



Cristina Profilio **TECHNOLAWYER**

- Senior lawyer with current practising certificate
- Commercial Property Development background (10+ years)
- Knowledge Manager, Lecturer, workflow technology design specialist, digital transformation specialist
- Legal Project Manager, Lean SixSigma – Yellow Belt
- Change driver and continuous improvement advocate
- Passionate about change that enables lawyers to enjoy practising law



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Charley Orr – Legal Operations Manager ON THE GROUND EXPERIENCE

- An experienced litigation lawyer admitted in 2009 with current practicing certificate
- Experience practicing in house and within law firms
- Formerly a senior associate in ME's insurance department
- Enthusiastic about assisting legal teams reach their full potential using supportive technology and best practice
- Passionate about building a collaborative culture that facilitates inspired change



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Overview

- Define automation
- Look at automation in action
- Practical examples
- Considerations
- Where to start
- Lessons Learned
- Questions



Which one of the following best describes your current role?

Practising Lawyer General Counsel or Head of Legal Team Lawyer in a non-practising role Legal Ops professional Other

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FILE NUMBER



Automation?

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FILE NUMBER

Thinking about your experience with automation - which of the following applies to you...

I automate as much
as I can
Automation can
never apply to the
work I do

What's automation?

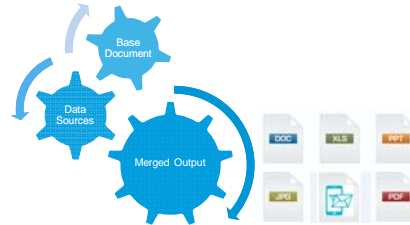
I'm just here for the
CPD point

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Document Automation

- Data entry minimisation
- Single source of truth
- Risk management
- Further development
- Time saving



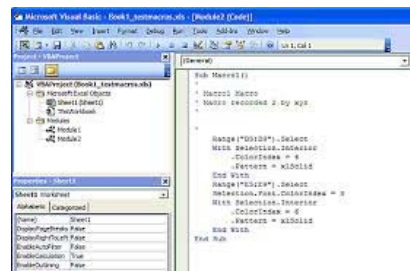
What are the benefits of Document Automation?

- Consistent, up-to-date digital documents
- Increased productivity with decreased risk

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Macro Automation

- Cost effective
- Incredibly powerful
- Takes templates one step further
- Training required
- Tech savvy lawyers to join the dots



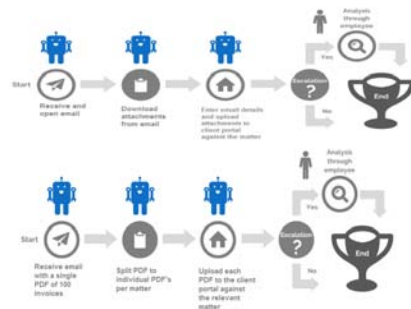
What are the benefits of Macro Automation?

- Can be a significant time saver for formatting or other 'fiddly' tasks
- Great way to ensure consistency in methods and outcomes

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Robotic Process Automation

- This is for the inner techies
- Incredibly powerful tool
- Process first
- Toolkit essential
- Deploy with caution



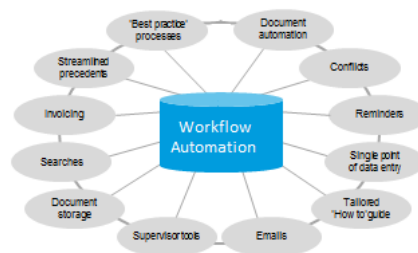
What are the benefits of RPA?

- Greater compliance
- Increased speed
- Reduced costs
- Better employee experience – more interesting and less mundane work

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Workflow Automation

- High tech solution
- Team of trained specialists
- High ROI
- High investment
- Lifecycle work
- Plethora of products



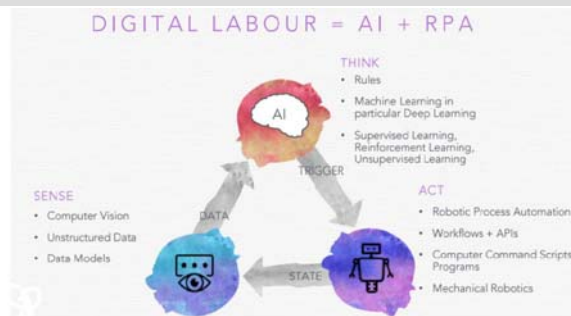
What are the benefits of Workflow auto?

- A single location to manage your matter data and file notes
- Track and adhere to deadlines
- Manage hundreds of matters concurrently and consistently

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Intelligent Automation

- Combination of one or more
- Black belt stage



What are the benefits of Intelligent auto?

- Handles processes involving variable and unstructured data inputs
- Can deliver value beyond efficiencies
- Can be iteratively self-improved

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What type of automation do you currently use?

