Avvoka

The Ultimate Guide

Document *automation*

How to plan, build and roll out automated drafting that is fast, flawless and firm-grade.



Contents

Chapter One

Overview

What is document automation? 4

Where automation fits in legal tech today 6

Who uses document automation? 8

Which documents should you automate? 9

Chapter Two

Your automation project

Plan it: the Automation Canvas 14

Aims: know your why 17

Timelines: how long it really takes 19

Documents: what to automate first 20

Approvals: who signs it off 22

Stakeholders: who needs to be involved 23

IT: clearing the technical path 24

Rollout practicalities: getting your people ready 24

Implementation 26

Template consolidation 27

Automation 28

Integrations 32

Testing 33

Rollout and adoption 33

Choosing your technology 36

Why you should automate your own documents 37

Chapter Three

Appendices

Document automation: myth-busting 42

Glossary of key terms 45

Chapter One

Overview

In this chapter

4	What is document automation?
6	Where automation fits in legal tech today
8	Who uses document automation?
9	Which documents should you automate?

What is *document automation?*

This guide covers what document automation is, how to plan and run a project, and how it helps your team draft faster, stay accurate and get to “yes” sooner.



Document automation turns your approved documents into templates that draft themselves. A user answers a short questionnaire, or data flows in from another system, and the first draft is built from your own wording and rules.

Each template carries the logic an experienced drafter would apply: which clauses go in, which come out and how the text changes with every answer. Record it once and every draft follows it.

That is what sets it apart from a general AI assistant. An assistant writes something new each time you ask, so every output needs checking. An automated template is predictable and repeatable: the same answers give the same draft, in your firm’s voice. Many platforms also layer in workflow, so approvals and follow-on tasks are triggered when particular terms appear.

Why *automate?*

Automation is speed without compromise. Drafts arrive faster and come out right, every time. The benefits fall into two groups: functional and commercial.

Functional benefits

What changes in the day-to-day work of drafting

Speed

Speed is why most teams start. The provisions that may or may not belong in a document are decided ahead of time, so a draft takes minutes, not hours. No more square-bracket tinkering.

The best platforms also produce whole batches of similar documents, or an entire deal bundle, in one go. Invaluable on big transactions.

Consistency

Users edit only the fields you allow, with validation built in. Drafts built from rules carry fewer errors than drafts built from memory, and fewer errors mean less review.

No more re-keying

Most commercial documents reuse data from term sheets, spreadsheets or other systems. A well-built template pulls that data in automatically, so nobody types the same figure twice and nobody gets it wrong.

Data

Every automated document captures its key terms as structured data. The result is a living due diligence report: see what your clients are agreeing to, and what is becoming market, whenever you need to.

Audited approvals

Build your approval process into the template, and speed it up. If someone enters an unusually aggressive interest rate in a loan agreement, finance can be alerted automatically. Every document stays safe, compliant and auditable.

Commercial *benefits*

The functional gains add up to something bigger: more capacity, happier clients and a firm that scales its expertise.

The commercial case rests on four things:

01

More time for complex work

Hand the repetitive drafting to your templates and your lawyers get hours back for the high-value work clients actually pay for. Your organisation gets more efficient, and nobody is stuck on the same document twice.

02

Self-service for the business

Business users can produce routine documents themselves, quickly, safely and with a full audit trail. Legal steps in only when a draft goes off-piste. Less back-and-forth, faster deals and far less stressful lawyering.

03

A better client experience

Clients want work that is fast and right. Drafting from scratch, or copying and pasting from the last deal, makes that a hard balance to strike. Automation delivers both, at a fraction of the cost.

04

Rising client expectations, met

Clients now expect the same smooth, digital experience from their lawyers as from every other service they use. Give them a simple way to generate their own documents and they will keep coming back.

Where does automation fit in *legal tech today?*

Legal tech moves fast, and the last few years have added a whole new layer: AI assistants that draft, summarise and answer questions on demand. Working out what to use, and where, can feel overwhelming.

It helps to map the tools against the life of a document. Automation sits at the start, at creation, where it gives every matter a reliable first draft. AI assistants now appear at every stage.

01	**Creation**	Document automation · AI drafting assistants
02	**Internal review**	Document management · AI review tools
03	**Negotiation**	Contract management · Live collaboration
04	**Execution**	Deal management · E-signature
05	**Storage**	Document management systems · Repositories
06	**Obligation management**	Contract lifecycle management
07	**Contract analysis**	AI-assisted due diligence

Automation and AI assistants are not rivals. Automation gives you the predictable starting point, the assistant handles the bespoke parts and your lawyers make the judgement calls.

Who uses *document automation?*

Automation is not just for the largest law firms. Any team that drafts the same kinds of documents again and again can use it, in almost every sector.

Media

- Content acquisition agreements
- Content licences
- Subbing, dubbing and localisation
- Advertising sales agreements

Pharmaceuticals

- Manufacturing agreements
- Marketing authorisation agreements
- Patent assignments
- Quality assurance agreements

Law firms

- Facility agreements
- Share purchase agreements
- Employment agreements
- Legal opinions

Real estate

- Lease agreements
- Variation agreements
- Licences to occupy
- Rent deposit deeds

Private equity

- Non-disclosure agreements
- Term sheets
- Intra-group loan agreements

Finance

- Loan agreements
- Security documents
- Corporate authorities

Professional services

- Engagement letters
- Due diligence forms
- Non-disclosure agreements

Software

- Service level agreements
- Statements of work
- Distribution agreements

Logistics & supply chain

- Account opening forms
- Master service agreements
- Supplier codes of conduct

Use cases across sectors

Whatever the sector, these are the ways teams put automation to work:

Automated forms and PDFs

Sales automation

Deal-based automation

Document bundles

Precedent automation

CRM integrations

Approval workflows

Mass document generation

Which documents *should you automate?*

You could automate almost anything. That does not mean you should. The documents that pay back fastest are used often and need some tailoring every time.

Look for these five signals:

01 **Volume**

You draft it from a precedent more than once a week.

02 **Optionality**

It is full of square brackets and alternatives, especially if junior lawyers have to choose between them safely.

03 **Copy and paste**

Someone keys in data from another source. Connect the template to that source and the errors disappear.

