

# Top 6 Processes All Law Firms Should Automate

1

## New Matter Intake

Automatically collect important information from attorneys, paralegals, intake specialists, and others and make intake trackable and searchable. Digitize client collaboration, sending instant notifications when a task needs completion rather than time-consuming emails.

## Case Management

Simplify case management by collating case information in one portal or workspace—digitizing document, contract and data management to improve collaboration. Integrate with the third-party systems your teams use every day like RecordTrac and Verisk.



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## Client Billing

See billing information in a central location to simplify billing and payment collection. Auto-generate client invoices with contract details and immediately update accounting records.



## Anti-Money Laundering

Streamline your client on-boarding with automatic (“know your customer”) fraud detection and credit verification.



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## Document Production Requests

Allow business services teams to seamlessly manage requests for things like printing, CD burning, copying, binding, and transcript services in a queue based on priority. Produce monthly reports to generate a bill to recover the cost from each department/function.



## Tax Free

Quickly route tasks through local taxation experts to validate whether matters are tax exempt.



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**[Technology] is *not* replacing lawyers** but it is contributing to the demise of traditional legal culture, replacing it with a **diverse, competitive, customer-aligned, accessible, and cost-effective** one where ‘legal professionals’ deploy technology and process to solve business challenges.”

Mark A. Cohen, Forbes<sup>a</sup>

25%

of internal legal requests will be handled by **virtual legal assistants**

33%

of legal teams will have dedicated **technology experts**

According to Gartner, Inc.<sup>b</sup>

## Why Automate?

1

### Streamline service delivery

Reduce errors, increase quality and deliver exceptional service through standardization and automation of case-related processes.

2

### Optimize resource allocation

Maximize your resources by ensuring that the right person is focused on the right job and has the information they need to make accurate decisions.

3

### Improve customer experience

Improve visibility and customer service by providing customized portals that show real-time status and enable self-service for all clients.

4

### Protect and grow margins

Increase revenue and protect margins by automating time-tracking and billing to reduce errors and make improvements based on past performance.

5

### Focus on compliance

Reduce the cost of compliance by automating and auditing key processes.



#### About K2

K2, a leader in business automation, provides low-code software solutions that enable companies to simplify the creation of modern business applications and deliver results quickly.

Learn more at [K2.com/legal](https://k2.com/legal)

#### Sources

a. <https://www.forbes.com/sites/markcohen1/2019/05/03/getting-beyond-the-tech-in-legal-tech/#7f25010b16fc>.

b. <https://www.gartner.com/smarterwithgartner/4-legal-tech-trends-for-2020/>