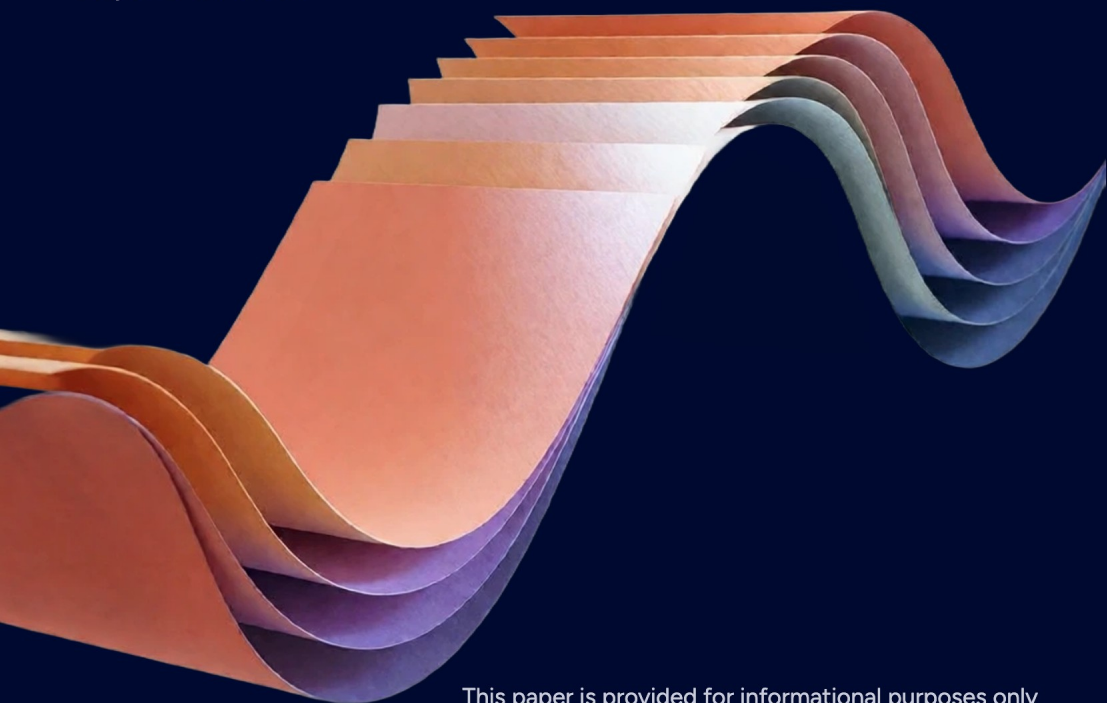




A LAW FIRM'S GUIDE TO

Switching Document Automation Platforms

How dozens of legal teams have moved off existing first-generation automation tools without disrupting the lawyers who depend on them.



Foreword

If you're reading this, perhaps something's already broken. HotDocs, Contract Express, PatternBuilder - whichever tool your firm built its library on - has become the bottleneck. Template changes take weeks. One person knows how to make them. The business keeps waiting.

What firms rarely see until they're mid-migration is how much the old platform was costing them. Not just in licence fees, but in maintenance hours, workarounds and templates nobody dares touch.

This guide is for the people managing that transition: those who need to move the firm without losing the confidence of the lawyers who depend on what's there today. Every section draws on real migrations with real clients. Most of them wish they'd done it sooner.

The best migrations are the ones nobody notices. The templates work. The integrations hold. The lawyers draft as they always have, just on better infrastructure.

What's inside?

- 01 Why firms are migrating now
 - 02 Planning the transition
 - 03 What actually changes for your lawyers
 - 04 Driving adoption
 - 05 Why Avvoka can help
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Why firms are *migrating now*

Most firms don't decide to migrate. They reach a point where staying is more expensive than moving.

The bottleneck problem

In most firms, traditional automation and template building sits with just a few specialists. Everyone else waits. When that person leaves or gets busy the queue builds. Practice groups stop asking. Lawyers go back to manual drafting.