04 **Approvals**

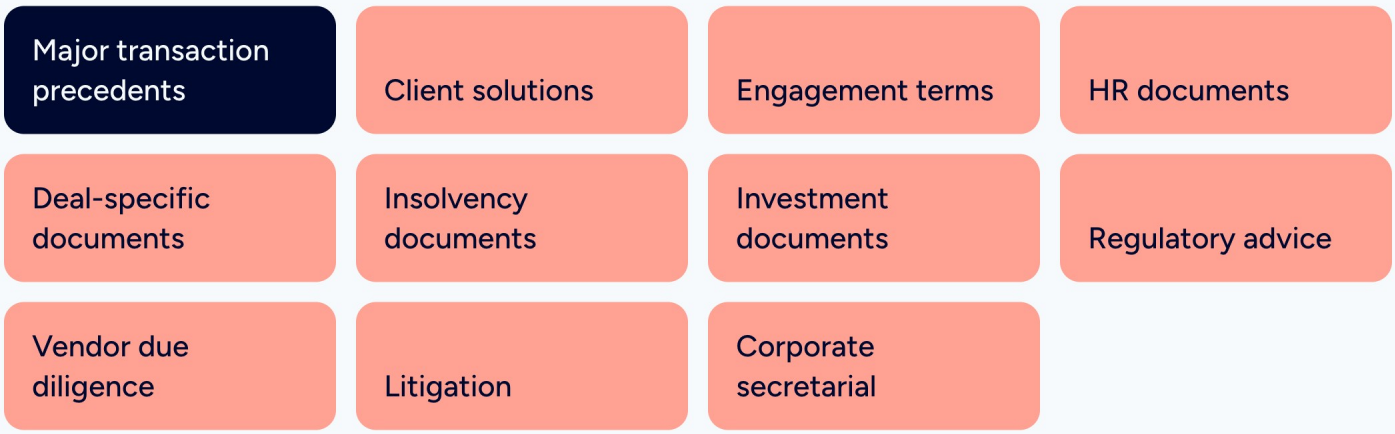
It needs sign-off on financial or risk terms. Structured inputs make every approval auditable and benchmarked.

05 **Data**

You review its key terms regularly. Automation turns those terms into a reliable source of business information.

Like any exam, the more ticks, the better. Run your documents through the checklist and see which ones earn their place.

Beyond the *core precedents*



The big transactional precedents get the attention, but 'non-core' documents often tick more of the boxes on the previous page. There is real return across the whole spectrum of ancillary work.

Four strong candidates, thanks to their repetitive, structured nature:

01 **Intra-group agreements**

SPAs, asset transfers, assignments and novations

02 **Company secretarial**

Board minutes, shareholder resolutions and notices of meetings

03 **HR documents**

Employment agreements, notices of transfer, termination and option agreements

04 **IP transfer documents**

Licence and franchise agreements

You probably draft these far more often than the headline precedents.

They are needed in bulk and reproduced by hand on deal after deal. They may not be revenue-generating heroes, but automating them frees up hours across the firm and makes the whole process simpler.

Beyond documents: *forms*

Why stop at documents? Modern platforms also automate the procedural forms your business completes every week.

The time saving is only the start. Data captured in a form can flow straight into another system, and approval workflows can sit on top of it, so financial sign-offs are triaged automatically.

A few forms that are well within reach of today's tools:

01 KYC documentation, information security and vendor due diligence forms

02 New account opening forms

03 Multi-jurisdictional questionnaires for gathering local counsel advice on large matters

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Agree your aims at the start and they will guide every decision that follows.



Chapter Two

Your automation project

In this chapter

14 Plan it: the Automation Canvas

26 Implementation

36 Choosing your technology

Plan your project

The Automation Canvas

An ideas board for the whole project. Work through the seven boxes with your team before you commit to anything. Each box matches a section in this chapter.

01 Aims

02 Timeline

03 Documents

Users	Volume	Time	Complexity

04 Approvals

05 Stakeholders

06 IT

07 Rollout practicalities

Your road to *automation*

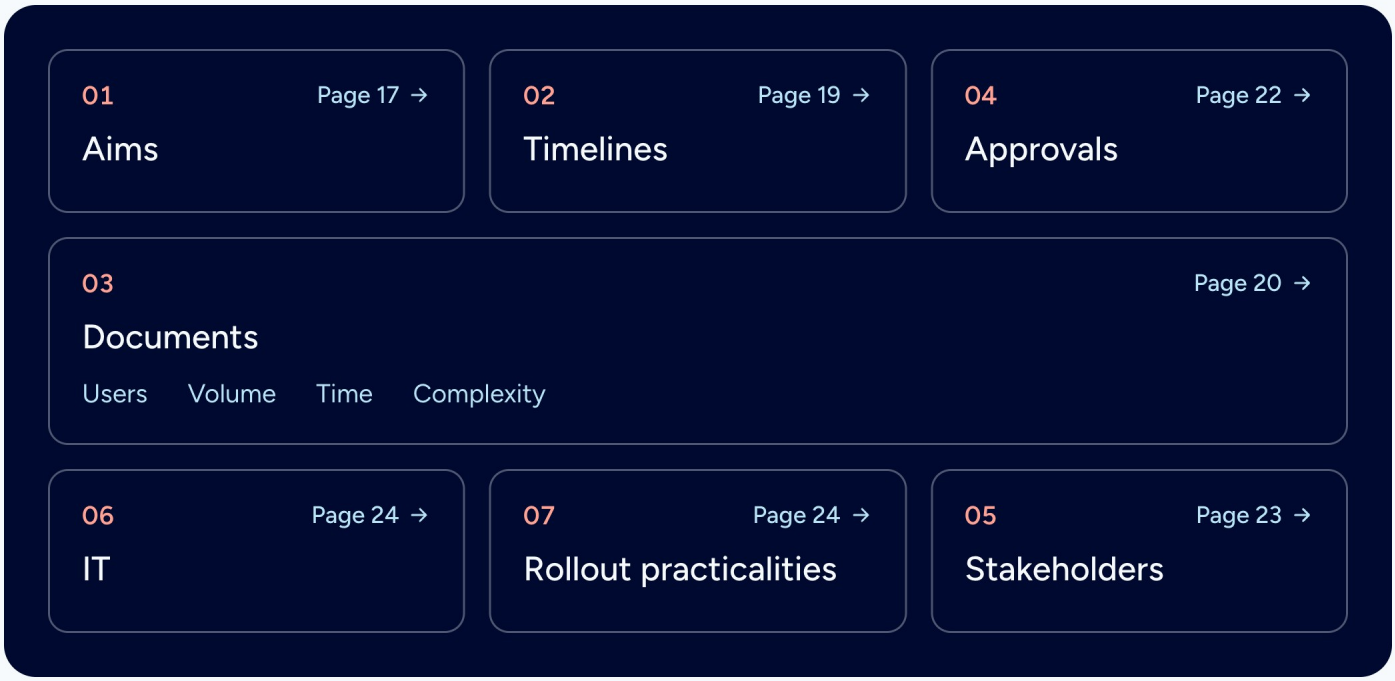
You know what automation is and why it matters. The next question is how to make it happen in your organisation, and that starts with a plan.

