

What to automate first: a checklist for law firms

Where to begin when there is more work to automate than time to do it.

Start with repeated work

Look for tasks that someone on your team does the same way each time. Examples are sending a standard acknowledgement, copying details from an email into a case record, or reminding people about a deadline.

Repeated work is easier to describe, easier to test and easier to improve than work that changes with every matter.

Check four things before you choose

Before you pick a task, ask four questions.

- ☐ Does it happen often enough to matter?
- ☐ Can you write the steps in plain language?
- ☐ Is a mistake easy to catch and cheap to fix?
- ☐ Can a person review the result before it is used?

What to leave for later

Leave work that depends on judgment for later. The same goes for any task whose steps your firm cannot yet describe.

Be careful with anything that touches sensitive client information until the firm and the people building the system agree how it will be handled.

AI can help with sorting, drafting and summarizing. A person always reviews the result before it is used.

Common first projects

- ☐ Client intake forms and follow-up
- ☐ Deadline and task reminders
- ☐ Moving information between the tools the firm already uses
- ☐ Drafting routine messages for a person to review

Based on our article: What a law firm should automate first, kallalaw.com/blog/what-to-automate-first

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