Document Automation

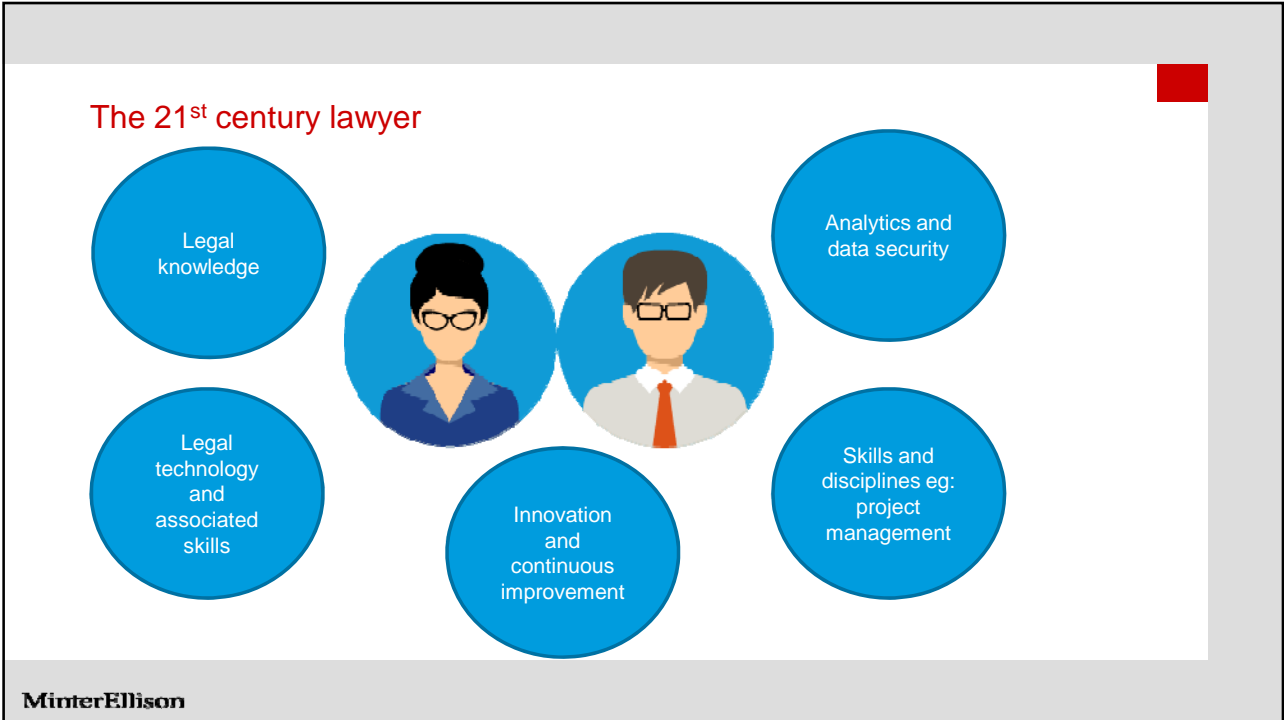
Macro Automation

Robotic Process Automation

Workflow Automation

Intelligent Automation

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Typical automation use cases

- Highly repetitive tasks that do not require judgement
 - Document filing
 - Invoice processing
 - Document uploads
- High volume tasks that follow a pattern – even with some variables
 - High volume contracts or forms
 - Correspondence production
- The management of mostly standardised process

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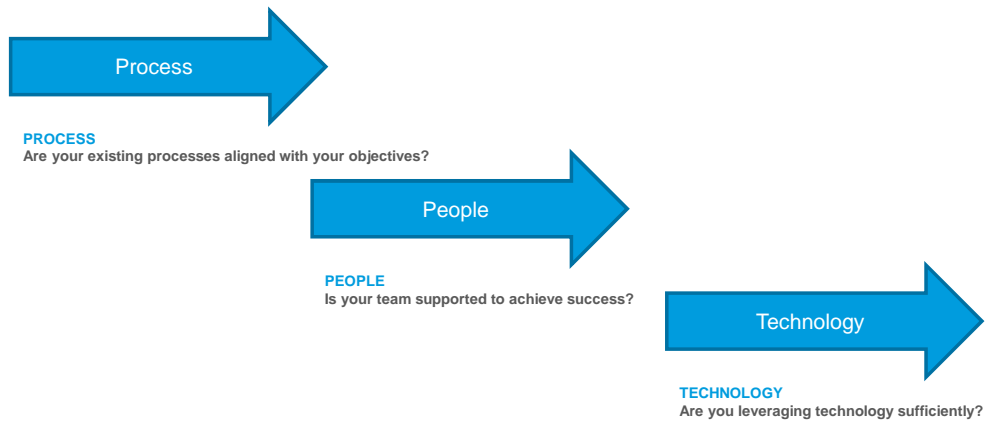