We created the Automation Canvas to help. You will find it on the previous two pages, or you can download a copy to fill in with your team.

View the Automation Canvas

The Canvas is not a project plan. Think of it as an ideas board: one page where you work through the whole project, and the challenges ahead, before you commit to anything. It has seven sections.

The seven sections:



01 — Aims

Your overall aim is simple: a tool that fits how your organisation already works and gives your team time back for higher-value work. Beneath that, you need a clear **why**. It is what will win approval for the project.

> *"A successful tool saves you time. It should never cost you time once it is live."*
>
> **David and Eliot, Avvoka co-founders**

Look for a solution that fits your existing workflow and is genuinely easy to use. If it does not connect with the tools your lawyers rely on every day, adoption becomes an uphill battle.

Then define **what** you want from it. Do you need an end-to-end platform that takes a document from first draft to signature, or is drafting the priority? Some platforms add negotiation, analytics or the ability to draft from inside the AI assistants your lawyers already use. Know which of these matter before you compare vendors.

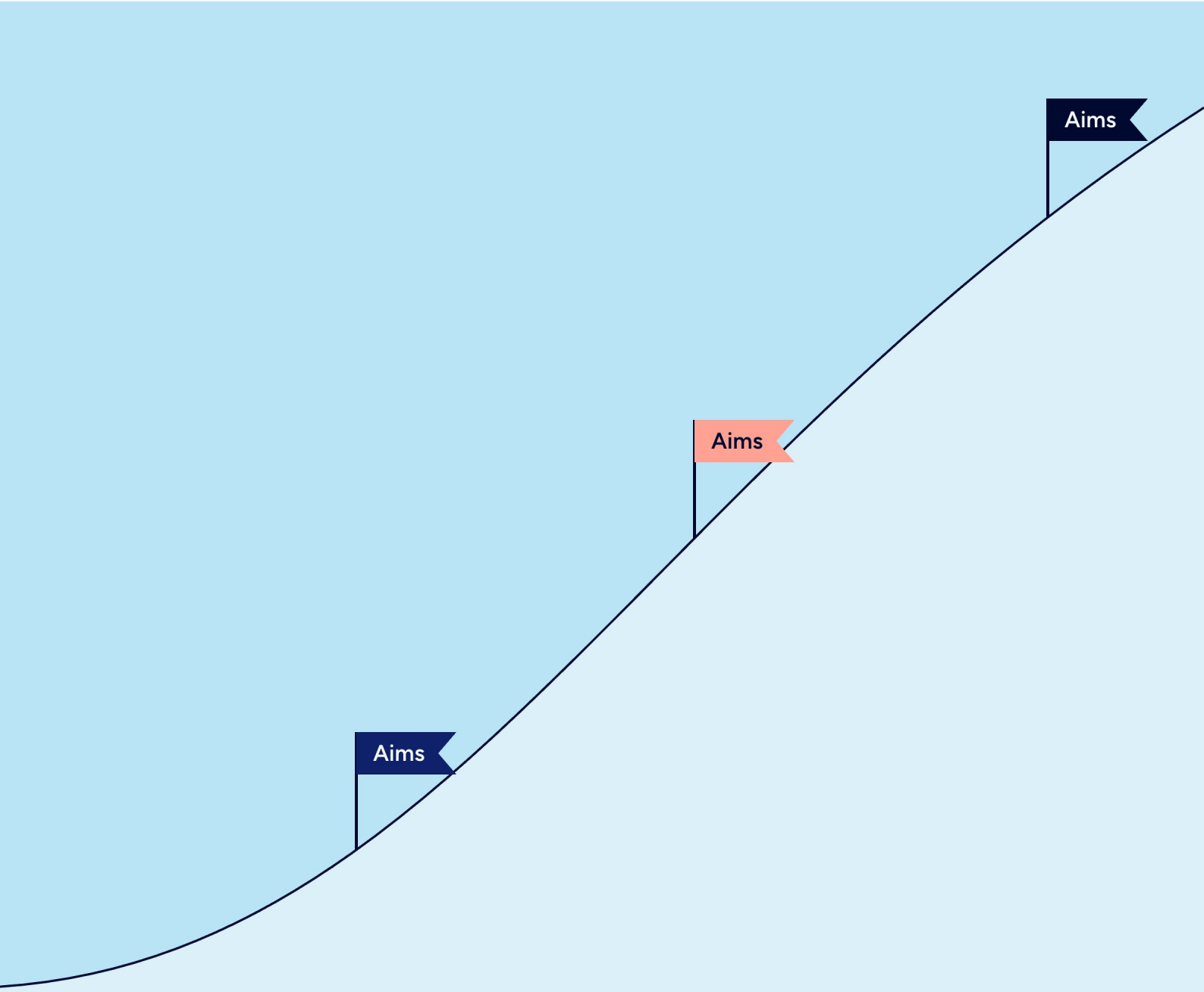
Finally, set out what success looks like. Automation cuts first-draft errors, from small typos to inconsistent defined terms. Naming the outcomes you expect gives you goals you can measure.

Automation removes those errors at the source. Checks sit inside the questionnaire, and one answer fills every place that data point appears in the document.

Look for wider efficiency gains too. Map the slow parts of your current workflow, then decide exactly where the new tool will remove them.

Data can be an aim in its own right. If tracking negotiation trends and push-back matters to you, it will narrow your choice of tool and tell you which documents to automate first, so the insight arrives early.

Agree your aims at the start and they will guide every decision that follows, from which tool you choose to how you test it. Share them with your vendor so the project is built around them.



