

## How to Get the Most Value from Legal Document Work

Is it possible to ease burdens, elevate work, and satisfy clients simultaneously? Focus on improvements that increase value from the client's perspective. It's easy when you use the value stream framework for workflow improvement.

### Changing How We Approach Change

Past transformation attempts have led to [local optimization](#), each of us improving our own work without regard to how our deliverable fits into the whole. As a result, the firm suffers and clients get less value. Then, clients demand discounts, [firms increase cost-cutting and process complexity](#), and the cycle repeats.

Instead of blindly adding more process, we must rethink our goals, considering our interconnected workflows and putting the client first. [Value stream optimization](#) is a change management strategy that helps us optimize holistically and deliver value to clients. This framework aligns lawyers and clients against waste and offers a unified vision where everyone in the legal ecosystem benefits and [quality increases](#).

### A New Framework for Legal Work: Seeing Value from the Client's Viewpoint

A [value stream is an end-to-end series of linked processes that chronologically combine to deliver value to a client](#). To map a value stream, include the individual tasks that make up a process and connect those processes to show how each person's work contributes to creating value. The value stream map will reveal three types of work: primary value-creating activities, secondary value-supporting activities, and waste. Value-supporting activities facilitate activities that create core value. Core value is defined only from the client's perspective—no matter how much effort it took or how it felt to employees to create it. This map will reveal inefficiencies in your process and help you determine which activities can be emphasized or optimized to produce more value for clients.

Value stream analysis helps to disentangle the core work and supportive work that go into a document deliverable, so you can focus on elevating the core work and optimizing supportive

work. This differs from standard process improvement, which treats both core-value work and value-supporting work the same, leading to overworking visible, lower-value problems.

## Applying the Value Stream Framework to Legal Documents

When applying value stream analysis, remember that the form of the deliverable is secondary to its function. Legal advice is a core value clients pay for. The document is the container, and the steps to build a document are value-supporting activities. Our documents must be as good as possible, but our legal advice must be unassailable. So save the most effort for the advice.

While some document defects affect the core value of a lawyer's work (like a typographical error that conveys the wrong parcel), other document defects affect secondary value (like a formatting error or rambling legalese). Correcting these errors is important because they can detract from the core value work, but avoiding these errors is work best left to machines.

We cannot give equal treatment to both types of document defects. Supporting work is not equally deserving of human attention. Humans are not the best solution to every problem, and our work is not devalued when we admit that.

Clients define what value is. Clients would be more satisfied if we spent less time on typos and more time serving as trusted advisors tailoring our legal advice to client needs.

## Mapping Value Streams in Knowledge Work

Value stream mapping is [useful in knowledge work](#) because it makes complex, invisible workflows visible and cohesive. While knowledge workers often resist process improvement and automation efforts, they may be more open to changes designed through value stream optimization because it creates a shared vision, allows flexibility, emphasizes value, and [scales improvements so they outpace complexity](#).

## Overcoming Skepticism to Align Goals

Historically, we've conflated value with process and made process synonymous with automation. So, if lawyers could argue automation wasn't ideal, they could block any transformation effort. And it worked.

To protect their value, lawyers claimed their work could not be automated because it was bespoke, undefinable, and built on tacit knowledge. However, that's just knowledge work. It's not unique to law and elevating value-creating activities and optimizing value-supporting activities has been [successfully applied for other knowledge workers](#) like software engineers.

With the [strategic goal of protective opacity](#), lawyers worked in non-optimized ways. This approach insulated lawyers from critique and commodification, but meant that the only ways to meet client demands were more hours or deep discounts. Now, [it's becoming unworkable](#). An approach that once protected lawyers is limiting them and putting them at odds with clients. But that can change with value stream optimization, which empowers lawyers to play a more deeply consultative role and define value based on clients' perspectives.

## Starting a Client-Focused Value Journey

As with all transformation efforts, you need a quick win. Choose an identifiable process you understand well that has set standards or methods—for example, the legal document creation process, as discussed in the [Effectiveness Project](#). The new method must yield better results, but be similar to the current method, so lawyers feel they can still work in their own way.

Separate the work into value-creating activities to be elevated and value-supporting activities to be optimized. Technology can lighten the value-supporting workload so humans can devote more time to preparing legal advice without reducing billable hours.

If you [use technology in your value optimization journey](#), choose software that reliably does what humans cannot (long durations of detailed tasks with consistent results) and elevates the work humans can do (thoughtful, strategic storytelling and persuasion). Legal-specific point solutions will give lawyers a sense of relief and yield more value for clients by freeing up more time for advice and counseling. For legal documents, editing software like [WordRake](#), proofreading software like [PerfectIt](#), and document styling software like [DocStyle](#) are great point solutions that fit within the elevate/optimize plan. Editing software like [WordRake](#) provides depth, breadth, and flexibility in legal editing so lawyers can maintain their work style while reaping the benefits of automation. Roll out software and processes that support humans, rather than creating more processes that humans must support.

## Leaving Room for Future Growth

New solutions should leave room for iteration and growth. Stop looking for cutting edge end-to-end solutions and look for ways to ease effort for humans. One of the great aspects of working with documents is that most of us work in Microsoft Word, which has longevity and worldwide adoption, and provides the valuable connective tissue for flexible point solutions to

work together. Seek solutions that have enough interoperability that they will not block you from future transformation!

## Satisfying Clients by Focusing on Value

Looking at a value stream, rather than narrow process improvement opportunities, encourages a holistic approach to think about systems and strategically align the daily activities of lawyers with generating value for clients. Though change initiatives can inspire fear, no lawyer would dare argue against creating value. Using value stream optimization, lawyers and their clients have aligned goals.

For lawyers, the document is the deliverable, so finding a way to address value-creating and value-supporting document work will have the biggest impact. If you do the value-supporting work efficiently, then you will do the core-value work effectively, and that will always satisfy clients.

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## About the Author

Ivy B. Grey is the Chief Strategy & Growth Officer for WordRake. Before joining the team, she practiced bankruptcy law for ten years. In 2020, Ivy was recognized as an Influential Woman in Legal Tech by ILTA. She has also been recognized as a Fastcase 50 Honoree and included in the Women of Legal Tech list by the ABA Legal Technology Resource Center. Follow Ivy on Twitter [@IvyBGrey](#) or connect with her on [LinkedIn](#).