

Tungsten Automation Solutions for Legal Document Workflows

White Paper

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Document workflows are a frequent source of slowdowns and errors for legal professionals. See how Tungsten can modernize these processes.

Modernize and Streamline Legal Document Workflows

In the legal profession, errors aren't acceptable, and neither is slow work that doesn't produce positive results quickly. Still, these issues persist and plague many lawyers. From small and large private law firms to corporate legal divisions, these professionals deliver vital support, insight, and guidance. None are immune to bottlenecks, slowdowns, and poor efficiency in key document workflows. All are capable of making costly mistakes.

Reducing the likelihood of mistakes and accelerating legal work is essential—especially in today's increasingly fast-paced environment. Paperwork is a considerable concern, from tracking documents to receiving signatures. Document workflows often remain bogged down by manual work and poor technological integration. When that happens, the effects can impact entire processes. One misplaced document could derail an entire workday.

Modern workflow automation removes the potential threat. Instead, it offers tools for legal professionals today that can fundamentally reshape the work. Tungsten fields a range of advanced products suitable for the legal field, from document productivity solutions to intelligent automation.

This article examines the challenges facing lawyers today and explores how Tungsten solutions can open the door to streamlined, modern, and reliable document workflows. Let's consider what it means to automate these processes in the first place.



What Is Workflow Automation?

Workflow automation, by definition, is the usage of software and other technology to reduce the burden placed on human employees. Many business processes comprise several or even dozens of different steps. Not all these steps necessarily require human intervention—except for a lack of technology to make it happen. Workflow automation is the process of developing the solutions necessary to augment human workers with digital and technological support. Fewer manual steps mean faster results and better outcomes.

Today, automation has touched almost every industry. Some of the most common use cases include:

- [Accounts payable automation](#) in finance, including automatic extraction of high-quality data from scanned papers or digital documents.
- Supply chain automation that tracks inventory levels, demand and more to create accurate forecasts or to trigger product movements for just-in-time manufacturing.
- Customer service support. Intelligent automation can put key facts in front of CS representatives faster, while other solutions can power customer self-service portals.

The legal industry benefits from automation, too. Document capture is a vast process. During periods of legal discovery, processing huge volumes of information rapidly may be necessary. Like in any other business, there are bills to pay, invoices to manage, and customer service needs. Automation can impact the legal sector the same way it has helped transform other spaces.

Why take the plunge and start investing in automation for your legal team? For some firms, the risks of new spending and integrating new technology might not seem worthwhile. To highlight how valuable automation can be, we must examine closely why and where traditional processes fall short in the modern workplace.

Managing Challenges and the Need for Reducing Manual Work

Legal professionals face many efficiency concerns daily. In offices where manual process intervention is very high, the opportunity for costly errors increases—the more touches, the more opportunities for mistakes.

Some of the specific issues in this area include:

- **Proper versioning.** Legal documents may go through multiple drafts before they're ready for filing, submission or sending. Manual version control is a challenge and prone to mistakes or oversights. Filing the wrong version of a contract or document could have significant repercussions.
- **Data privacy and compliance concerns.** Legal teams may handle extensive amounts of personal data or private information about the business. Data leaks and other accidents could expose this data and put your team at risk.
- **Workflow delays and poor business outcomes.** A team that takes weeks to review and finalize documents may be unable to support client needs satisfactorily. Long review processes reduce positive outcomes.
- **Lost information.** Some cases or jobs may require handling thousands of pages of paperwork and just as many digital documents. Losing track of this information creates further delays and can impact revenue negatively.

These issues are common concerns across all layers of the legal field. They also have another aspect in common. Workflow automation can help address each of these in turn.