How to get started

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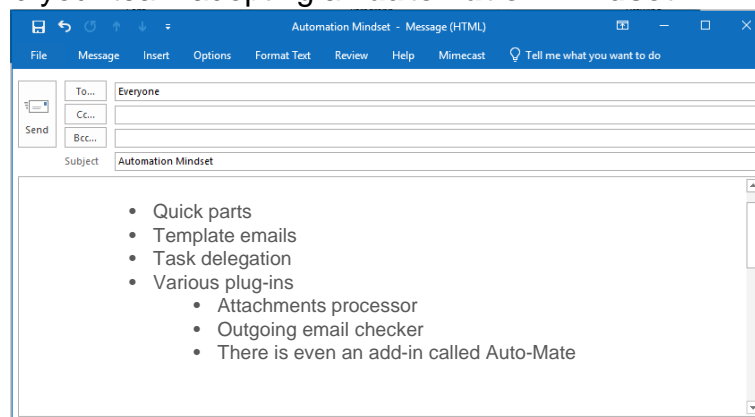
The transformation trifecta – People, Process and Technology!



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Automation Mindset

- Get yourself and your team adopting an **automation mindset**



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Keep it simple

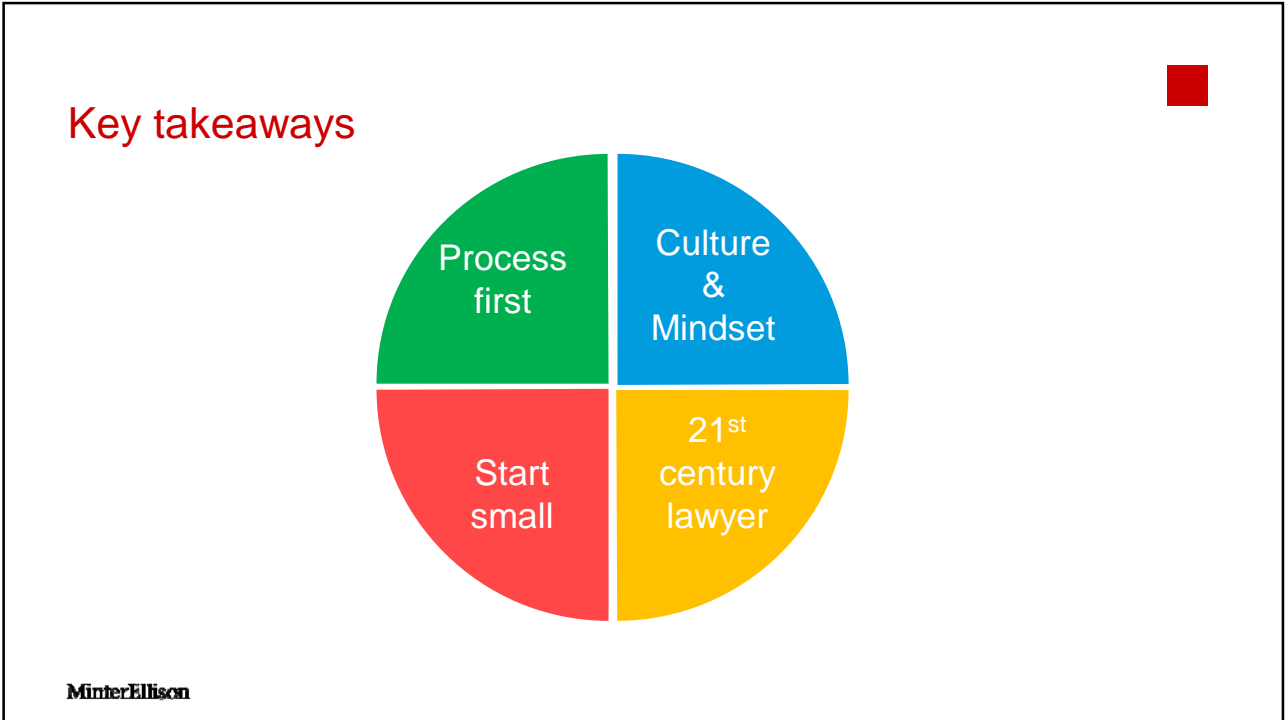


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Expand the concept – what's next?

- Building on from automating a document.
 - Areas where always a suite created
 - Isolate the repetitive work - eg: template selection, data entry
 - MVP
 - Seek change opportunities
- A Finance Case study***
- Getting to first cut of documents
 - Reduction in syntax changes
 - Most common path
 - Looked at the data in our DMS
 - Identified document package required with consistent variable set

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Questions or comments

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What did you learn today?

What is one thing
you'll **KEEP**
doing as a result
of today's session

What is one thing
you'll **START**
doing as a result
of today's session

What is one thing
you'll **STOP**
doing as a result
of today's session

Contact us

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