From Manual to Automated: Breaking Free from Legacy Processes

Manual legacy processes can be a major obstacle to successful legal automation. Legacy processes refer to established procedures that have been used for a long time and are deeply ingrained in an organization's culture. These processes may have worked well in the past, but as legal technology continues to evolve, legacy processes can become inefficient and time-consuming. Addressing legacy processes requires a willingness to review your legal operations with fresh eyes and to be open to new ways of doing things. By doing so, you can identify areas where automation could be implemented to improve processes and achieve greater efficiency and cost savings.

Legacy processes often rely on manual labor to perform tasks that could be easily automated. Manual labor is uneconomical when highly skilled staff are performing routine tasks, as demonstrated by paralegals in many IP law firms who still use an inefficient and unnecessary legacy process to manually track prior art references on a spreadsheet, despite having an IP Management System with automated reference management capabilities. Similarly, high-value patent attorneys often do tedious manual tasks like manually creating patent application templates or copying and pasting claims to create Summary and Abstract sections in patent applications, despite having productivity tools available to automate these tasks. Manual labor in legal processes can also increase the risk of errors, such as manually managing and tracking US PTO deadlines, even though automated docketing solutions are available. This can lead to incorrect data in the docketing system or worse, a missed deadline that could result in liability for the law firm.

To effectively overcome manual legacy processes in legal operations, it is crucial to take a multi-pronged approach. The first step is to identify and prioritize legacy processes that are the most resource-intensive or time-consuming, where replacing a manual process with an automated process will have the most significant impact on freeing up staff time or improving attorney efficiency. This involves looking at the types of tasks completed using legacy processes and determining which tasks take the most time each week or month. For IP support staff, the answer to that question is often IDS/reference management or preparing shell responses to Office Actions both of which are very resource intensive when done manually.

Secondly, organizations should select and implement the appropriate tools and technologies to streamline the processes identified in the first step and eliminate manual tasks. It is important not to overlook the technology that the firm already has. As mentioned earlier, fully utilizing existing technology within the firm, such as an IP Management System with automated reference management capabilities, can yield faster and more cost-effective results compared to searching for and implementing new technology.

Lastly, in addition to selecting and implementing the right tools and technologies, organizations must also ensure that their employees are proficient in using them. This requires providing comprehensive training and support to all staff and attorneys. You should work with technology vendors to help them understand what features are the most important to your organization

and prioritize training on the features that will have the most significant impact on efficiency. It's crucial to make sure that the right people are getting trained on the right features.

In conclusion, manual legacy processes can hinder legal operations by wasting time and resources that could be better used for more valuable work. However, by identifying the most resource-intensive or time-consuming legacy processes, selecting and implementing the right tools and technologies to streamline those processes, and providing comprehensive training to employees on the technology, you can successfully transition to more efficient automated processes. By doing so, you can break free from legacy processes and unlock numerous benefits, including increased efficiency, cost savings, and reduced risk of human errors.