases. These will often range from straightforward employment dismissals and complaints to highly intricate business acquisitions, mergers, takeovers, or legal representation on behalf of a _serious personal injury case_.

Legal professionals will often espouse how difficult it is to give accurate timescales and estimates for completion. Several factors can contribute to the length and complexity of legal matters in any given firm, including (but not limited to):

The nature of the legal issue: Certain legal issues are inherently more complex than others, requiring legal experts to delve deeper into historical data and research extensively.

The volume of documentation and evidence: Legal cases often involve a vast amount of physical documentation and evidence, which can be overwhelming to manage and analyse without sufficient storage, systems and processes.

The number of parties involved: Complicated and sensitive legal disputes may involve multiple parties, each with their own unique interests and perspectives, adding layers of complexity, and time to the estimated resolution date.

The jurisdiction and applicable laws: Legal proceedings are governed by specific jurisdictions, bodies, and applicable laws, which can vary significantly and introduce additional complexities.

Fundamentally, legal cases require heavy manual oversight and influence, which is likely to stay the same. However, a common theme throughout is

establishing how experts can still apply their expertise while leveraging technology successfully, to the point where the most time-intensive processes are entrusted to algorithms and software.

Bridging gaps with automation

The phenomenon of automation has emerged as a scalable technological solution to bridge ever-expanding time gaps that occupy the legal space. Particularly in recent years, as AI (artificial intelligence) has exploded in popularity _despite its controversial usage_, businesses are seeking ways to ethically utilise automation tools and AI assistants to streamline workflows.

Embracing automation in the legal sector offers several advantages, to name a few:

Automation can handle repetitive and mundane tasks, such as document generation, data entry, and case scheduling, freeing up a professional's time to focus on higher-value strategic work.

Automated processes are less prone to human error, ensuring greater accuracy and consistency in legal documentation and case management.

Automation can facilitate seamless real-time communication and collaboration among legal teams, clients, and external parties, streamlining the exchange of information and expediting approvals.

Automation tools can provide centralised platforms for managing all aspects of legal cases, from initial intake to final resolution, enhancing visibility and control.

The fact remains that automation powers many innovative new tools and solutions available to companies across a broad spectrum of sectors. Whether it's first-tier customer service exchanges, _facility fulfilment_, order distribution, or content generation en masse, automation is at the heart of many time-saving incentives.

Leveraging technology for a smooth and efficient legal process

The legal sector is no stranger to technological advancements that help firms streamline operations and improve efficiency.

One notable example is _electronic document management (EDM) systems_,

which provide centralised legal document storage and management controls. Legal firms can reduce the hefty burden of paper-based filing and access documents with ease via a secure, centralised portal, with sensitive data encrypted on request.

By extension, case management software also provides a similar level of accessibility for legal firms that have a geographically dispersed workforce. As more firms embrace remote and hybrid working, cloud-based case management software provides a straightforward workaround for accessing sensitive files, as well as scheduling cases and tasks and collaborating on documents in real-time.

Artificial intelligence and _its sister technology_ – machine learning, or ML – are at the heart of many new solutions that are being spearheaded by companies looking to help legal firms overcome efficiency blockers. AI/ML as a solution is already being utilised across various legal applications, such as:

Contract reviews and digital signature collection

Document analysis and summation

Legal research across approved databases

Enhance predictive analytics

Improve decision-making

Facilitate communication among teams and stakeholders

Digitise paperwork and evidence

Recruit and onboard new talent, from paralegals to full-time sector specialists

Scheduling appointments and meetings

Generating documents and legal correspondence

Tracking case progress

E-discovery processes to obtain non-privileged case or claim information

Although leaders and governments worldwide are trying to agree on an ethical model for successful business AI use, the inherent purpose of AI/ML remains the same. Any AI-powered programme will instinctively try to recognise patterns and learn them in any given context, which is why human oversight and supervision are still crucial.

We are currently experiencing some groundbreaking stages in the development of generative AI and the availability of open-source AI tools, which suggests that the market is prime for _continued investment and growth_. Therefore, ignoring AI completely would be neglecting powerful opportunities to improve legal operations and streamline productivity across your infrastructure.

However, as with any legal case, legal firms must tread carefully. Firms that do not consider an AI tool's effectiveness in their own premises will risk deploying models that do not serve true value to them, thus, testing and refinement are pivotal. Integrating AI within a business relies heavily on choosing which areas need the most amount of augmentation and support, rather than adopting a widespread, cross-departmental model.

Legal firms will need to continually address common concerns and questions about AI and automation within their infrastructure, as the arguments about job security and cost savings _continue to run rampant_. So expecting such an integration to be met without delay or rebuttal is ambitious, at best.

It's clear to see that embracing innovative technology can empower law firms and assist them in overcoming common challenges. However, it's wise to consider the wider short- and long-term implications of their chosen method and scale of automation integration, as this will dictate how successful this inevitable move will be.

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