

EVERYTHING HAS A PROCESS PART 2

HOW TO IMPROVE YOURS

Once you have identified a process in your firm (see Part 1), you can start improving it. Your processes may vary by matter, but a process exists for everything you do. The hard part is judging whether the current version is efficient, and making changes that actually help.

Today, “improve the process” increasingly means deciding whether artificial intelligence or workflow automation belongs in a given step. That’s a legitimate question, but it’s the last question, not the first one. Before you automate anything, you need to understand what is inefficient, and why.

Take scheduling hearings, for example. In some jurisdictions, you must coordinate with opposing counsel and witnesses while accounting for the court’s availability. If your staff contacts opposing counsel to pick a date before checking the court’s calendar, that coordination effort may turn out to be wasted. Most people would check the court calendar first, keeping in mind that if it takes too long to agree with the other side, they may have to recheck the court calendar more than once. Scheduling hearings is usually simple. But the example shows that even simple processes have easier and harder ways to run.

Process improvement may involve minor changes to existing steps. Other improvements require re-engineering, upending the current method entirely. The goal is to do more with less, without losing sight of the people doing the work, the work itself, or the technology involved.

These tips will help you evaluate potential process improvements.

LOOK AT THE BIG PICTURE

The view from 10,000 feet sometimes reveals issues right off the bat. Before you dig into individual steps, step back and ask what the process is supposed to accomplish, and whether it reliably does that.

A few questions worth asking at this altitude:

- Does this process consistently produce the outcome we want?
- Would a new hire understand why we do it this way?
- Would we design it this way if we were starting from scratch today?

If the honest answer to any of those is no, you have found a place worth a closer look.

EVALUATE ISSUES IN SMALLER PIECES

Once you have identified an issue, go back to the process map you built in Part 1. Trace every step: who performs it, when, and what else it affects. Breaking a big frustration down into its component steps usually reveals a simple fix hiding inside what felt like a complicated problem.

ISOLATE THE BOTTLENECK

People often point to the step that feels slowest, but the real delay is frequently upstream or downstream of it. A signature that takes three days to collect may not be a slow signer; it may be a document that sits in an inbox for two of those three days before anyone sends it. Trace the handoffs on either side of the pain point before you decide what to fix.

LOOK AT THE ISSUES FROM EVERY ANGLE

Don't limit yourself to the steps taken and how you might rearrange them. Consider the process from three angles:

- People—Is the right person handling this step, given their skills, workload, and rate?
- Technology—Are you fully using the tools you already pay for, before evaluating new ones?
- Structure—Could the step be combined with another, done in a different order, or eliminated outright?

A process problem that looks like a technology gap is sometimes a people problem, and the reverse is just as common.

USE AVAILABLE TECHNOLOGY

Don't fear automation. It wins big when the price fits your budget and the tool reduces delays and complications.

START WITH THE TOOLS YOU ALREADY HAVE

Start with the system that should remain the source of truth (typically your law practice management system). Adding a separate tool may create another login, another copy of client data, and another place where a workflow can fail. When comparing products, consider permissions, audit history, integration quality, data export, security terms, support, maintenance effort, and total cost. A demonstration built around your actual process is more useful than a general feature tour.

WORKFLOW AND TASK AUTOMATION

Most practice management platforms already include automation you may not be using: Clio and MyCase, among others, can auto-assign tasks, send reminders, and update matter statuses when a triggering event happens. General-purpose tools like Zapier or Make can connect apps that don't talk to each other natively, such as pushing a new-lead form submission into your intake workflow without anyone re-typing it.

DOCUMENT AUTOMATION

If a process involves drafting the same type of document repeatedly, with only a handful of details changing each time, document automation platforms such as Gavel and Clio Draft turn that drafting into a short questionnaire. Someone answers a handful of questions, and the tool assembles the document. This works well for engagement letters, routine motions, and standard client correspondence.

ARTIFICIAL INTELLIGENCE

AI can improve a workflow without controlling the entire workflow. Give it a defined task, approved source material, a required output, and a clear review point. For example, an AI tool might turn an intake transcript into a draft matter summary, but a staff member should verify names, dates, conflicts information, and the proposed next step before anything enters the matter record.

AI DRAFTING AND REVIEW ASSISTANTS

Legal-specific AI tools, such as Spellbook for contract drafting and redlining, can speed up the first pass on repetitive document work. General-purpose AI assistants can do the same for routine client updates or internal summaries. Treat the output the same way you would treat a first-year associate's first draft: useful, faster than starting from scratch, and still in need of a lawyer's review before it goes anywhere near a client or the court.

ETHICS REMINDER

Comment 8 to ABA Model Rule 1.1 requires lawyers to understand the benefits and risks of relevant technology, and ABA Formal Opinion 512 extends that duty specifically to generative AI. Automating a step does not remove your obligation to supervise it. Under Model Rules 5.1 and 5.3, a partner or firm remains responsible for work product produced with the help of automation or AI, the same way they would be for work delegated to a paralegal or associate. Build a review step into any automated process that touches client communication, legal analysis, or court filings.

Whatever technology you add, weigh the cost of buying and maintaining it against the time it saves. A tool that saves ten minutes a week rarely justifies the subscription or the learning curve.

BE OPEN TO CHANGE

Improvement requires change. Without change, things stay the same, and nothing gets better.

PILOT BEFORE YOU ROLL OUT

Test a change with one attorney, one practice area, or one matter type before rolling it out firm-wide. A short pilot surfaces the problems a whiteboard session never will, and it gives you a specific group of people to ask for honest feedback. Set a date to revisit the pilot and decide, based on what happened, whether to expand it, adjust it, or drop it.

Change isn't easy; there will be bumps in the road. Making changes may cause new problems to crop up or reveal issues no one knew existed. Some people may resist, and you may lose people who can't or don't want to keep up. But if the changes you make are for the greater good, your firm and its processes will be stronger for it.

IMPROVEMENT HAS LIMITS TOO

Automating a broken process just makes it fail faster. If the underlying steps don't make sense, fix the process before you add software to it. More technology is not automatically better technology, and efficiency is not the only thing that matters. Client experience, ethical obligations, and professional judgment don't show up on a time-savings spreadsheet, but they still count.

BOTTOM LINE

Go back to the process you mapped in Part 1. Identify the single biggest source of friction, and test one change before you roll it out anywhere else.