

# LAW OFFICE AUTOMATION: WHY AND WHEN?



## NATIONAL EXPANSION

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By **Jeffrey Brochin, Esq.**

**GreenPoint**>  
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**EXECUTIVE SEARCH AND RECRUITMENT**

[william.anderson@greenpointglobal.com](mailto:william.anderson@greenpointglobal.com) | [pranav.menon@greenpointglobal.com](mailto:pranav.menon@greenpointglobal.com)  
International Corporate Center, 555 Theodore Fremd Avenue, Suite A102 Rye, NY 10580  
[www.gpesr.com](http://www.gpesr.com)

## Do you ever get the feeling that your firm is spending too much time on administrative tasks that are not billable to the client? If so, you are not alone.

According to a survey conducted by the Thomson Reuters Institute, 74% of surveyed firms reported that spending too much time on administrative tasks was a real—and increasing—challenge and that they wished they had more time for billable matters. Yet, strangely, over half of those respondents admitted that they had not yet implemented a plan to address the problem. Rather than continue with such an impractical—and unprofitable—situation, firms of all sizes would do well to investigate the automation solutions that exist to ease the administrative burden while upping the bottom line.

### Automation and Productivity

As much as humans may not want to admit it, there are some things that humans do better and some things that automated systems do better. In fact, according to experts, almost a quarter (23%) of law firm tasks can now be automated, leaving a corresponding percentage of your time doing what law firms need to do to stay in business. According to a 2019 Legal Trends Report, non-billable hours in the average law office result in a mere 2.5 hours of billable work out of an 8-hour day, meaning that lawyers, on average experience only a 31% time-utilization rate. By allocating the limited number of work hours to the actual practice matters that only the attorney can do, the non-billable administrative matters can be arranged so as not to—or to minimally—distract from billable practice hours. By preserving time for more effective use, offices run both more efficiently and profitably.

### What Can be Automated?

Different practice areas have differing emphases as to what takes up 'automatable' time. For a real estate and transactional practice, contract generation will likely predominate, whereas in a

litigation-heavy practice, paperwork related to pleading and motion practice—coupled with an extensive amount of filing time—will prevail. With today's technology, meeting with a client in order to execute documents has all but become a thing of the past, yielding to universally recognized electronic signature verification platforms.

For documents that are suited to template modification for most cases, support staff can be trained to utilize template software, which will then only require attorney review as both professional ethics and quality assurance measure. In many jurisdictions, filing is online and neither the attorney nor his higher-priced staff need to waste previous time physically filing papers at the courthouse.

### Tasks Common to All

But regardless of the practice area, two crucial items are common to all and lend themselves to at least partial automation: client intake and billing. Often it is to the advantage of both the attorney and the client for the two of them to meet in person (or at least virtually), especially when it comes to a first-time client. The attorney needs to understand the needs of the client and, the client must understand what his or her obligations are to the attorney both in terms of financial

## Executive Summary

### › The Issue

Under what circumstances should a firm consider implementing automated systems, and what are the most common and critical automation systems to introduce?

### › The Gravamen

At a minimum, an automated time and billing program is a must for all firms regardless of size, so that forgetful billing becomes a thing of the past.

### › The Path Forward

Consider which administrative tasks pose the greatest burden on workflow and disrupt the lawyer's attention to billable hour matters.

obligation as well as cooperation throughout the attorney-client engagement. However, certain practices, such as personal injury, can and do have routine client intake handled by a legal assistant who is fully versed in what to ask and what information to collect. But rather than sit with a legal pad and pen, the legal assistant inputs client intake data into a software program which not only serves as a checklist but also generates a Release form for obtaining medical records, an attorney POA, attorney-client retainer agreement, and a calendar flag for Statute of Limitations tracking. There is no longer any reason for an attorney to detract from his or her billable hours for such an administrative task.

## Forgetful Billing

The scenario is a familiar one: your client file is penned with several notations (possibly illegible) as to the dates you had telephone conferences with the client or opposing counsel or how much time you spent on your review of the third draft of a settlement agreement or other similar 'time entries'. Perhaps, they are even on scraps of paper quickly shoved into the file or on sticky notes posted here and there. Regardless, the time needed to piece all of this together in order to get a bill out to the client can be enormous and is, in all cases, a colossal waste of valuable time. It can also be a cause of undue stress for an attorney who might repeatedly hear from a spouse, 'honey, did you ever get a bill out to Jones?'

No matter what area you practice in, and even if you are a solo practitioner, automated billing is a must. Both for accurate time tracking and timely bill generating,

there is no reason not to have all of your time and billing functions automated. There is also a well-known business adage to keep in mind: 'The longer the time between the rendering of the service and receipt of the bill, the less valuable the service becomes in the mind of the client.'

## Rules-based Calendaring

Manually noting court deadlines is time-consuming and can lead to incorrect entries, missed deadlines, and the worst nightmare—a malpractice suit. Furthermore, even the most diligent lawyer or paralegal who is tasked with tracking and entering deadlines will still be subject to the risks inherent in changes in court rules. Keeping up-to-date on such changes is yet another waste of time for practitioners and their staff.