How Better Automation Delivers Positive Impacts for Legal Professionals

Automation comes in many forms. Today's solutions offer an adaptable and versatile way to streamline even complex legal processes. Properly configured and deployed, you can equip teams with robust support from intelligent automation solutions. In doing so, it's possible to capture critical benefits, such as:

- **Improved daily productivity** and engagement with high-value tasks over low-level menial work.
- **Faster results for clients and companies.** Teams that don't need to spend hours on manual work can produce better outcomes daily.
- **Reduced error rates and problems.** Stop errors from entering into your data or workflows in the first place. Make finding problems that do arise simpler and faster.

Legal teams can confidently turn to Tungsten and our partners' support to tap into these benefits.

Powering Modern Transformations with Tungsten

[Tungsten](#) is an industry-leading provider of business automation solutions with nearly 40 years of experience. From the first significant forays into workflow automation to the advent of artificial intelligence and modern machine learning, Tungsten has always been on the cutting edge. Today, our goal is to deliver technology that opens the door to fundamental transformations.

Our skills and solutions serve many sectors, but the legal industry has always been a focus for us. Our platforms make better document management, data capture, and process change possible. Tungsten [TotalAgility](#), for example, is a very flexible and customizable intelligent automation platform for overhauling extensive processes. [Tungsten RPA](#) supports securely moving data between legal systems and carrying out other menial rules-based tasks.

We also focus on better software for in-office document management. [Tungsten Power PDF](#) and [Printix](#) can fundamentally reshape how you handle tasks. We further enhance the value of these offerings with the Tungsten Marketplace, an online resource filled with pre-made automation solutions from other industry experts.

Combining our platforms with Marketplace solutions can provide a shorter path towards a positive ROI and everyday workflow impacts from automation. Let's review some ways you can use these resources to your advantage.

What Tungsten Offers the Legal Sector

With Tungsten and Marketplace solutions, you can create impacts on many legal workflows. These include:

- Client or customer onboarding processes with [Tungsten RPA](#), TotalAgility and more.
- Onboarding processes for new team members, from receptionists and paralegals to partners, using [Marketplace solutions built on TotalAgility](#).
- Accounts payable and internal accounting processes using [AP Essentials](#).
- Compliance workflows, including redaction and encryption using Power PDF.
- Signature workflows. Power PDF features secure electronic signatures via SignDoc, making it easy to gather authorization from clients and others securely.

With these capabilities, you can bring tangible benefits to your operations.

Unlocking Benefits Via More Advanced Automation

The right combination of automation and skill creates opportunities for essential benefits in your organization. Here are a few ways legal teams use Tungsten products today.

1. Streamline Billing and Improve Accuracy

Billing is a critical undertaking in every law office because of the nature of recording hours and tasks. Centralizing billing processes and improving data collection from each individual in the firm can simplify tracking expenses. Tungsten solutions can automate the capture of billable hour information from paper copies or transfer data from a web portal into accounting software.

With RPA and intelligent automation, billing processes can be better controlled. Getting started is easy, too, as users can see in the *Build a Robot in 2 Minutes* solution from Tungsten Labs.

One law firm that deployed the Tungsten solution, Equitrac, saw significant improvements in client billing procedures. Time spent on document tasks such as copying, printing and scanning was poorly captured or understood. With Equitrac, the firm gained deeper visibility into these processes and developed a better way to track expenses and bill clients. Clients benefitted from more realistic fixed fees while the business gained robust control over costs.

Beyond tracking billable hours, legal teams can improve their relationships with suppliers and vendors of other services. Accounts payable automation with platforms such as AP Essentials can save thousands of work hours yearly while reducing errors and expediting payments. Don't let AP be an afterthought in your firm when it can help drive efficiency improvements across the organization.

2. Maintain Regulatory Compliance Where Required

Compliance with the law may be a concern when handling sensitive or personally identifiable information. Legal teams must support their clients or parent companies with services that always operate within the boundaries of the law. Tungsten can also support you in these pursuits.

Power PDF includes built-in redaction tools that simplify blacking out sensitive information for compliance purposes. These tools make it easy to find and redact all personal information or other vital data in a document. You can also rely on Marketplace Solutions for more advanced support.

