



There are now 'intelligent' automated pdf forms that allow fee earners to populate data fields within a pdf, from which the data is then extracted and injected into your PMS

Auto onboard

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Imagine a world where adding automation to your firm could save you seven months of time per year? A bold claim you may say – but it's entirely possible and proven.

In today's legal world, alongside solving legal matters for clients, fee earners are expected to be involved in business development, accountancy, compliance, administration, and so on, all of which add to pressure on day-to-day life. As a result, little time is left to explore new innovations. So how do we break this cycle of working harder to maintain client satisfaction and still accommodate continued growth? Automation is enabling firms to work smarter, not harder.

LPM's Legal IT landscapes 2020 report highlights that firms are half as automated as they could be – which is a huge void of missed opportunity. One of the big problems that law firms face is that they don't know what automation they want or need. Perhaps the biggest pitfall is that automation seamlessly runs behind the scenes and is often forgotten and not talked about. So how can firms research and request something if they don't know it exists?

The largest part of introducing automation is identifying the areas that would benefit from it. It's important for you to highlight with your providers areas of opportunity, even the little tasks that may seem too minor to automate but would still benefit.

A big area crying out for automation is operations and admin tasks; all too often clients get the short end of the stick due to a firm's inability to handle the ever-increasing daily volume of client admin tasks. And, let's face it, everyone is under pressure to deliver more while making sure that there's no compromise on quality.

There are now 'intelligent' automated pdf forms that allow fee earners to populate data fields within a pdf, from which the data is then

extracted and injected into your practice management system automatically.

A huge range of such automated pdf forms are available for the legal industry right now. They focus on family proceedings, property, police station attendance forms and more. They allow fee earners to work offline, speed up workflows, improve data accuracy and remove the requirement for entering data multiple times.

Last year, we worked with a well-known SME law firm to create automated police inception pdf forms, improving the accuracy and completeness of data. About 35 minutes are now saved onboarding each client. The net result is an annual saving of seven months' work, which is over half a salary. This new integration is having such a big impact that the firm had to undergo a restructuring to redeploy client-onboarding staff to focus on higher value activities.

Using this automation removes the process of your client visiting your office with their ID documents. You can send them a link to a secure area of your website, which allows them to scan their utility bills and passport, alongside facial recognition to verify their identity. This is then passed back to fee earners automatically so they can proceed to the next step – vastly reducing the time for onboarding clients. Then, once the case is closed and you seek payment from the client, you can embed a payment button in your final email, which takes the client to an online payment portal – allowing them to pay their fees online, from any device, securely. All of which provides a much smoother customer journey, start to finish.

These are just a few examples of what you should consider as simple automations. They take away human error and the mismanagement of sensitive data, improve your client journey, drive additional revenue and provide that all-important competitive edge. **LPM**



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