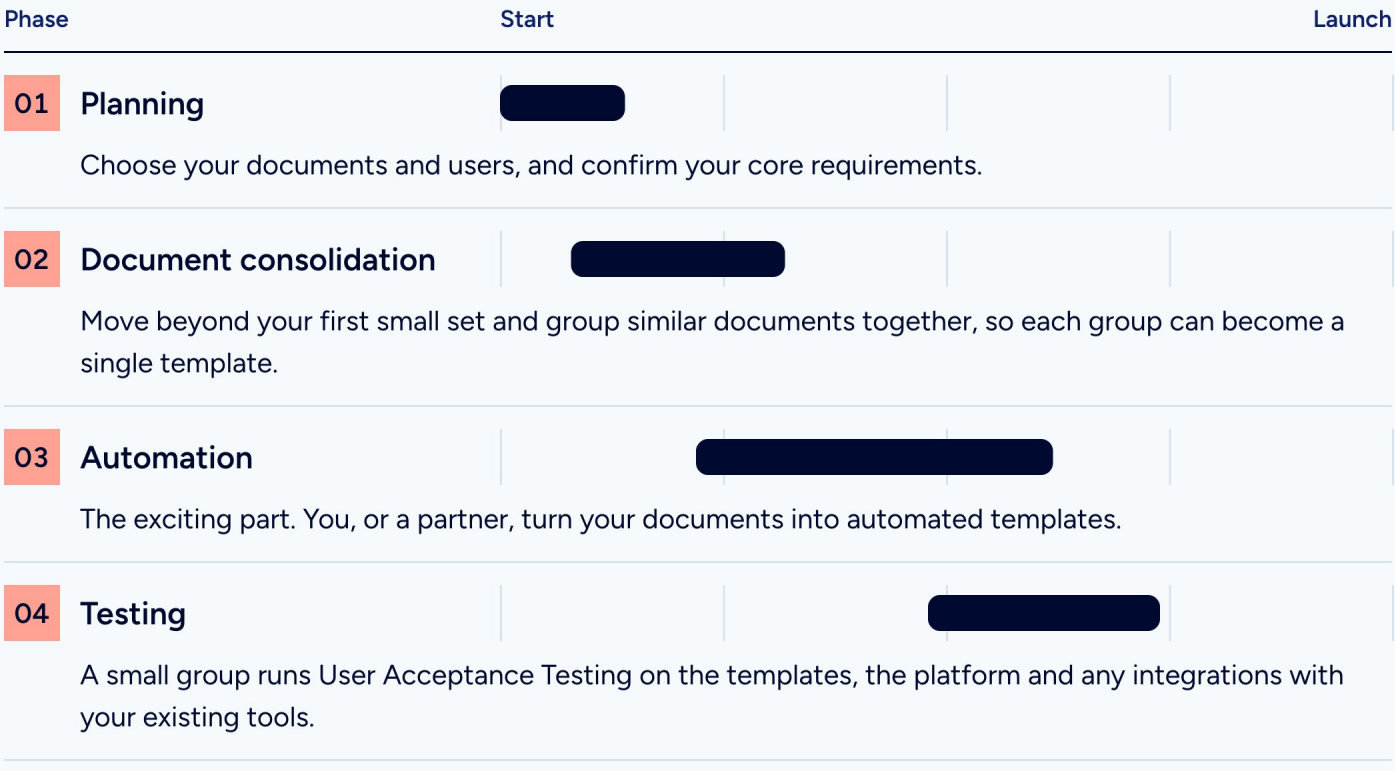
02 — Timelines

Timing is the hardest question to answer accurately. Projects run anywhere from two months to two years, depending on three things:

- → **How many documents you are automating**
- → **How complex they are**
- → **How ready they are for automation**

We break every project into stages, usually starting with a pilot: a small group of users who test the approach before anyone else sees it.

A typical project runs like this:



Illustrative only. Phases overlap, and a whole project can take anywhere from two months to two years.

Phase	Start	Launch
05 **Training**		
Prepare to take ownership. At least one person on your team should know the platform well enough to train everyone else.		
06 **Pilot (optional)**		
Agree the length of the pilot with your provider. Give pilot users enough time to get comfortable and give useful feedback, so you know the platform is right for you.		
07 **Launch**		
The official handover: the platform is yours. Launch it by business unit or by document group, whichever suits your organisation.		

03 — Documents

What should you automate first?

Most documents are ripe for automation, but they are not all equal. Picking the right ones at the start sets the tone for the whole project.

Score every candidate in **three areas: volume, complexity and readiness.** Use the scorecard on the next page to compare them side by side.

For example: a complex agreement

4 hours
Drafting by hand

→ ***5 minutes***
From an automated template

Score your *candidates*

Score each area from 1 (weak) to 5 (strong) for every document on your shortlist. Photocopy this page, or recreate it in a spreadsheet, and compare the totals.

Document *scorecard*

Document _____

Area	What to look for	Score 1 to 5
01 **Volume**	The documents you create most often usually benefit most. A small saving on each one, multiplied across hundreds, adds up to real return. They are the natural place to start.	1 2 3 4 5 Weak Strong
02 **Complexity**	Complexity cuts both ways. Complex documents take longer to break down into automation instructions, and longer to build. They also take longest to draft by hand. That makes them the showpiece of any project: a four-hour drafting job reduced to five minutes.	1 2 3 4 5 Weak Strong
03 **Readiness**	Every project needs early wins. If a contract has already been rationalised, and its drafting instructions exist or could be written quickly, move it up the list. A handful of templates delivered early buys you the time, and the confidence, to tackle the larger documents.	1 2 3 4 5 Weak Strong
Total	The higher the total, the stronger the case for automating it first.	____ / 15

Steer clear of documents used only in rare, particular circumstances. They seldom repay the effort. But if you have several versions of a document that differ only in places, automation lets you consolidate them into one.

Look at where your colleagues spend the most time. That is where your tool will deliver its full value.

04 — Approvals

Get the project signed off by the right people.

Ask colleagues early which approvals you will need. Every organisation is different, but most projects need three:

Budget

Usually from the budget holder or head of finance. Be clear on the aims, the expected return and the timeline.

Information security

If you have an in-house security team, they will need to confirm the platform is safe to use.

IT

This overlaps with security. IT will want to know the platform fits with everything else you already run.

