

excellence  
@work



EBOOK

# Disrupting the Legal Industry

How 5 Legal  
Organizations Drive  
Process Excellence



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# The state of **automation** in the legal industry

The legal industry has often faced resistance from stakeholders to modernize and automate with new technologies. Many legal processes are manual and paper-based, handled through spreadsheets, email, and documents that need to be printed and scanned.

But this can lead to inefficiencies that result in lost time, revenue, and client satisfaction. Now more than ever, legal organizations are realizing that in order to compete in an increasingly automated world, they'll need to embrace technologies that can deliver end-to-end process optimization and transparency.

**23%**

Of lawyers' daily tasks could be automated

*McKinsey Global Institute, 2017*

**1/4**

Of all legal tasks will be handled by "lawbots"

*Gartner, 2020*

**33%**

Of corporate legal departments will have a dedicated legal technology expert by 2023

*Gartner, 2020*

### **Manual tasks create inefficiencies**

A study by McKinsey found that around 23% of a lawyer's daily tasks can be automated with existing technologies. This is significant because in the legal industry, time is money.

Manual legal processes delay case activities and lead to a lack of transparency in case status for key stakeholders. Yet lawyers spend a significant portion of time on non-value-added activities like administrative tasks, configuring technology, and business development—at a great cost to their organization.

The firm's most valuable fee earners can end up chasing information internally and externally. Difficulties sharing case-critical information can slow down progress, particularly around critical points in case management such as court appearances. And of course, paper records are much more prone to loss, misfiling and compliance breaches.

### **Client satisfaction and retention rates**

Manual processes mean costly and time-consuming case management practices, which inevitably impact the client and create a negative impression. For example, central to the viability of any law firm, new matter intake occurs at a point when the client is free to go elsewhere.

Today, clients expect a higher level of customer service from the legal industry than they did just a decade or two ago. Time-consuming intake processes may result in lost business or reduced client retention rates.



## Technology challenges

While more firms and legal organizations now recognize the need to automate key legal tasks and end-to-end processes to improve efficiency, many organizations face technology challenges. First, stakeholders may be resistant to change, particularly if a new user interface seems complex.

Besides, organizations that store information digitally can still experience delays when trying to access and compile critical information. Most organizations have multiple line-of-business systems that don't necessarily talk to one another, leading to siloed systems that make it difficult for law professionals to access information when they need it.

This creates problems in day-to-day operations. Duplicate data entry into more than one system remains widespread. This wastes valuable time and can lead to over-complicated workflows and data inconsistencies.

## The future of legal process automation

Fortunately, technology has now caught up with the needs of law firms. Intelligent process automation can help law firms and legal organizations to transform the client experience with improvements in workflow, case management, and access to information.

From the right process automation platform, you can align core business data across all systems from a single source of truth. A central access point for information, no matter which system it might be stored in, can make it much easier for employees to find locate, manage, share and report on casework.



# How 5 legal organizations automate mission-critical processes with K2

With K2 intelligent process automation, legal companies worldwide have automated mission-critical processes to save time and improve the client experience. In an increasingly competitive landscape, these organizations have liberated staff from the burden of paper-based processes, tackling challenges big and small with end-to-end automation.

Learn how 5 leading organizations in the legal industry are using K2 to drive excellence in customer service, operations, sales and marketing and more.

## Driving excellence@work

- Streamlined operations
- Increased efficiency and profitability
- Custom processes for intelligent case management
- A single source of truth for data
- Improved client satisfaction
- More availability to focus on value-added activities

SHOOSMITHS

SHINE LAWYERS

Potter  
Clarkson

CountyCourt  
VICTORIA

ISRAELI COURT  
ADMINISTRATION



## Challenge

### A fragmented workflow environment

Before implementing K2, Shoosmiths dealt with a complex technology landscape which included 13 legacy case management systems from various brands. While Shoosmiths had long recognized the importance of workflow in the context of legal case management, there was no single version of the truth.

The firm faced a number of challenges in its day-to-day operations.

- Documents were spread out amongst different systems, making it difficult to quickly track down automation.
- Existing systems did not sufficiently integrate into SAP and SharePoint.
- Legacy workflows were time-consuming.
- Employees struggled with a steep learning curve for some user interfaces.
- GDPR regulations required more defined processes for handling client information



## Solution

**“The time savings that we are seeing from K2 for English conveyancing alone will allow us to handle a higher volume of business without having to take on more staff.”**

**- Shane Scott**

IS Director, Shoosmiths

### Driving excellence across the business

Shoosmiths now has K2-based process workflows in four key areas of its business: HR functions (employee self-service and onboarding), English conveyancing, clinical negligence case management, and land plot conveyancing for developers.