The real cost

Licence cost is rarely the bill. Add specialist team members, consultants, infrastructure, training and the real labour of maintaining complex templates, and the total cost of ownership quietly balloons.

The platform is falling behind

The legacy platforms haven't really changed in years. The way lawyers work has. They now expect their tools to talk to each other, to plug into the systems they already use, to make the most of AI, and to feel as easy to use as everything else on their desktop. First-generation automation was never built for any of that, and the workarounds have run out of road. That gap, between what the old platform offers and what the firm actually needs today, is what most teams are really moving away from.

~20x faster

SFA drafting time drops from 3 hours to 10 minutes at a firm that moved off their legacy platform.

Hours to 10 minutes

SPA production time at a firm that migrated off Contract Express, without rebuilding their precedent library.

6 hours saved per deal

Document assembly time recovered at a European firm, from the very first template they migrated.

"We have just one person who is basically responsible for building documents."

Head of Technology, UK Firm

CASE SNAPSHOT

The integration story *we hear weekly*

A large global law firm we recently worked with was paying £100,000+ a year in middleware costs just to keep their automation tool connected to their DMS. Within three months of moving to Avvoka, the middleware was retired. The integration now runs through a single API connection, owned and maintained by their in-house team. The saving paid for the migration in year one.

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- ✓ Middleware cost eliminated
 - ✓ Integration owned in-house, not by a third-party consultancy
 - ✓ DMS handoff reduced from hours to seconds

Planning the transition

From template audit to go-live: how to plan a migration that doesn't derail your practice groups.

Start small. Move fast.

Most firms start in the same place: "We have two thousand templates - let's move them all in six months." The logic is understandable. In practice, big-bang migrations spread the team too thin, QA becomes unmanageable, and when something goes wrong there's no focused resource to fix it.

Firms that succeed do it in phases.

They start with a carefully chosen cohort (typically high-usage, moderate complexity) and move those first. They learn. They refine the workflow. They build momentum with early wins. Then they move the next wave. This builds advocacy and visible progress early on.



The template audit: *80/20, housekeeping, and prioritisation*

Before anything moves, audit what you have. For each template, ask: is it actually being used? Is it the best version? Could it be consolidated with something else?

Most firms are surprised by the answers. About 20% of a firm's templates account for the majority of document volume. The rest are edge cases, old variations, and things someone built years ago that nobody touches.

The answers from this often end up pointing to two principles: start with what's actually being used and use the moment to clean house.

Use the moment

Migration is the single best opportunity you will get to clean house. The political cover of a platform change is what lets you retire templates people have been quietly protecting for years, consolidate variations, and re-engage practice groups with template ownership. Surface the operational and political questions now, far better in planning than mid-migration.

CASE SNAPSHOT

What we saw at a *top-tier European firm*

A top-tier European firm came to us believing they needed 1,400 templates migrated. After audit, just 312 were genuinely in use. The remaining 1,088 were retired during migration. An 18-month project completed in 7.

- ✓ 77% of the legacy library retired as dead weight
- ✓ Migration timeline cut by more than half
- ✓ Practice groups re-engaged with their own template ownership for the first time in years

How to *run it*

Three things decide whether a migration succeeds: what you move first, who's on the team, and how you roll it out.

What to move first

Actions	Considerations
High-usage templates from top-revenue practice groups	Your first advocates
Templates with heavy DMS or matter-management integrations	Highest risk if left until last
Edge cases and duplicates	Consolidate or retire
Complex, low-usage rebuilds	Last, once the playbook is proven

Who you need

Role	What they bring
Sponsor	budget authority and seniority to clear blockers fast
Template owners	know how templates are actually used day-to-day
End users	partners and associates who draft daily
IT	security, infrastructure, integrations
Vendor	brings the playbook, tooling, and people who've done this before