05 — Stakeholders

Stakeholders include the decision-makers above, but the circle is wider: anyone affected by the project, or with an interest in how it lands.

Who they are depends on your organisation, and on whether the project is legal or commercial. Most projects involve some of these people:

End users	The people who will use the tool every day. They will worry about how it changes their role and disrupts their workflow. Show them the time it saves, and be clear that it supports their expertise rather than replacing it.
Project manager	Is this you? The person who sets the budget, timeline and scope. They are the link to the vendor, so they need to keep every other stakeholder informed and deal with concerns quickly.
Finance or budget holder	They hold the purse strings. Show them the project is a sound return on investment.
IT director	Responsible for your technology. Reassure them on the need, the use cases specific to your organisation and the long-term savings. Your vendor should give you the documentation to make that case.
Internal communications	They help the rollout land. Keep them involved at every stage, especially in the run-up to launch. They will shape opinion and bring people with you.
Legal sponsor	For law firms and in-house teams: a senior lawyer who champions the project. They open doors to practice groups, drive adoption in their own teams and make sure legal feedback shapes how each document is automated. Involve them early.
Commercial sponsor	For in-house projects: someone from each part of the business that will use the tool. It has to work for everyone. A tool the lawyers love and the business ignores, or the other way round, is not a success.

Bring the key people in early, and keep them informed all the way through.

06 — IT

Expect a few IT hurdles. Every one of them can be cleared. Share your key technical concerns with IT at the planning stage, so they are ready to help if those concerns come true.

Prepare your users for the odd hiccup too. Some will be working remotely on slow connections, behind a VPN or on a browser the platform does not support. Plan for it now and nobody is caught out.

The best defence is a plan. Keep one guide, yours or your vendor's, that lists every IT requirement, so users are ready from day one. Make sure every user has:

- → **The right browser installed**
- → **A clear picture of how the platform fits their day-to-day work**
- → **Given the project everything it needs from them**

Expect some things to go wrong. Technology has a habit of doing the opposite of what you want. Set expectations that the early days will not be seamless, and interruptions become easy to handle.

Know what support your vendor offers and how to reach it. If you are building on an open-source tool yourself, work out now who will answer your questions.

07 — Rollout practicalities

Line up your testers and pilot users, matched to the documents you have chosen. Keep your internal communications team up to date so they know when each piece has to land.

Be clear on your own responsibilities too. Agree feedback deadlines with your vendor and make sure every stakeholder knows the timeline.

Keep your vendor informed about any changes to your requirements, and any integrations your work depends on.

> *Our biggest tip: keep an open line to your contacts at your vendor. Clear communication and clear aims set the project up to succeed from day one.*

Budget *approval*

Automation costs far less than it once did, thanks to self-service technology. You will still need budget sign-off before you start.

Build a strong business case around four points:

01 **Identify the problem**

Start with the pain. Which documents take too long, which are error-prone, and which do you need more visibility over?

02 **Measure it**

How long does drafting take today? How often do errors happen? How long does reporting take? If you don't have the data, start tracking it now. Rough estimates are fine.

03 **Choose the right documents**

Start with quick wins: documents that are ready to automate, used in high volume and tailored every time. We like to begin a step up from an NDA, with terms of business, engagement letters or licence agreements.

04 **Estimate the return**

Compare today's numbers with what you expect after automation. Then compare the cost of doing nothing with the cost of the solution. If it costs £2,000 and saves £200,000, the decision makes itself.

Implementation

Every automation project runs through the same five stages, plus the groundwork that comes first. Click a stage to jump to it.

The road to implementation

00 **Budget**
Before you start: build the business case
Page 25 →

01 **Template consolidation**
Tidy your templates, ready for automation
Page 27 →

02 **Automation**
Apply the logic to your templates
Page 28 →

03 **Integration**
Connect to the tools you already use
Page 32 →

04 **Testing**
Test, test and test again
Page 33 →

05 **Rollout**
Launch, then drive adoption
Page 33 →

01 — Template *consolidation*

You have chosen your documents and your strategy. You open your template bank and find twelve versions of the employment agreement. Now comes one of the most common questions in automation: keep them separate, or merge them?

Merging is known as template consolidation, or rationalisation. You take every version of 'Agreement X' and reduce them to the smallest number that makes sense.

Consolidate wherever you can. That does not mean merging your employment agreement with your termination letter. It means keeping similar documents in one template, automated so the user is guided to the right result every time.

A good rule of thumb: if documents share around two-thirds of their provisions, or could after a redraft, they belong together. Avvoka Curate can help here, turning your firm's best existing documents into governed templates.

A practical example. My folder holds these templates:

- Hong Kong Employment Agreement: basic
- Employment Agreement: with probation period and share scheme
- Consultancy Agreement
- Employment Agreement: with bonus scheme
- Employment Agreement: standard

→

One master template

Employment Agreement

If they share standard clauses and cover the same ground, they become one master Employment Agreement, with optional provisions that drop in as needed.

02 — Automation

Now the fun part. How you start depends on your platform, but a few principles hold for every tool.

Plan

One by one, all at once, or in groups?

Once you know which documents to template, choose your strategy. Spend three months building and release everything together? Or focus on one contract type at a time?

Or somewhere in between? There is no single right answer. It depends on what is driving the project and which templates you have chosen. In our experience, delivering in groups works best.

One by one

Positives

The whole team focuses on a single template, so quality is high and delivery is quick. Ideal when one flagship contract is urgently needed.

You also spot problems in your approach early, and carry the lessons into every template that follows.

Negatives

Different contracts often belong to different legal and business teams. Focusing on one can leave the others idle, and lose their interest if it takes too long.

All at once

Positives

Every bit of energy goes into templating, rather than juggling rollout and training on some templates while automating others. You know exactly when your legal and business teams are needed, and for how long, before the handover. And the whole business can be trained at the same time.

Negatives

It is the riskiest approach. Find a problem at go-live and you have to fix it in every template. A simple error can take weeks or months to correct across the set.

In groups

Positives

The best of both worlds. You deliver a handful of contracts at a time, ideally similar types or from one business area. Lessons transfer easily between documents, and you can roll out to one unit first for User Acceptance Testing before the wider launch.

Negatives

You can end up too focused on one area, and you will be running several workstreams at once: templating here, rolling out there, training somewhere else.

