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enact. I think starting smaller can be more effective, as people are more likely to be engaged. You need to consider the balance of the subject matter expert's investment of time in the automation design process and the output they receive. The longer the project is ongoing without producing something, the sooner you risk interest dying down."

"It's also useful to realise that you don't need to automate 95%. Around 70% or 80% can be good enough and still give you a valuable return on investment. It will possibly achieve greater traction, as there can be an inherent resistance to using something that appears to decrease the use of people's specialist knowledge too much."

Fortunately, Ballard has also recently been able to provide the board with a tangible return on their investment. "Every three months I present the usage stats and calculated ROI. For example, we recently saw a time saving of 112 hours across 124 fee-earning documents based upon a conservative average of 20 minutes saved per document – in some cases it can be an hour," she says. "Multiply the hourly rate across those figures and the numbers speak for themselves."

But it's about "the qualitative as well as the quantitative," she continues. There is, of course, the matter of what the fee earners might now be able to do with their time savings that adds more value to the business. "At the start of each new project we complete the project specification form to gather information and assess ROI on a project at the outset – then use it to check back in with the end user and share with the stakeholders. We ensure it includes qualitative user feedback.

"Our knowledge lawyers now draft precedents with the potential to automate in mind – but my absolute top lesson is to have a fully agreed, finished precedent in place first. For a firm with multiple offices, it can be a lot of work to get to that point as things change, including the law! But you have to try to future-proof for uptake to be high – it's critical that partners, the risk team, and so on, are all happy and agreed on the content."

Back to Penningtons specifically, the next phase is to make the case for automating some employment contracts – and in summer 2018, she expects to launch a suite of probate letters.

She explains: "People often think of automation

as being for very corporate documents. But one of our divisions relates to private individuals, so we need to apply it there as well. The team has drafted over 70 potential precedents that can be used in the probate process. Now the information may only need to be entered once. If a change is needed the risk is reduced through automation. There's greater control, plus it's more efficient to have everything stored in the same place.

"We always have an eye to the future and where this could lead in terms of client interaction further down the line. Contract Express is the market leader in document automation – our clients know we use it. Clients expect us to show we're using technology where appropriate to save time and improve service. They can be reassured we're driving efficiency, and that they should see the results of that reflected in the service."

Next on the roadmap, she says, is to explore opportunities for greater client collaboration, and potentially self-service, with automation – most likely beginning with the private client team.

Gold times

Ultimately, the choice of Contract Express as an automating tool was a very easy one for her colleagues who initiated the automation drive at PM, says Ballard. They were already familiar with its benefits from their time at another firm, as she was herself. "Thomson Reuters is also very flexible – they gave us several options for licensing, supported our pilot with great interaction and authoring our initial draft," she says.

"The partnership has always been great, and there's a really collaborative element in the product development. There has clearly been a huge amount of investment in pushing the product further; they take things we report back on board, and come back with solutions to our challenges."

She also singles out the team of customer success managers and the annual Contract Express user forum (which the firm recently hosted) as especially useful parts of the overall learning package – the latter described as "gold dust, the go-to event of the year."

Automation and process improvement is a continuous journey for Penningtons Manches, so it makes sense to have the right fellow travellers by and on your side. ▀