With rules-based calendaring offered by various software vendors, court rules and their revisions are seamlessly integrated into your caseload calendar. One such provider boasts a comprehensive database of over 1,800 court rules covering all 50 states. Such automation keeps the attorney and his or her staff automatically informed of changes while maintaining full compliance with them.

## Suited to Repetitive Tasks

Although not all administrative tasks can be automated, many can, and this particularly applies to ongoing daily, weekly, or monthly repetitive tasks. These tedious and redundant—yet important—administrative functions can be a burden on

## Action

### 1 Decide What to Automate:

The most repetitive non-billable tasks should be foremost on your list of what to automate after switching to an automated billing system.

### 2 Time Study:

Aside from evaluating the repetitive nature of an office administrative function, also weigh its true impact on time consumption in relation to a presumed 8-hour work day.

### 3 Input from Staff:

Discuss with your support staff what routine functions (such as cookie-cutter client intake) can be handled directly by them, given the right automation tools.

### 4 Tailor to Your Practice:

Research what technology exists that pertains to your area of practice; if for example, contract drafting and management is your forte, then investigate systems that will streamline that practice area.

workflow unless automated. Therefore, an analysis of this type of function should be the starting point in determining whether it is time for your firm to implement automated systems and what areas of your law office administration can be automated. This analysis should also include repeat-client or regularly renewable

legal work that can, in many cases, be standardized.

By resolving the mismatch of partners and associates with low-value, non-billable work and bringing onboard automation, more high-value time can be expended for law firm productivity and profitability.

**“A LAWYER’S  
TIME AND  
ADVICE ARE  
HIS STOCK IN  
TRADE.”**

**- ATTRIBUTED TO  
ABRAHAM LINCOLN**



## Further Reading

1. <https://centerbase.com/blog/how-do-you-know-what-to-automate-at-your-law-firm/>
2. <https://juro.com/learn/legal-automation>
3. <https://www.clio.com/blog/law-office-automation/>
4. <https://www.thryv.com/blog/law-firm-automate-to-save-time/>
5. [https://bryter.com/blog/legal-automation-status-quo/?utm\\_source=google&utm\\_medium=organic](https://bryter.com/blog/legal-automation-status-quo/?utm_source=google&utm_medium=organic)
6. <https://legal.thomsonreuters.com/blog/how-automation-turns-thousands-of-tasks-into-one/>





## Jeffrey Brochin, Esq.

GREENPOINT STAFF COUNSEL AND  
CONTENT EDITOR

After receiving his Juris Doctor degree from The John Marshall Law School in Chicago, Mr. Brochin served as an Administrative Law Judge with the Illinois Department of Labor for six years where he presided over cases dealing with job separation issues and matters pertaining to contested Unemployment Insurance claims. He also co-wrote the agency's administrative rules, and periodically served as a 'ghost writer' for Board of Review decisions.

Following that position, he was Director of Development for a Chicago-area non-profit college where he was responsible for High Net Worth donations to the institution. For the next eighteen years he practiced as a solo practitioner attorney with an emphasis in the fields of Real Estate law and Commercial Contracts transactions, and was an agent for several national title insurance agencies.

In 2003 he was recruited to head up a U.S. title insurance research office in Israel, a position he held for four years, and between 2007-2017 he participated in litigation support for several high-profile cases. He has taught Business Law as a faculty member of the Jerusalem College of Technology, and has authored a wide variety of legal White Papers and timely legal articles as a professional legal content writer for GPL clients. Separate from his legal writing, he has co-authored academic articles on Middle East security topics that have been published in peer-reviewed publications.



## William H. Anderson, Esq.

MANAGING DIRECTOR

William Anderson is Managing Director and Head of Law & Compliance. He leads the GreenPoint practice in providing regulatory, legal, and technology solutions to law firms, legal publishers, and in-house law departments around the world, overseeing our team of experienced US attorneys and data and technology experts. Will has over 25 years' experience working with corporations to improve the management of their legal and corporate compliance functions. Will began his legal career as a litigator with a predecessor firm to Drinker, Biddle LLP. He then served as in-house counsel to Andersen Consulting LLP, managing risk and working with outside counsel on active litigation involving the firm.

Will has leveraged his legal experience interpreting regulations and appearing before federal (DOJ, SEC, FTC) and state agencies (NYAG) to oversee research and other areas at Bear Stearns. In this capacity, he counseled analysts on regulatory risk and evolving compliance requirements. Will also consulted on the development of a proprietary tool to ensure effective documentation of compliance clearance of research reports. Will then went on to work in product development and content creation for a global online compliance development firm pioneering the dynamic updating of regulated firms' policies and procedures from online updates and resources. Will holds a Juris Doctorate with High Honors from the Washington University School of Law in Saint Louis and is admitted to state and federal bars. He lives in Pawling, NY, with his wife and daughter.



**Sanjay Sharma, PhD**  
FOUNDER AND CHAIRMAN



## Pranav Menon, Esq.

LEGAL RECRUITMENT MANAGER  
AND DATA PRIVACY SPECIALIST –  
LAW & COMPLIANCE | GPESR



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