Hey everyone, Ernie Svenson here. And welcome to this episode of Law Firm Autopilot. In this episode, we're still talking about the third pillar of the Law Firm Autopilot success blueprint.

But, whereas last time we've talked about systems, today we'll be talking about automating a law practice.

What exactly is automation? To me, automation is simply the execution of a process or workflow with little or no human involvement. Automation can be triggered by human, or it can happen automatically, if certain conditions are detected by a device.

For example, a motion detector that turns on lights in house when it senses motion, is automation with a trigger that requires no human to initiate it.

Automation is becoming increasingly prevalent as computer technology becomes less expensive and more prevalent. Just because we're used to experiencing automation, doesn't mean we're adept at wielding it well to improve our law practices.

We need to be strategic about our use of automation, and the first strategic question to ask is, what things are suitable for automation in a law firm?

Here's a partial but helpful list:

Document preparation: since that's what lawyers do a lot of, this make sense, right? We have tools that make it easy to automatically format documents, track revisions, etc.

Number two, **scheduling appointments**. It's silly to have people figure out the best time to have a meeting by emailing each other back and forth. Automation can take over this task quite easily.

Common workflows, like **handling initial client intake and communications**, can also be automated.

Bates-stamping documents, which is common in litigation matters, is now routinely done by automation instead of by paralegals. And it should not be done in any other way.

Marketing online could be automated to a surprising extent as well.

These are all things that can be automated. But let's circle back and dig a little deeper into a couple of these categories, starting with **document automation**.

Document Automation

This is where most law firm automation happens or where it should it happen. If you bill for your time, then it's especially important to automate document preparation so you can deliver your services cost-effectively.

But document automation is important for personal injury lawyers too. Because automation means getting work done with fewer errors in addition to doing it faster.

There are two types of document automation, simple and complex.

Simple document automation involves quickly replicating often used phrases, contract clauses or words. All lawyers use text phrases that can be inserted faster by using automation than by typing or even by using computer dictation.

For example, **Microsoft's Quick Parts** tool lets you save commonly used phrases and quickly trigger their insertion. The phrases can be long or short.

Some third-party tools can insert text into any kind of program or into any text input box, regardless of whether it's a Microsoft-created program. One of the most popular of these tools is something called **TextExpander**, which started out as a Mac only program but now works on Windows PCs as well.

Let's not overlook this simplest kind of automation, keyboard shortcuts. If you're not using keyboard shortcuts where ever possible then you're not cultivating an automation mindset.

An automation mindset is what you need to take on complex document automation.

Complex document automation involves using branching logic, conditionals, and so forth, to intelligently modify text, or insert it where needed. **The most popular tools here are things like HotDocs, Pathagoras, or TheFormTool**.

Some of the programs are things that you can figure out how to use on your own, but some like HotDocs are best incorporated with the help of a trustworthy consultant.

Now, most lawyers are not getting enough traction with the document automation, simply because they're not willing to work with a consultant, or don't know which ones to work with. If you use Practice Management Software, you should be aware that many of the Practice Management software offerings out there are now starting to offer some level of form creation.

For example, Clio, MyCase, and Smokeball are all examples of this.

Let's talk about scheduling.

Scheduling

We mentioned earlier the back and forth emails that are often used to schedule a meeting or deposition where multiple people are involved.

But the best way to schedule a meeting with multiple people is to use an online service like Doodle, which lets everyone simultaneously indicate the days and times that are suitable for them. Then the software displays for all to see, which days and times are open for everyone.

If you want to automate one-to-one appointments that people make with you when they call you up to book an appointment, you can use a service like Calendly, or ScheduleOnce, or the one called Acuity. Now, Acuity, which is the one that I use even lets you require payment upfront for someone to book a call, which is beneficial in many situations.

Again, all of these happens automatically with no human intervention or no intervention on your part.

Just to make sure you understand what that means, a prospective client could:

1. visit your website.

2. decide to book a call with you.

3. fill out a form online to pick a day that works best for them and you.

4. the appointment would automatically show up on your calendar, and

5. the prospective client would then automatically get reminder emails or texts or both, before the call, to make sure that they will show up.

All of this would require zero involvement on your part or on the part of any other human in your firm.

These are just a few examples of how you can automate your practice.We'll be covering a lot more of this in future episodes.

Of course, if you're here to learn more faster, you can visit the lawfirmautopilot.com site and check out the information that I have posted there.

In summary, **there is a lot that you can automate in your law practice, but you should go about this systematically** and identify areas where you can quickly get a big impact.

Simple automation is pretty easy and you should trying to use it as much simple automation as possible, as quickly as possible. But, **complex automation will probably require you to find a trustworthy consultant**.

Okay, that's it for this episode of Law Firm Autopilot. In the next episode, we will be talking about delegation. I look forward to seeing you then. Until then, I wish you the best and best for your law practice.