

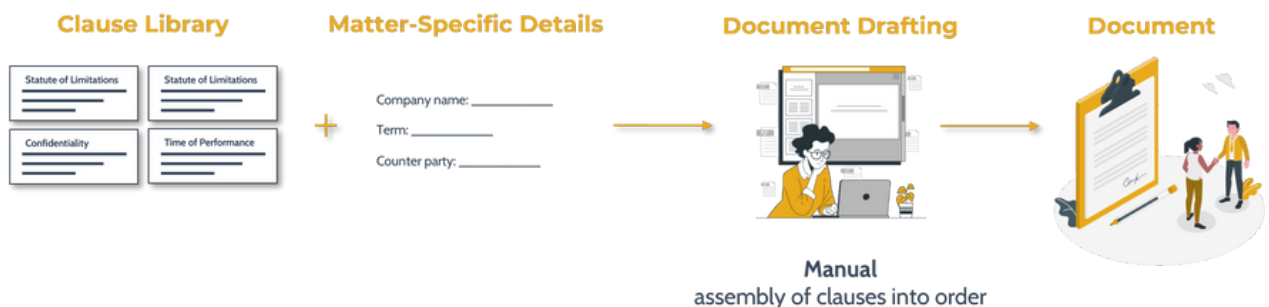
# Demystifying Document Drafting & Document Automation Tools



Legal professionals draft an inordinate amount of documents. Most lawyers take pride in their individual drafting styles and applying their minds to the crux of agreements or opinions. However, few enjoy the tedious task of manual data capturing, spending time on generic sections or searching emails and folders to find the right clause.

Legal professionals need efficient and streamlined processes for accurate document drafting - client needs are ever changing, while service is expected to be faster and more accurate. Fortunately, there are a variety of powerful tools and software solutions that can help fee-earners draft documents quickly and with the correct, most up-to-date clauses. From simple and force-fit to powerful and fully-tailorable, there's a document drafting solution for firms with a range of needs.

This article explores two of the core elements of drafting solutions – Document Drafting and Document Automation. Often confused or mislabelled, understanding the difference will drive better identification of your business needs and more effective vendor engagement.

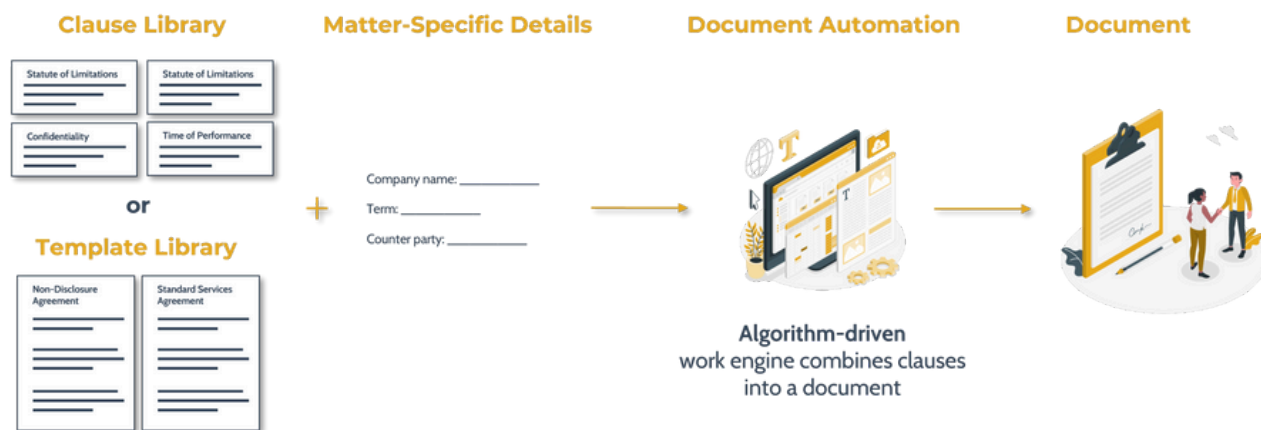


Document Drafting tools save drafting time and minimise risk by providing users with a library of clauses, sections or even entire precedents. Rather than starting a document from scratch or recycling an agreement from a previous client, fee-earners can assemble documents from this up-to-date library. The system will highlight fields that require user input (eg. client name, term, etc), allowing for adjustments to be made without forgetting anything important.