- By reducing 13 case management systems into one, the firm is saving £160,000 each year.
- The use of K2 has contributed to significant time savings across all areas of its business.
- K2 sits across SharePoint and SAP, allowing for documents and client matters to be held in one place.
- Employees enjoy a more user-friendly interface.
- Within the conveyancing function alone, the firm estimates it saves up to 60 minutes per case handler per day. This equates to approximately 800 hours per week across the function.

# £169K

Annual savings

# 40K+

People hours saved annually

# 20%

Development time saved



## Challenge

### Time-consuming new client intake

Shine Lawyers works tirelessly to help its clients get the best possible outcome. But not every grievance that comes through its call centers is a viable case.

Originally, when prospective new clients reached a call center, representatives launched a Q&A to gauge whether they had a viable lawsuit, launching a manual intake process that created several challenges for the business.

Shine Lawyers is an Australian law firm specializing in personal compensation claims; disability, insurance and superannuation claims; and class actions—on a “no win, no fee” basis.

- Q&As would last upwards of 30 minutes—a substantial time commitment since this was not necessarily time the firm could bill for.
- When cases did pass the initial Q&A stage, additional information had to be gathered manually, increasing workloads.
- After hours, clients were unable to get a direct response immediately after filling out an online contact form, resulting in lost business.

Shine knew it needed to shift its customer service model to allow clients to receive services when it was convenient for them—not just when it was convenient for the firm.





## Solution

### Driving excellence in customer experience

Shine Lawyers enlisted the help of K2 partner rapidMATION to develop an intelligent process automation solution that integrated K2 with UiPath's RPA capabilities to streamline client onboarding without compromising the customer experience. This intelligent solution is disrupting the industry in several ways:

- K2 SmartForms are interactive and intelligent, automatically sending clients down the proper path depending on whether their case was deemed viable.

**“We've taken the pain and mundane from the call center and we've shifted it to a technology platform, which allows them to then do more customer-centric, value-added activities as opposed to just Q&A.”**

**- Luiz de Almeida**  
CIO, Shine Lawyers

- With an immediate response to viable case inquiries, Shine is improving the customer experience and building a healthy pipeline of appointments that may otherwise have been lost.
- SmartForms integrate into Shine's content management systems as well as the Google API, so the solution can access calendars at the relevant Shine branch and find times when relevant lawyers are available.
- Automated process steps have dramatically reduced the amount of manual work involved in client onboarding.
- Call center representatives and legal professionals are able to focus on more value-added work.

# \$290K

Worth of new cases booked in the first 8 weeks of a soft launch

A full-service intellectual property law firm, Potter Clarkson has expertise in patents, trademarks, designs, litigation, licensing and related consultancy.

## Challenge

### Keeping up with a higher volume of new business

Potter Clarkson has grown rapidly in recent years, expanding from one office to seven offices across four European countries. At the same time, the firm has introduced new consultancy services, all of which have increased the amount of work coming into the business on a daily basis.

Prior to implementing K2, this rapid growth presented several challenges for the business:

- It could take up to three days to complete the opening of a new matter in the central records management system and then collect and share relevant documentation.
- There was a lack of consistency in processes across different teams and offices in seven cities.
- Attorneys used email and telephone to request changes to matter records, which made it difficult to identify the status of around 6,000 change requests per month.
- Paper files were difficult to manage amongst different offices and remote teams.





## Solution

### Driving excellence in business processes

With K2, Potter Clarkson can ensure that all employees (across each of its offices) use the same standardized business processes to work efficiently and deliver highly professional services for clients.

- A completely automated and standardized new matter management process has reduced the amount of time to set up a new record to just a few hours.

**“K2 has become business critical. It enables us to grow our business and open up new offices, safe in the knowledge that all our employees throughout Europe are using the same consistent and robust processes.”**

**- Philip Morris**

IT and Operations Director, Potter Clarkson

- The firm can more effectively manage increased volumes of requests from new and existing clients.
- When new employees are recruited, it is far easier for them to understand and conform to the correct procedures.
- With a single user-friendly interface, attorneys can monitor the progress of requests and see digitized documents.
- Change requests now take less than 30 minutes from beginning to end, a process that once took several hours.
- K2 helps Potter Clarkson to retain ISO accreditation for quality management (ISO 9001) by improving consistency and traceability.
- Digitized processes allowed the firm to shift to remote working during the rise of COVID-19 cases.

Increased visibility into

# 6,000

Change requests per month

# 1,000

Items of digital mail delivered and prioritized each week

# 220

Employees now use K2 processes to work remotely

## Challenge

### Overwhelming paperwork from legacy processes

As the County Court of Victoria heard thousands of cases each year, court staff struggled with overwhelming paperwork. Legacy case management systems and paper-based processes created several challenges for the court.