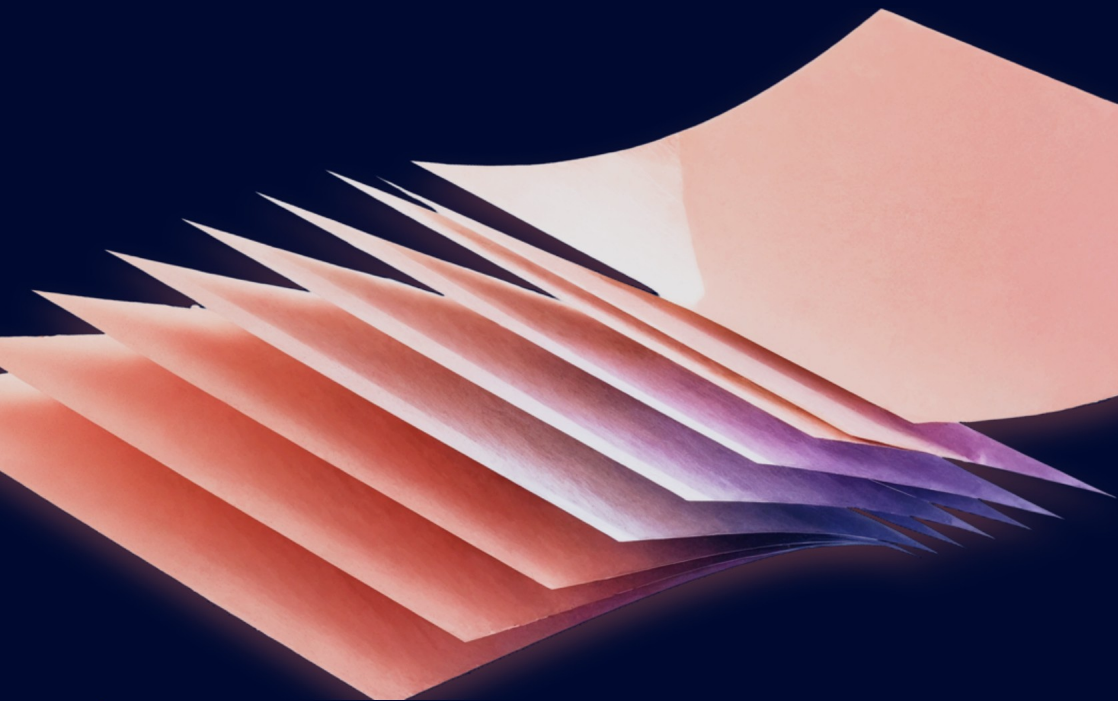
How you roll it out

- Run old and new systems in parallel for 2–4 months.
- Monitor adoption, output quality and support volume live.
- Fix bugs and answer questions in real time.
- Retire the old system only when the new one has earned it.

Each group has different success metrics. Plan for that, don't hope they align on their own. A migration is a rare chance to fix what is broken meaning you rebuild rather than reproduce.

How Awwoka *helps*

Our Customer Success team runs the playbook in this section with you - from template audit through to parallel-run cutover. We have a dedicated team of automation specialists with decades of combined experience across the major legacy automation platforms, so your people don't have to learn the source platform's quirks on the job. You bring the legal and practice-group knowledge. We bring the migration expertise. Together you achieve a seamless migration.





In practice: *Template Migration at Scale*

Top-tier law firm: 1,200 templates off legacy automation platforms in 12 months.

1200

templates

S: 480 | M: 420
L: 210 | XL: 90

4

Avvoka FTE

Dedicated
automation
specialists

30+

years combined

Legacy-platform
veterans

100

days to priority

All revenue-
critical templates
live

A top-tier law firm came to us with 1,200 templates spread across two legacy automation platforms - a decade of automation, from one-page letters to facility agreements with hundreds of conditional branches. They needed the whole portfolio on Avvoka without disrupting the lawyers who used it every day.

The Approach

Two waves: roughly 350 revenue-critical templates first, then the remaining 850 in rolling batches by size. Every template went through the same five stages: consolidate, convert, QA, early release, general release. It was a rebuild, not a lift-and-shift: templates came out cleaner and easier to maintain than the originals.

Outcome

100% of priority templates live by day 100.

Full 1,200-template portfolio migrated, consolidated and QA'd within 12 months. Delivered by a team of four Avvoka automation specialists with prior hands-on experience of the major legacy automation platforms at scale.