In what order should you *automate your documents?*

You have your templates and your approach. One decision remains: which to tackle first. We recommend starting with a group of three or four.

Weigh up three things:

Readiness	Early wins build momentum. Contracts that have already been rationalised, with drafting instructions in place or easy to write, deserve serious consideration. Delivering a few templates quickly buys you the time and confidence to take on the larger documents.
User group	How many people will use each template? The NDA is the classic first choice, but the whole business uses it, so you will need to train and roll out to everyone at once. That can work in your favour: early success with the NDA builds engagement across the organisation while each area's core documents are automated. If you need buy-in from several groups, make sure your first documents are not confined to one business area. NDAs and simple commercial contracts, such as assignments, are good options. Or start with one enthusiastic team, automate everything they use and iron out early issues before moving to tougher parts of the firm. A perfectly valid strategy too.
Complexity	The ideal first group is mostly simple contracts, plus at least one that is more complex. Get the simple ones working fast for quick wins. There will always be sceptics who want to see something more impressive. Two or three simple documents and one of medium complexity is the right blend.

How much should *you automate?*

How much of each document should you automate? It is tempting to build the perfect template, with every word and option automated. That occasionally works. Usually it produces templates that are slow to build and hard to maintain.

60% *Start small, keep it simple, automate 60% of the document, then iterate.*

You will be surprised how much time five to ten well-chosen questions can save, when each one drops whole sections of the document into place.

For every section, weigh the effort of automating it against doing it by hand. Recitals are a good example: among the fiddliest parts to automate, and often quicker just to type.

Think about the end user

Keep in mind who will answer the questions. The commercial team? New joiners? Lawyers only? Write every question so it makes sense to that person.

Nothing brings inefficiency back into an automated process like an ambiguous question.

Even something this simple can be asked two ways:

Which law governs the contract?

- ○ English law
- ○ New York law
- ○ French law

Where is the deal team based?

- ○ London
- ○ New York
- ○ Paris

Both questions change the jurisdiction clause. They are simply phrased for different audiences.

Standardise your data points

Before you automate, find the data points that repeat across a document and standardise them.

Why does it matter? You avoid writing several questions for the same piece of information, and the user experience improves dramatically. Automation is meant to save your users time. Nobody wants to answer fifty questions when five would do.

What does that look like? Early in a document, the company name becomes a placeholder the user types in. You create a `[company name]` attribute.

Later, you find square brackets around `[full company name]` and create a second placeholder. Now the user has to answer two questions for what is really one piece of information.

Standardising avoids that repetition and keeps every draft accurate. Before you start, list the data that repeats and give each placeholder one standard name.

With practice, you will learn the data points in your documents, condense your questionnaires and end up with a few questions that drive the whole document.

03 — Integrations

The integrations you need depend on the software you already use, and how you plan to roll out automation.

Common examples: pulling data from existing systems into your questionnaires, sending completed data to your CRM and connecting to your e-signature platform. Increasingly, it also means drafting from your templates inside the AI assistants your lawyers already use, without switching tools.

Two questions will shape which integrations you build:

What do you already use? If a CRM runs across your organisation, connect it. A platform that fits the software you already run saves people time instead of adding work.

What do you want from the platform? Extra insight from AI? One seamless workflow instead of hopping between tools? Your answers decide which integrations you need.

Once you know, ask your vendor three things:

- → **Do you support the integrations we need?**
  A deal-breaker. If a provider can't connect to your essential tools, look elsewhere.
- → **How do you test them?**
  Make sure every integration is proven to work before the project is signed off.
- → **How will it work day to day?**
  Ask plenty of questions and have the vendor walk you through it, so there are no surprises later.

04 — Testing

You are nearly there. Your documents are automated and ready to change how you work. One crucial step remains.

Testing is not something you do alone. Involve the people who will use the templates every day, and cover two essentials:

A variety of users. Pick testers across levels of seniority, roles and comfort with technology.

Recent deals, repeated. Re-run your last real matter through the new template and see how much it would have helped.

05 — Rollout

How you roll out depends on the scale of your project. Two things make it smoother:

Communicate early. Send emails and hold briefings so people understand the project and the timeline.

Start with a pilot group. However thorough your testing, a few things will slip through. A pilot catches them before everyone else does.

5.1 Adoption

Adoption is the hardest part of any project, and the most important. Getting people to embrace new technology, rather than quietly drop it, takes work. These are the practices we have seen work best for firms that want their people engaged, confident and getting full value from the tool.

Our top ten tips for adoption:

01

Make it fit

Does the new platform work well with the rest of your technology stack?

Technology is adopted fastest when it plugs into what people already use, whether that is your CRM, your document management system or your AI assistant.

02

Training, training, training

A strong onboarding plan is vital. Introduce the platform to different parts of the business in waves, and tailor it: don't drown the sales team in technical detail, and don't skim over it with the lawyers.

Build sessions around the journey you want users to take. Practical webinars and online classrooms work well.

03

Listen to your end users

Early roundtables with practice groups, business users and departments make change far easier to manage. When people feel consulted from day one on a project they will ultimately own, the whole organisation benefits.

04

Content is king

Create guidance that suits different ways of learning. In our experience, short one-pagers and narrated how-to videos work best, and a free screen-recording tool makes quick training videos easy to produce.

05

Build a network of champions

Champions are super-users in each business unit who know the platform inside out. They give colleagues someone close by to turn to with questions and concerns.

06

Set success criteria early

How much faster must the platform be than your manual process? If those measures are not written down, you cannot tell how well it is doing.

Nothing persuades like benchmarks. Visible proof makes others want to use the tool you have chosen. Success breeds success.

07

Set clear objectives and milestones

Work expands to fill the time available. Firm, practical deadlines make people set time aside to try something new, and they are essential during a pilot or proof of concept.

Other projects will always compete for attention. Protect the time your team needs to test properly before you decide.

08

Track and follow up

Metrics show how the project is going and strengthen your business case. Does your platform have a dashboard that shows who is using it, and who is not?

Tracking engagement is not about pointing fingers. It helps you spot people who are struggling. Follow-up sessions and drop-in clinics give them a second, safer chance to get to grips with the tool.

09

Reward your users

Great experiences turn users into advocates. Recognise early adopters to encourage the rest: firm-wide shout-outs, more responsibility for the junior lawyers who lead the way, and hall-of-fame schemes that celebrate personal wins.