The County Court of Victoria is the principal trial court for Victoria, an Australian state with a population of 6.4 million. The court hears about 12,000 cases a year, including criminal and civil cases, and has jurisdiction over all criminal matters except murder and treason.

- Physical inboxes were overflowing with hundreds of pieces of correspondence that had to be individually printed and assigned
- Auditing and compliance required numerous people passing information back and forth with no top-down view of all activities.
- It was difficult to gain insights into data and evaluate court proceedings for bias or other potential trends.



## Solution

### Driving excellence for 6.4 million people served by the Court

i2 Management, who handles the Court's IT resourcing, recommended using K2 to digitally transform several complex manual processes using business process automation. With K2, processes are more straightforward, with greater transparency into mission-critical areas.

- K2 helped the Court connect different IT systems, replace paper processes, and capture information electronically.

**“It's been life changing for the judicial registrars. They would fear this process previously, and now it's just so easy. What once took two people 6 days now takes one person half a day.”**

**- Grace Ong**

Project Manager - Digital Transformation, County Court of Victoria

- Employees save time and serve the public more effectively.
- Version control is no longer an issue as judges and stakeholders can all work from the same document.
- Staff can now easily see a unified list of audits that need to be performed across the appeals court and civil court, so audit processes are easily routed to the appropriate owners.
- Internal audits previously took 3 days and several people, but today they require one person and just 4 hours.
- Now, paper-based forms have been eliminated, and information resides in a data warehouse, allowing them to better tell the story of what is happening in court.

**88%**

Decrease in audit time

**90%**

Faster at processing court orders



# ISRAELI COURT ADMINISTRATION

## Challenge

### Dealing with a fragmented workflow environment

At any one time, the judicial system in Israel can be handling as many as 500,000 live cases, relating to everything from homicide to traffic offenses. The Israeli Courts wanted to better serve their constituents, but manual, paper-based processes presented multiple challenges.

- Bulging files of case documents were physically passed from desk to desk and office to office, wasting valuable time on administrative tasks.
- Unnecessary delays sometimes occurred when files were overlooked or misplaced.

The Israeli Courts organization operates as an independent unit within the Ministry of Justice. It oversees the operation of all courts in Israel, including the Supreme Court, district courts, magistrate courts, traffic courts, family courts, juvenile courts and employment courts.

- The central administration function had little visibility into the status of cases, as they passed from stage to stage in the judicial process.
- Lawyers and police had no means of tracking their cases.
- Up to 30% of open cases had not been acted on for more than a year, simply because there was no automated recordkeeping to trace case status by employees or external stakeholders.



# ISRAELI COURT ADMINISTRATION

## Solution

### Driving excellence across 800,000 new cases per year

K2 joined forces with Focus Integration Systems, an IT systems-integration partner, to design and build a sophisticated case management solution specifically for the Israeli Courts. This pioneering solution comprises around 150 K2-based workflows and creates a seamless electronic process that covers the entire lifecycle of each legal case filed, from submission to judgment.

- Documentation and case history is available instantly allowing the courts to process cases far more efficiently and accurately.
- Clerks can now spend their time on more value-added activities.

**“Automated electronic processes free up our clerks to do more professional legal work, rather than simple administrative tasks. Now, they can use their time more effectively.”**

**- Yarden Yardeni**

Senior Program Manager, Israeli Court Administration

- Risk of administrative errors has been reduced.
- Work is now allocated and assigned more efficiently to the right parties.
- Of the 100,000 new documents that enter the court system every day, 40,000 are received or generated electronically. The remaining 60,000 paper-based documents are now electronically scanned and tracked upon receipt.
- This has the added benefit of reducing the need for physical storage space and filing cabinets—further increasing efficiency by reducing office size and expense.
- 8,000+ external users, including police and legal firms can access the case management system remotely via a web-based interface.

# 800K

New cases per year  
systematized with K2

# 8K+

External users include judges,  
attorneys, and police officers

# 10 key takeaways from 5 legal

## industry disruptors

- 1.** Transforming just one area of a legal business can result in significant time savings, allowing organizations to take on a higher volume of business without additional hiring.
- 2.** A user-friendly interface can have a noticeable impact on adoption and efficiency.
- 3.** Integrating RPA with intelligent process automation is an innovative way to transform end-to-end processes and allow people to focus on more value-added activities.
- 4.** Focus on the business outcome (such as customer experience) to guide you to the right technology solution—not the other way around.
- 5.** Consistent processes help to prepare you for future growth and standardization as your legal business scales.
- 6.** Spend time improving processes and allowing for remote access today so you can be prepared for an urgent crisis response in the future.
- 7.** It's important to reassess legacy workflows and processes that have become standard in your organization but leave stakeholders with a sense of dread.
- 8.** Data visibility can help legal organizations tackle internal biases and find other trends that may affect the outcome of a case.
- 9.** Intelligent case management addresses the entire lifecycle of legal cases from beginning to end.
- 10.** Eliminating physical documents can have unexpected benefits to organizations that have piled on paper over the years.



