Document Automation

Getting Work Done. - Faster. Better. Cheaper.

How can Document Automation help me?

If you work in a role where you frequently need to create the same types of documents over and over again, document automation can be a game-changer.

It can help simplify your work by reducing the number of repetitive tasks and can remove data errors through rekeying and double entry.

This is especially true in legal and compliance and where the same letters (e.g. client engagement letter), forms (e.g. onboarding people/clients), checklists (e.g. information security), contracts (e.g. first drafts of contracts), compliance records (e.g. attestations), etc. are created time and time again.

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Can it really be that simple?

Document automation is often seen as a huge project, that needs technical resources, but it doesn't need to be.

With next-generation document automation, you can simply take your existing MS Word documents, and their layouts, and turn them into web applications that automatically allow a user to generate that document, complete that compliance form or provide that information.

With the benefit of technology, you shouldn't have to start from scratch each time. You should be able to upload a document once and use it multiple times.

Tag it   Upload it   Automate it   Activate it   Share it   Use it

What are the benefits of Document Automation?

At a recent well-known industry event, we noted the top 4 themes being spoken about were all things that could be resolved or improved with the use of document automation.

1 Simplification

Everyone wants to be able to do things quicker and easier. No one wants to get bogged down with the nitty-gritty if they don't have to. The legal sector has a reputation for making everything complex when it needn't be, so let's simplify things. Why recreate a document time and time again, when it can be uploaded once and used multiple times? Why over-complicate the process of document automation, when it can, in practice, be extremely simple?

2 Standardisation

The oneNDA project was an example for this use case throughout the event, but why stop at NDAs? By standardising other documents, you not only simplify the process, but also reduce the risk of human error and minimise training time. Not to mention, you will get more accurate documents and be able to turn around 1st draft copies much quicker.

3 Templates

Templates are a great way to standardise and provide a consistent look and feel for your documents. Using templates means you can ensure you are using the latest version of the document and that the styles, colour schemes, branding, and formatting required by the firm are maintained.

4 Automation

By automating your documents you will not only save time, reduce errors, improve efficiency, and have more accurate documents, but you will also improve both the client and employee experience. Things will be turned around quickly and with fewer errors – and that's a Win-Win in anyone's book.

Document automation takes away the need to reinvent the wheel when it comes to document production.

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