For example, the [RedactAI solution](#) perfectly matches legal teams using TotalAgility for process automation. This specially-trained AI tool can ingest documents from multiple sources and formats. Using natural language processing, RedactAI automatically identifies standard information for redaction, from Social Security numbers to names, birthdays and more. When filing sensitive documents or releasing information to the public, such a solution saves time and boosts accuracy in a core workflow.

Our cloud printing solution, Printix, helps support good governance and innovative data practices. Lawyers may need to print out documents that contain sensitive information. With print-to-me functionality and a secure cloud environment, print jobs remain on hold until the appropriate user authenticates and releases the job to the printer. Though simple, this functionality helps keep information out of the wrong hands.

3. Capably Handle Many Sources & Types of Data

Diverse document formats are a challenge for legal teams. These documents may arrive from clients, courts, companies, or law firms. Rarely do all these groups use the same format for their information. In some cases, specialty document formats may even be in the mix. You'll likely encounter more than Word documents, Excel files, and PDFs. XML files, CSV files, and more all flow into your organization and may require classification and extraction.

You need better ways to manage these documents to provide your clients with high-value service. Power PDF is again a go-to solution, capable of converting many document formats into PDF and more. Direct integration with your document management system means accessing and sharing these files is quick and painless.

[Tungsten Capture](#) and other tools equipped with cognitive capture simplify data extraction even from large and complex files. Software connectors in the Marketplace help filter that extracted information into your business systems. All these processes are steps that employees would otherwise need to handle manually. With Power PDF and other solutions, you can eliminate time-consuming steps and replace them with a better way to work.

Tips for Succeeding with Legal Workflow Automation

How can you give your automation projects the best chance for success? Choosing the right platforms and products is the first step. With Tungsten platforms on your side, you already have the capabilities necessary to create meaningful and valuable change across your document workflows. However, there are other things to remember as you proceed:

- Assess your existing processes and consider where you need to make changes. Where are the bottlenecks? What document-based processes take the longest to complete? Use this information to guide your decisions about automation investments.
- Involve stakeholders across the business in the process. Work with those benefitting directly from the process changes to understand their needs. Demonstrate the value of automation to leadership.
- Choose your projects carefully and leverage all the resources available to you. Don't overlook the value of Tungsten Marketplace solutions, which could save you weeks or months of development and testing time.
- Always verify the reliability of your solutions in testing before deploying them in production. Bring team members up to speed with training and prepare the firm to work harmoniously with automation platforms.

With a thoughtful approach, legal teams can invest in automation today to produce better work outcomes for years to come.

Explore What's Possible with Better Technology

As the speed of business accelerates, everyone must consider how to remain on the cutting edge. Continuing to rely on manual workflows and outdated technology is no longer an option. Legal teams can achieve a potent transformation with better tools and greater visibility into their work. The results go beyond better team morale and improved daily results. Better compliance, innovative insights and enhanced client outcomes are all possible.

Tungsten products and solutions make it all possible. Let us help you achieve better business outcomes on a shorter time scale. There are countless ways to rewire your work methods, from Power PDF and Printix to advanced automation and [Marketplace solutions](#). Start your automation journey today and say goodbye to tedious, error-prone document workflows. With intelligent automation and modern software, you can deliver faster, better results to your clients today.



About Tungsten Automation

Tungsten Automation, formerly Kofax, is the global leader in intelligent automation solutions with a trusted legacy of nearly 40 years, with a team of 2,000+ employees in 40 countries, serving 25,000+ global customers. Our dedication to innovation and customer success has earned us industry recognition, including being named a leader in Intelligent Automation (IA), Intelligent Document Processing (IDP) and Process Orchestration by top analysts. We are trusted to help businesses gain unprecedented efficiencies and reduce costs through AI-powered workflow automations that propel their businesses into the future.

To learn more, visit www.TungstenAutomation.com

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