# 4 key steps to get started with legal process automation

## 1. Outline business outcomes

When organizations become focused on digital transformation, they may mistakenly begin by implementing the most advanced technologies before determining key business goals.

IT teams should work with senior management to create a strategic and business-driven plan for automation that is directly related to the company's overall goals. After aligning on business goals, IT teams and business leaders can move on to assess which technologies are suited to those outcomes.

## 2. Garner support from stakeholders

Once you are clear on the organization's business goals, you can emphasize the potential ROI and productivity gains to garner support from decision-makers. Present a vision of savings, visibility, compliance, and real-time decision making.

Be prepared to present real case studies from organizations like Shoosmiths and Shine Lawyers, who have seen a significant transformation since implementing their intelligent process automation solutions.

## 3. Evaluate tools

Scalability should be a key factor in assessing process automation solutions. The solution should be able to integrate line-of-business systems such as SAP and SharePoint. Just as critically, you should be able to integrate RPA and artificial intelligence for an intelligent automation approach as you grow and scale.

Law organizations should also consider a user-friendly interface and the availability of pre-built solutions for common legal tasks.

## 4. Measure and optimize

Look for a solution with easy-to-use analytics and reporting so you can continuously optimize processes for efficiency and cost savings.

Out-of-the-box or custom process metric reports can help you to keep track of things like how many workflows are running and how long it's taking each workflow to complete, while bringing together line-of-business data.

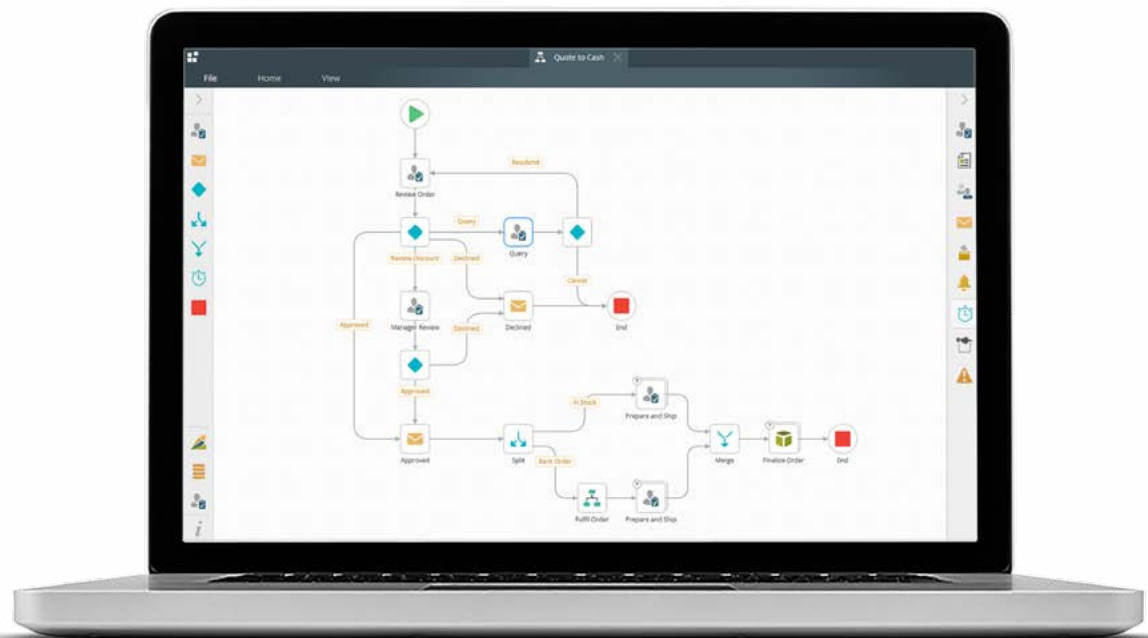


## Transformative Automation. Simplified.

K2 Nexus delivers transformative results faster by automating and continuously optimizing business-critical processes that connect structured and unstructured data, people, process and systems—with far less code.

More than 4 million users in over 84 countries are using K2 to take control of their business processes, increase visibility and improve operational efficiency.

To learn more, visit [K2.com](https://k2.com).



“

At K2, we've been on a journey to  
create transformative automation  
that connects your people, systems  
and processes. K2 Nexus is the next  
step on that journey and will deliver  
the results that matter most to your  
business – profitability, productivity  
and exceptional customer service.”

Burley Kawasaki, Chief Product Officer, K2



[Learn more about K2 Nexus](#)