Better Client Service Through Process Automation

Gina Bongiovani: @LawyerGina
Britt Lorish: @blorish

Taking Action

• Step 1: Identify Key Processes
• Step 2: Convert into Daily Efficiencies
  • Saves time
  • Reduces occurrence of errors
  • Helps manage client expectations

Shortlink:
https://goo.gl/JiVrH9
Why should I automate?

**Internal Benefits**

- **GOAL**: Continuous improvement of client service
- Diagnosis + Treatment Plan
- Maximizes efficiencies by reducing man hours
- Reduction of man hours → reduces frequency of human error
- Frees up time for more billable activities
- Once established, easier to analyze for improvement
- Simplifies onboarding and training

---

**Client Benefits**

- Helps demystify the process
- Creates consistency across experiences (helps with referrals)
- Reduces mistakes, dropped balls, pointed fingers

---

When am I done automating?

- Continuous Improvement
- Plan & Design
- Implement
How to Automate - The Right Tools

- Features for Consideration
  - Workflow functionality
  - Document automation functionality
  - Task and calendar management functionality
  - Communication/notifications

The Foundation: Workflow Functionality
The Right Tools

- Integration Considerations
- Features + current technology
- Build a list of non-negotiables + "nice to have" items
- Create a technology plan
- SaaS or traditional software?
- No product is perfect
How to Automate - The Right Tools
• Product Examples
  • Centerbase+
  • Tabs3/PracticeMaster
  • ActionStep+
  • Clio+
  • RocketMatter+
  • Orion
  • PracticePanther+
  • ProLaw
  • Abacus
  • Cosmolex+
  + indicates browser based products

Realistic Expectations & ROI
• Understand process
• Acknowledge how it can be improved
• Agree on modifications
• Map it out
• Find the tools
• Understand technical tasks
• Test and roll out automations
• Tweak as necessary/kill it

Realistic Expectations & ROI
• ROI is amplified in flat fee or alternative fee environments
• Reduce staff time
• YOU play the most important part in keeping TECHSHOW exciting. Please complete the Speaker evaluation before you leave.

• Reserve the dates!

TECHSHOW 2019: February 27 – March 2, 2019

https://goo.gl/JiVrH9