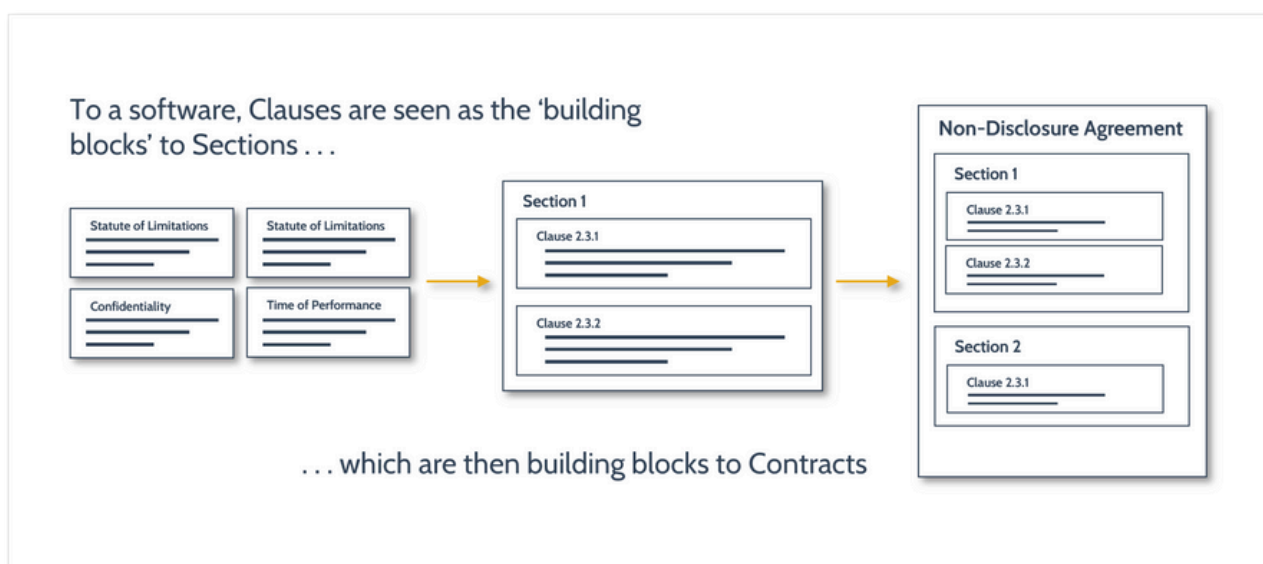


Authoring agreements using Document Drafting still requires some time investment from the fee-earner. However, the process ensures that only the most relevant and up-to-date clauses are used. More sophisticated systems can also track the use of certain clauses: so, if a particular clause is impacted by legislative change, all affected documents can quickly be identified. This empowers your firm to proactively reach out to the client and mitigate any further risk.

## Document Automation



Document Automation can be thought of as a “click-and-run” system. The system compiles the document with the relevant style template, clauses and content using information in your systems augmented with any additional details required from the user. Multiple documents can be created automatically within seconds. Manual data capture, searching for templates - or worse still, copying and pasting work from other clients’ - is eliminated. Document automation unlocks significant value in commoditised legal processes (e.g., conveyancing, leasing, etc). For more complex matters, document automation can be used to create good first drafts to work off - allowing lawyers to spend more time on the important aspects of the matter, and less on paper pushing.





Both document drafting and document automation tools rely on one key thing - a centralised repository, kept up to date by knowledge professionals. Clause management includes reusable examples of text and clauses. Precedent management requires knowledge administrators to build out commonly drafted agreements, and manage this repository to ensure the clauses within them are kept up-to-date.

The key to success for either of these solutions is having an up-to-date, centralised source of truth for clauses and sections (document drafting) or precedents (document automation as a stand-alone). Knowledge professionals are at the heart of any project to streamline document drafting practices. Their expertise is instrumental for effective clause management and template management.

- Clause management, sometimes referred to as 'precedent management', focuses on gathering and maintaining reusable examples of legislative text and clauses.
- Template management requires knowledge administrators to build out templates for commonly drafted agreements and manage this repository to ensure the clauses within them are kept up-to-date.

If your team members are still starting their drafting with folder searches, it's time to consider document assembly and document automation tools. Satisfy both clients and staff by cutting down on the time required for each deliverable, while still ensuring that documents are of the highest quality.

Co-Flo Enterprise has supported global law firms and corporations in their document drafting processes with our Document Automation and Precedent Library modules. To find out more and request a demo, email [sales@co-flo.com](mailto:sales@co-flo.com) or visit our website:

## About Co-Flo

Co Flo is a cloud-native suite of operations management applications for knowledge workers in corporate service groups such as Legal, Finance, Compliance Risk and HR , who create and work with sensitive, IP intensive, confidential or valuable content in documents and emails.

Co-Flo enables service centers like these to better understand their changing demand for services, current resources, the current state of all work in process, and automates many service functions leading to key operational insights, reduced cost and increased productivity and collaboration.

Co-Flo extends and enriches iManage platform functionality to fit the specific needs of Corporate Departments collaborating on high-value, content intensive work

## Contact Us

Website

[www.co-flo.com](http://www.co-flo.com)

Email

[sales@co-flo.com](mailto:sales@co-flo.com)

