



Workflow on your Workspace:
become more

PRODUCTIVE AND EFFICIENT

Learn how implementing automation can
help your firm achieve greater success.



Are you using your software to its full potential?

Many law firms own legal software applications to assist them with case management, time and billing, and accounting. The question is: Are you using your software to its full potential?

Most law firms use only a portion of their software's features and integrations without realizing and maximizing the software's full capacity. The application support specialists at Legal Workspace estimate that most firms only use about 40 percent of the functionality of workflow automation or case management software.

Law firms are particularly poised to take advantage of workflow automation because many of their processes are methodical and follow a set procedure. Developing repeating workflows not only increases efficiency, but also ensures accuracy.

To figure out what can be automated, firms should define their repetitive workflows and problem areas.

Here are five guidelines to help you understand how automation can work for you:

1. Standardize and implement

Different practice areas have different processes that are methodical or repetitive. Determine which processes fall into that category, identify common issues, then streamline them to make procedures standard.

Here's an example: Most firms repeat the same process every time they take on a new client. The firm will go through an approval process, run a conflict check, and finally proceed with the client intake process. Those steps can be standardized to prevent bottlenecks and keep the process on track.



2. Checklists

Practice areas typically have sets of milestones or tasks that need to be accomplished. Two good examples of events that benefit from using a checklist are 1) when a new case is entered into the system and 2) when a case is closed.

In both scenarios, there are many small to-dos that need to be completed in a certain order. At the beginning of the relationship, firms need to set up the file and the billing, assign staff to the case, send a thank-you letter to the client, and countless other administrative tasks. When the case has closed, there's a similar laundry list of items to do, such as finalizing billing, document storage, and more.

Rather than having an individual keep track of all the small tasks—or hoping that everyone remembers their responsibilities and performs them in the correct order—a checklist makes certain that every task gets accomplished and that nothing happens twice.

3. Document generation and file sharing

The application support specialists at Legal Workspace have seen data privacy issues arise out of human error when people recycle electronic documents, using them repeatedly for the same purpose. Let's say an attorney pulls up Jane Smith's document because he needs to create the same type of document for John Jones. He searches for all of Jane's information and thinks he replaces it with John's new information in the document—but he gets interrupted mid-stream and forgets to replace Jane's social security number. Not only is this scenario inefficient, compromises sensitive data.

Increase accuracy, efficiency, and security when you standardize document templates in your firm based on practice area. Use case management or practice management apps, such as Amicus Attorney®, Practice Master®, or Time Matters®, to pull data and autofill the documents accurately. Then, share your files with the appropriate parties using a secure platform in the cloud, such as Legal Workspace.

4. Calendar Templates

This workflow feature helps attorneys track standard tasks and deadlines that need to happen on a case. For example, a personal injury attorney might construct a statute of limitations calendar template, which includes the deadline and reminders going backwards six months, 90 days, the month, and the week before the deadline hits.



Automating reminders allows attorneys to worry about the finer points of their cases, rather than the administrative details.

5. Triggers

Often in a law firm, one action leads to another action. A more advanced feature in some practice management systems allow users to set up “triggers,” which simply means that once you indicate within the system that a certain event has occurred, another action that relates to the case automatically pops up. For example, if a status of a case changes, a trigger would prompt users to take the next logical step.

Taking advantage of the features that likely already exist as part of your case management or practice management software is a simple way to increase efficiency, accuracy, and security. If you need assistance determining what you can do and how to do it, Legal Workspace’s application support specialists can help you fine tune your automation so firms can maximize their billable hours.

Legal Workspace is a pioneer in cloud-based work environments and data storage designed specifically for law firms. Learn more at legal-workspace.com.