Example of a *Programme Timeline*

What you'd see, and when:

<i>Day 0–30:</i>	Audit complete. You know which templates you're keeping, consolidating, and retiring.
<i>Day 30–100:</i>	Priority wave live. Revenue-critical templates on Avvoka; lawyers using them on live deals.
<i>Month 4–6:</i>	First ROI visible. Time-per-deal dropping, middleware retiring, practice groups advocating.
<i>Month 6–12:</i>	Remainder migrated in rolling batches. Full portfolio live, old platform retired.
<i>Month 12+:</i>	Your own people maintaining templates. No specialist dependency.



■ Consolidation ■ Conversion ■ QA ■ Early release + feedback
■ General release

What changes for your lawyers

What actually changes for your lawyers, your IT team and your bottom line, in plain English.

Rebuild, *don't lift-and-shift*

Your lawyers open a document, fill in the fields, get the output. That part doesn't change. What changes is behind the scenes: the template that used to need a specialist to update can now be edited by the template owner in minutes, not weeks. No developer, no waiting, no backlog.

Rebuilding takes more upfront effort than a straight copy-across. The payoff is a template library your own people can maintain long after the migration is done.

What migration looks like from each seat in the firm

What you're moving	What happens in migration	What your lawyers notice	What your team notices
Standard templates	Rebuilt cleanly	Same document, same fields. No retraining.	Template owners can update without a specialist
Complex conditional logic	Re-authored in Avvoka's visual editor	Cleaner output, fewer errors on edge cases	Logic the template owner can read and edit
Custom-coded templates	Replaced with no-code logic	The templates work the way they were always supposed to	Authoring moves out of IT and into the knowledge team
Clause libraries and precedents	Imported natively	The language they know is still there	Clause banks stay governed and searchable
DMS, signature and matter system integrations	Middleware retired, native APIs in	One workflow instead of several	Fewer moving parts for IT to keep running
Usage data and analytics	Rebuilt in the new schema	No change	Clearer visibility into which templates are being used

Driving adoption

Why the best technology fails without the right rollout and what the firms who got it right did differently.

Technology is the easy part

Most legacy automation projects didn't fail on technology. They failed because lawyers didn't use them.

A tool that's slow, hard to navigate, or unpredictable will be abandoned for manual drafting every time. It happens quietly, then it happens permanently. A migration is the chance to break that pattern, but only if the rollout is treated as seriously as the technical work.



CASE SNAPSHOT

Global *Law Firm*

Leading global law firm adopted Avvoka across six practice groups after our proof of concept proved ROI with just one template saving 6 hours per transaction on a live deal. Sometimes seeing the solution in real-life is all you need - get the solution in front of partners. Show them the process live and show how the time to execution drops in real time.

- ✓ 6 hours saved per transaction on the pilot template
- ✓ Six practice groups adopted following the proof of concept
- ✓ Internal advocacy grew organically from the pilot cohort

How Avvoka *helps*

Our Customer Success team has run this adoption playbook with dozens of firms. We help you pick the right pilot templates, design training for each audience, publish the wins, and turn your first advocates into an internal movement. You will not be figuring this out on your own.

Training is not *one-size-fits-all*

Your users can split into two groups:

01

Most lawyers just want to generate documents: fill in fields, click a button, get clean output; keep their training simple with a few example templates, step-by-step instructions and a support email.

02

A smaller group of template owners and power users want to go deeper into template logic, conditional branches, and hands-on editing. They need a different curriculum. One-size-fits-all training frustrates everyone.

Two audiences. Two curricula. The firms that get adoption right treat them separately from the start. At Avvoka our approach embodies this, ensuring long term adoption and engagement.

Prove the value in the *first 30 days*

Advocacy doesn't build on promises. It builds on visible wins.

A managing partner generating two contracts a week should feel the saving on day one. An associate drafting a facility agreement should see fewer errors and more consistency. Track those wins out loud: hours saved per deal, time to close, errors caught before they leave the building. When the internal story shifts from "we switched platforms" to "this saved us three hours on the last deal", sceptics become advocates. That shift starts in the first month.

Why Avvoka?

