

centerbase.com

Centerbase CloudBased Law Firm Management & Growth Platform

Staying Ahead of the Curve: Bolstering Efficiency Through Automation

developers · Thursday, October 8th, 2020

Like many industries, the legal profession isn't immune to the rapid changes in technology. Constant developments in legal automation have made scanning documents, finding case matters, and handling client communication a whole lot more efficient – but at what cost, really? How is the legal industry rising to these new challenges in automation, and what ways can you stay ahead of the curve?

We're glad you asked. In this blog, we're going to discuss the ways legal automation tools help bolster [operational efficiency](#) in a way that benefits your firm, and doesn't add unnecessary steps or complications.

What is Legal Automation?

For context, legal automation is the process of using software to help organize and manage all tasks in a firm.

What does that mean, exactly? Things that attorneys and other firm employees used to do via a physical paper trail are now all (or mostly) accomplished digitally. Many common tasks attorneys performed twenty years ago are now automated – a whopping 23%, according to [McKinsey](#) – which has undoubtedly raised new disruption challenges throughout firms. Ensuring these legal tech systems are secure, adopted by everyone, and made for efficiency are essential. For many firms, adopting new technology while maintaining a profitable level of operations feels incredibly daunting, which is why resistance may occur.

From employees touting the age-old “I've always done it this way,” to partners feeling reluctant to invest in a technology they may not feel comfortable in, there's plenty of worries about stepping into the nascent world of automation. But when you dive in, there are double the amount of benefits to doubts if implemented correctly. Not only does it help mitigate human error, but it also

saves considerable time, which is the biggest benefit where automation is concerned. The very definition of efficiency denotes organization and orderliness – two things legal automation is primed to accomplish for you.

The above are just a few reasons as to why it's essential to choose software that ticks all the boxes on efficiency, and gets everyone onboarded in a way that rewards adoption, not rejection.

4 Ways Legal Automation Increases Efficiency

1. Custom Workflows Reduce Time Spent on Administrative Tasks

No matter what department you work for in a law firm, there are iterative tasks always needing to be done every month. Billing statements. Client reminder emails. New client paperwork. The list goes on and on. In order to reduce the time spent, workflows use Artificial Intelligence to create and recreate these scenarios through a set of actions you enter into a software system.

The nice – not to mention extra efficient – thing about practice management software is you can customize these actions to your firm's needs. That admin work of endless data entry is greatly reduced with the proper set of rules established while onboarding your software.

Whether it's generating a monthly report on case matter stats and what stage they're all in, these workflows are a huge time saver that we'll expand on more later. Or if you're very intrigued, you can check out the blog, [Everything You Need to Know About Legal Workflow Automation and Why You Should Have It](#).

The biggest takeaway here: [workflows are both customizable and easy to use](#), which yield themselves to increasing efficiency in any firm.

2. Auto Triggers and Task Automation Boosts Accuracy

We've all been there – moving too quickly between tasks, trying to check off as many things on our to-dos as possible. It's unfortunately the prime opportunity for mistakes to occur, and we all

know mistakes are costly in time and money, not to mention inefficient.

Auto triggers are a form of workflow, and fire off whenever you create or modify a record or when a given set of criteria is true (usually taking the form of a query). This lets you automatically transfer information from Centerbase into your matters, which is extra convenient if you're trying to send correspondence or follow an exact timeline for litigation. Legal automation makes everyday data entry and updates simpler than ever before.

Want to see how Centerbase does it?

Here's a use case where we assign a client email address to their matter that generates if the query is blank.

3. Reduce Time Spent Generating Documents for Clients

Templated documents for clients is a tale as old as time, but legal automation takes it one step further with merging queries and data en masse. The ability to create document templates by merging information stored in your legal software cuts down on data entry and the chance to make mistakes.



Even better – you can easily open and save client documents from Microsoft Word in Centerbase,

making it easy to work within the programs you and your employees are comfortable in. The idea of bolstering efficiency is not reinventing the wheel and having software that doesn't overcomplicate, but empowers people to work efficiently. [Integration with Microsoft and NetDocuments](#) is one of the many ways Centerbase strives to take the curve off learning something entirely new.

4. Automate Client Emails

Client reminder emails become effortless with legal automation. You can kiss goodbye the days of sticky notes and harsh dings on your calendar reminding you to send update emails. With the proper legal tech, an automatic email notification can be sent every time a case matter moves to a different stage, meaning everyone stays informed and up-to-date on the case in real-time.

Less manual project management means more time back in everyone's day to focus on staying profitable and delivering above and beyond customer service that creates rapport, referrals, and client retention.

How Automation will Change Legal Jobs

Technology is changing the legal landscape for everyone involved, and now's the time to put plans in motion for boosting efficiency. In order to adapt, great software and great people are going to be your best resources for saving time. The automation features discussed are among the few benefits that encompass legal software – there are many more. These powerful additions will help improve day-to-day processes and ensure your staff get things done faster and more effectively.

Due to this technology, everyone's jobs are going to change in ways that require more people interaction. Technology will become a bridge toward helping us interact without a computer screen being a barrier. If nothing else, it will be an invitation to ensure communication and relationships get built, and that everyone at your firm can be ready to adapt – attorneys, accountants, legal assistants, and all working together toward a common goal. It's this ideal we strive for with legal technology and software.

Still wondering how to save time and increase efficiency in the form of billable hours and extra time back in your days, weeks, and months? (That's another benefit of legal automation – you'll continue to see the time saved compared to when you didn't have it.)

Our mission is to help you serve your clients better – whatever that looks like. Every area of law and its requirements are different, after all, but the right software system adapts seamlessly to what you need. At Centerbase, our technology adapts to fit your needs, not the other way around. Feel free to [schedule a free, no-obligation demo](#) with Centerbase to see how we can boost efficiency in your everyday processes with legal automation.

This entry was posted on Thursday, October 8th, 2020 at 12:00 am and is filed under [General](#). You can follow any responses to this entry through the [Comments \(RSS\)](#) feed. Both comments and pings are currently closed.