10

Remove barriers fast

Resistance will appear. Deal with it early, during the pilot or feedback phase. Do some users need more targeted training? Should you check in with each business unit regularly? Who needs to be reassured, convinced or involved? Keep asking these questions until adoption is where you want it.

5.2 Continuous improvement

Your platform is live and people across the business are using it. Now the job is to keep it improving. Three habits will help you get the most from your investment.

Keep your finger on the pulse. Regular catch-ups with users and their managers tell you how people feel about the technology, where the bottlenecks are and whether the process needs to change.

Stay up to date. Technology moves quickly. Keep track of new releases and keep checking what the platform offers against what your organisation needs.

Implement and iterate. Use what you learn to make targeted changes, clear bottlenecks and keep adapting your process as your needs shift.

Choosing your *technology*

We won't tell you which platform to choose. We are a little biased. Instead, here are the questions to ask your vendors, and yourselves.

How easy is it to automate a document? The most important question. Every vendor will say 'easy' or 'no-code', and both can be misleading. The easier the tool, the more people learn to automate, and the more documents you end up automating.

Even if you outsource the build, you will need to make quick changes yourself. Ask to try the platform, and have the vendor add automation on screen in a live demo. If they won't, it is probably too hard to use.

Live *demo*

See Avvoka automate a document on screen, and ask us anything.

Book a demo →

Features. Every platform differs, but you will almost certainly need these:

- → **Loops**
  Add answers dynamically, such as the name of every director.
- → **Formatting**
  Custom numbering, tables, headers, footers and more.
- → **Calculations**
  Excel-style functions: change the case of an answer, turn numbers into words, format dates.

Integrations. The platform must fit your existing processes. Even if you need none today, you will as your stack grows. Check for a modern API and ask for real examples, such as pre-filling a questionnaire from another system.

AI. Ask how the platform works with AI. Can your lawyers draft from your approved templates inside the AI assistants they already use? Is every draft predictable and repeatable, built from your firm's own wording?

Costs. Ask about extras such as support or maintenance fees, and whether you pay a fixed price or by usage.

Hosting. Will the platform be hosted in the cloud, or installed on your own servers?

Why you should *automate your own documents*

Who will actually automate your documents? You have two choices:

01

Outsource it to your vendor or a consultant

02

Learn to automate yourself

01 · Outsourcing

Positives

Fast start. An external specialist already knows their tool and can begin as soon as your documents are ready.

Negatives

Expensive. Day rates can reach £1,000, and long documents can cost tens of thousands to automate.

Slow to change. Spot a typo, or face a change in the law, and you join a queue and pay again.

You still do the thinking. Nobody can automate a document without you. You still decide the questions and the approach, and you review the result. Think of an external automator as a builder: they build the house, but you provide the design.

02 · Learning to automate

Positives

Cost-efficient. Most platforms charge per user or licence, so once you know how, you can build as many templates as you like for the same price.

Knowledge stays in-house. The know-how behind every template stays inside your organisation.

More use cases. Explore automation wherever it helps, without justifying an external bill each time.

Quick changes. Fix a typo or update your wording in ten minutes, not weeks.

Negatives

It takes time to learn. Even the most intuitive tools take a few hours to understand.

Slower first results. Your first few documents will take longer than outsourcing them would.

Our *recommendation*

Learn to automate yourself.

You will **save money**, **make changes quickly** and **spread the knowledge** across your organisation. Your first few templates take a little longer. Every one after that is faster, and entirely yours.

See Avvoka *in action*

Take the virtual walkthrough and see how templates are built, drafted and signed, at your own pace.

Start the walkthrough →

avvoka.com/walkthroughs

Avvoka

Start small, keep it simple, automate 60% of the document, then iterate.



Chapter Three

Appendices

In this chapter

42 Document automation: myth-busting

45 Glossary of key terms

Document automation: *myth-busting*

If automation is this useful, why isn't everyone doing it? Usually, a few stubborn misconceptions.

Myth I need to know how to code.

Truth *You don't need to write a single line of code.*

Older tools made coding a requirement. Modern platforms let you automate visually, as easily as highlighting text.

Myth Automating will take longer than it saves.

Truth *Automating your own documents saves time, and keeps on saving it.*

With legacy tools, automation could be a slog: finding someone to outsource to, writing instructions, reviewing the result or learning to code yourself. Modern no-code platforms remove most of that.

Once a document is automated, all anyone has to do is answer a questionnaire. The hours you used to spend drafting are yours again.

Myth My documents aren't suitable.

Truth *Almost any document can be automated.*

From a standard form contract to a complex share purchase agreement, almost anything can be automated. Some documents take more work than others, so start with the ones that have the most customisable terms.

Myth I'll have to answer too many questions.

Truth *The number of questions depends on how you build the template.*

Complex documents may need more questions, but the trend is towards broader questions that each do more work. Fewer questions mean faster drafts.

Myth It will cost too much.

Truth *The costs are easy to manage.*

Plans can usually be tailored to your needs and your number of users. Automating documents yourself is one of the best ways to control costs, and no-code tools make that far less daunting.

Myth Training will take too long.

Truth *Modern platforms are built to be picked up quickly.*

Intuitive interfaces mean users become proficient fast, and most providers include training as part of the subscription.

Myth The cloud isn't secure.

Truth *Your contracts may be safer in the cloud than on local systems.*

Much of your data is already there: email providers store every draft you send on their servers. Leading platforms offer bank-grade security on tested, certified infrastructure.

Myth

I'll lose control of my documents.

Truth

Automation gives you more control, not less.

Your documents stay fully accessible, and modern platforms add controls of their own, such as automatic alerts when a document needs signing.

Myth

Automation can't handle our complex documents.

Truth

Complex documents, and whole bundles of them, are well within reach.

Some systems only handle short, simple documents. The most capable platforms automate the most complex agreements, and entire deal bundles at once. Test that power when you compare your options.

Myth

AI assistants make automation unnecessary.

Truth

AI and automation do different jobs, and work best together.

An AI assistant writes a new draft every time you ask, so every output needs checking. Automation builds the first draft from your firm's approved wording and rules, so it is predictable and repeatable. Use automation for the reliable starting point, the assistant for the bespoke parts and your lawyers for the judgement calls.

Glossary of *key terms*

Every industry has its jargon, and legal tech has plenty. We are guilty of it too, so here is a quick guide to the terms you will hear most.