Built for *modern legal workflows*

The legacy platforms in this guide were built for a different era. They weren't designed with APIs, cloud infrastructure, AI or non-technical users in mind.

Avvoka was built from the ground up for modern legal work. Cloud-native from day one. Every function available via API. Designed with the structured data model that modern AI workflows require. ISO 27001 certified, SOC 2 Type II, full audit trails.

That's why firms are choosing Avvoka, because it feels like it was built for the work you're doing now. By lawyers, for lawyers.

Legacy tool problem	How Avvoka addresses it
Template authoring sits with one developer	True no-code authoring - your template owners maintain their own templates. No developers required.
Legacy integrations are custom built and expensive	API-first design. Every function exposed, documented, rate-unlimited. Integrations your IT team can actually own.
Infrastructure needs constant maintenance	Cloud-native. No servers to maintain, no update windows, automatic scaling.
AI putting strain on traditional document automation	Structured, governed, API-accessible templates - ready for AI workflows from day one.
Adoption is hard to sustain	A proven migration playbook, dozens of reference clients, and a dedicated Customer Success team who will walk it with you.
Enterprise buyers need security and hosting controls	Enterprise-grade security, full audit trails, and data residency controls - built in, not bolted on.

Proven migration *experience*

The approach in this guide comes from working through these same problems across dozens of firms moving off HotDocs, Contract Express, PatternBuilder, DocAssemble and Berkeley Bridge.

Firms have migrated to Avvoka from a range of existing automation tools with minimal disruption. We know what works and what doesn't. We know how to structure the migration, phase the rollout, and support lawyers through the transition. With Avvoka you are following a well-trodden path, and one that we walk with you.

“One of the best platforms I have implemented in my career.”

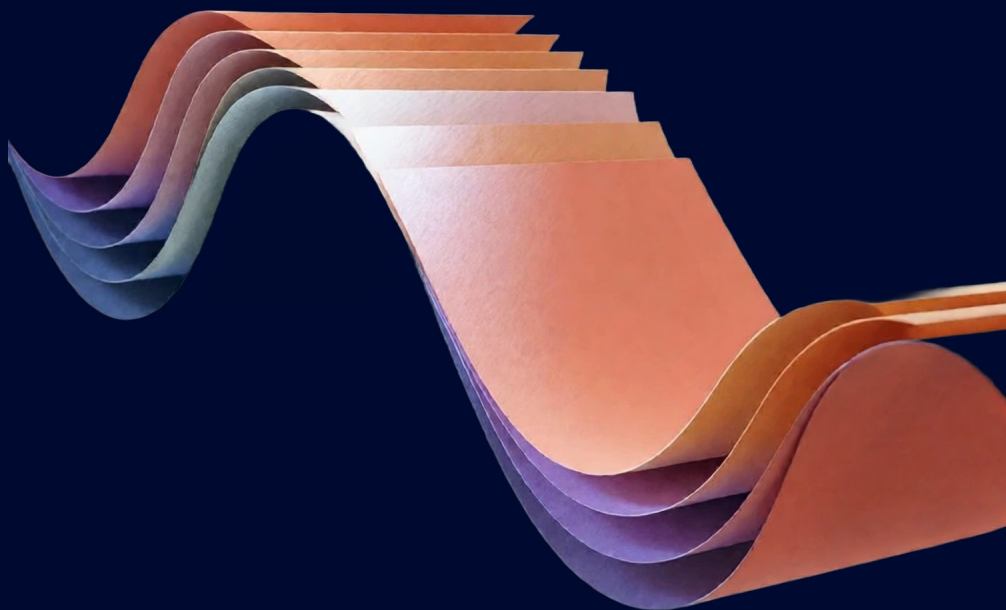
Head of IT, CLS Holdings

Ready to *explore*?

If the problems in this guide sound familiar, the next step is simple. Get in touch with us today to explore more about how a migration can benefit your business.

Book in Call With Migration Expert →

This paper is provided for informational purposes only and does not constitute legal advice. While based on experience migrating firms to modern automation platforms, each firm's migration path will be unique and should be tailored to your specific requirements, infrastructure, and goals.



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