

## ***Tips for Successful Automation Initiatives in Legal Operations: Part 1***

The need for automation in legal operations is now more essential than ever. With increasing pressure on law firms and companies to streamline processes and reduce costs, automation can help to achieve these goals. However, implementing automation initiatives can be a challenging task. This article is the first of a two-part series with tips for successful automation initiatives. The tips discussed in this article include standardizing processes, simplifying tasks, and approaching automation initiatives as a process of continuous improvement.

First, it is crucial to keep in mind that successful automation initiatives require more than just a one-time implementation. Instead, automation should be viewed as a continuous process of improvement that involves evaluating processes, workflows, and data regularly. To do this, it is best to have a dedicated person or team responsible for managing the automation initiatives and constantly looking for ways to continue to improve. This could be as simple as assigning one person in the organization to oversee an automation project or creating a team to monitor and optimize multiple automation initiatives. By doing so, you can ensure that your automation initiatives continue to meet your organization's needs and provide ongoing benefits.

Second, standardizing processes is an essential aspect of successful automation initiatives. Existing manual processes are often difficult to automate because they are performed differently by different people, which can add unnecessary complexity when developing automation for the process. By standardizing processes, it is easier to automate them. This is particularly important in law firms where different attorneys may have different processes for different clients or where different offices in the law firm may have different people with different processes for the same job. Ideally, you can get the different groups to agree on the same process for automation across the firm. However, if the groups fail to agree on a single process, then try to identify a core part of the process that is common across attorneys, clients, offices, etc. and separate it from the more customized part of the process. Automating the core part of the process not only enhances efficiency and cost-effectiveness but also facilitates a more accurate assessment of the additional resources and time required for the manual performance of the customized part of the process.

Third, when it comes to successful automation initiatives simplification is key. Automating smaller tasks before moving onto more complex processes is advisable. Rather than attempting to tackle everything at once, starting with small and simple processes and working your way up to the more complex ones is a better approach. You should take each manual process and analyze it component by component, then start automating one thing at a time. By identifying the low-hanging fruit and automating it first, you can ensure that the new automation fits well with your existing processes and that you do not bite off more than you can chew.

In conclusion, automation is becoming increasingly necessary for law firms and corporate legal departments. However, implementing automation initiatives can be challenging. It is important to keep in mind that automation requires a continuous process of improvement. To achieve successful automation initiatives, standardization, simplification, and a person or team

dedicated to ongoing automation efforts are essential. By following these tips, you will soon be leveraging the benefits of automation in your legal operations.