AI assistant	A general-purpose AI tool that drafts, summarises or answers questions on request. Each output is generated fresh, so it needs checking.
API	Application Programming Interface. The set of commands two systems use to talk to each other and exchange data.
Attribute	The name for a data point in a template. ‘Company Name’, for example, holds the answer to ‘Please provide your company name’. • An attribute can drop an answer straight into the document, such as the company’s name. • Or it can act as a condition that decides whether a whole clause appears.
Cloud-hosted	Software that runs on a provider’s servers and is accessed over the internet, rather than installed on your own.
Conditions	Rules that make a block of text appear only when a criterion is met, usually triggered by the answer to a questionnaire item.
Document management system	Software for storing, tracking and managing electronic documents.

Drafting infrastructure	The layer that holds a firm's approved wording and drafting rules, and builds first drafts from them wherever its lawyers work.
End user	The person who answers the questionnaire and generates the automated document.
E-signature	Electronic evidence of agreement to a document, the digital equivalent of signing with a pen. Not the same as a digital signature.
Headless drafting	Calling your firm's automated templates from inside another tool, such as an AI assistant, so lawyers draft from approved wording without switching platforms.
Hosting	Where software runs: on a provider's servers or your own, accessed over a network.
Integration	A connection that lets two systems work as one.
Legal technology	Software and technology that supports legal work and the legal industry.
Placeholder	A marked input field in a document. Creating one creates an attribute and a matching question, and the answer fills the placeholder.
Questionnaire	The set of questions that captures the bespoke details needed to tailor an automated document.
SSO	Single sign-on. One set of login details gives access to several applications, such as using your work login for a third-party tool.
Template	A document set up to take bespoke information from a questionnaire, which the platform inserts automatically.

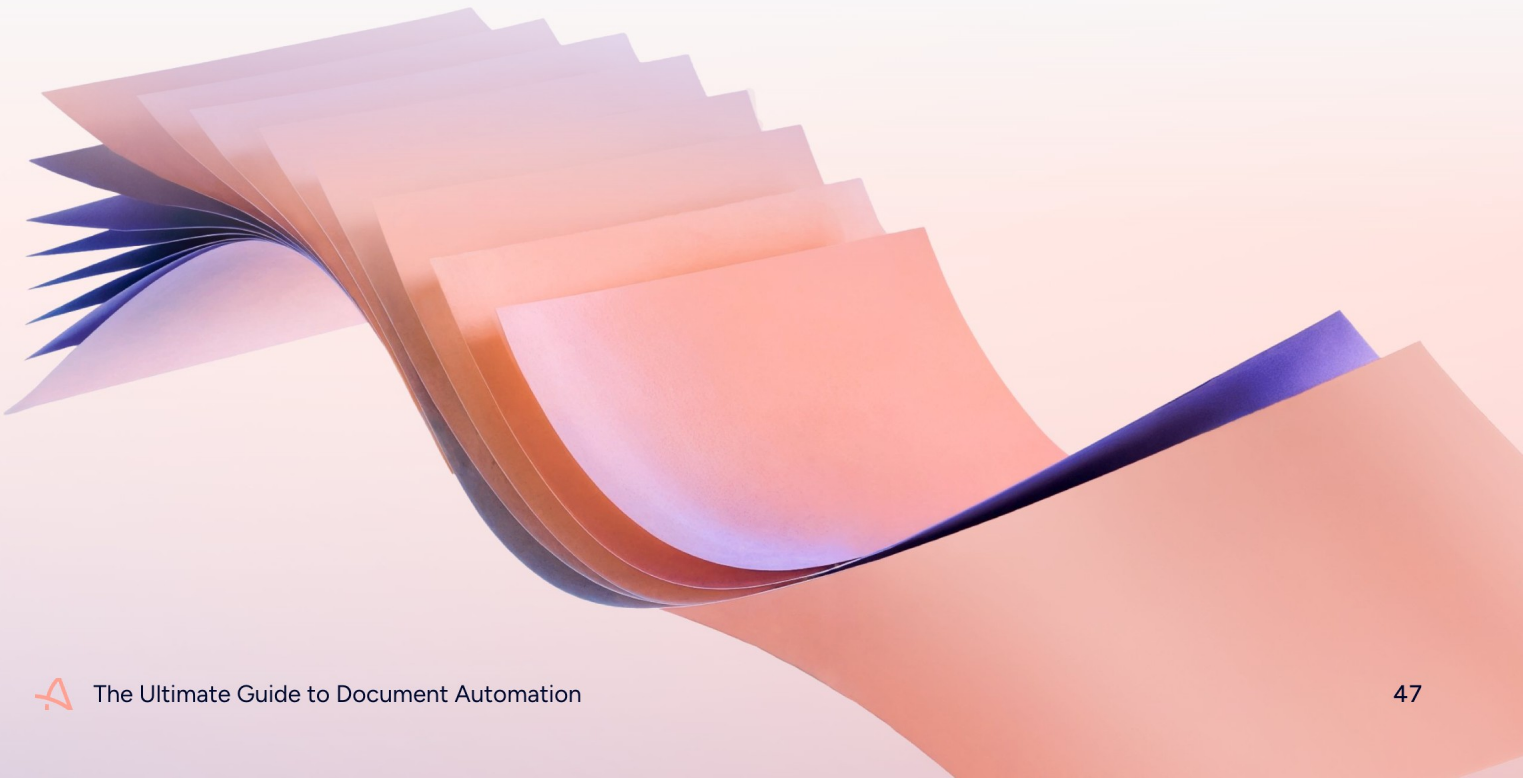
Templating	Turning a standard precedent into an automated template by adding automation instructions.
The cloud	Networks of servers in data centres around the world that run software and store data, delivered to you over the internet. No fluffy white objects involved.
Variable	Another name for an attribute.

Ready to see it *in action?*

Book a live demo with our team, or explore Avvoka at your own pace with the virtual walkthrough.

Book a demo →

Take the virtual walkthrough →



Avvoka

Fast, flawless, *firm-grade drafting.*

Founded in 2016, Avvoka is the drafting platform built for modern legal teams. We combine the speed of generative AI with the structure of precedent, turning your firm's expertise into drafting infrastructure. Every new document starts from your best work and the wording you trust, inside the tools your lawyers already use.

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100% client retention over three years

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