



Mastering Legal Document Automation



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Before we get started...



- You will receive an email with a link to download the full deck.
- Recording will be available soon.
- Connect with us on LinkedIn.

About Athennian

Athennian's corporate entity data management software is used by hundreds of top law firms and in-house legal teams, to manage all their entity data within a single platform. Athennian's cloud-based platform makes entity management more efficient by building in automation, customizable workflows, dynamic reports, and self-serve digital experiences.



What Are The Benefits Of Document Automation And Why Should Invest In It?

Benefits of **Document Automation**:

- **Consistency**
- **Reduces time** to create draft documents
- **Reduce errors**





So why aren't more teams investing in **legal document coding**?

Common **challenges** we hear from legal teams:

- No one knows how to code, it's so **complicated**
- It is **expensive**, non billable time
- The **software** I'm using doesn't get it 100% right



How To Get Started With Legal Document Coding

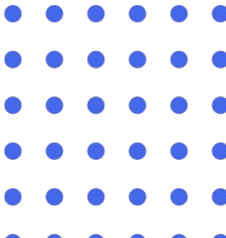
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DIRECTORS' REGISTER

{entity_entityName | upper}

NAME & ADDRESS	START DATE			END DATE		
	DD	MM	YY	DD	MM	YY
directors sort:'electedDate' {name} other {other} {/} {#poBox} {poBox} {/} {#suite} {suite} {/} {street} ity), {provinceState} {postalZip}	{elected Date time:'DD' }	{elected Date time:'MM' }	{elected Date time:'YY' }	{endDat e time:'DD' }	{endDat e time:'MM' }	{endDa e time:'Y' }

- Field Merge
- Logic Statements
- Formatting
- Repeating Table



1. Be Smart About What You Can Actually Automate



Be Smart About What You Can Actually Automate

- Repeatability is key, technology can only build logic off of data points
- Assess the value of what you are automating
- Don't underestimate automation of formatting



2. Invest In Scoping The Project First (before you write a single line of code)



Invest In Scoping The Project First

- What is your formatting style guide?
- How many different variations of a document are there?
- What data points will you use?
- Do you want to package some documents together or have them separate?
- Don't leave everything open for assumptions.



3. Start Small, Prove Out The Full Workflow



Start Small, Prove Out The Full Workflow

- Start with simple, high volume templates
- Enter the data and walk through how you plan to generate the document
- Break up your template into manageable testing blocks



4. Test, And Then Test Again



Creating an Auditable system

- Generate & review all the variations of expected output
- Maintain version control for change management purposes
- Prepare for both internal & external audits



What to look for in a Cloud App Provider

- ✓ Top-notch security
- ✓ Dedicated support from legal professionals
- ✓ Accessibility & 24/7 availability
- ✓ Weekly feature updates based on user feedback & best practices



Evaluating a Legal Software?



Get the Checklist

Modern digital transformation in entity management requires a full-circle approach that combines change management, technology adoption, risk mitigation, and dedicated product innovation.

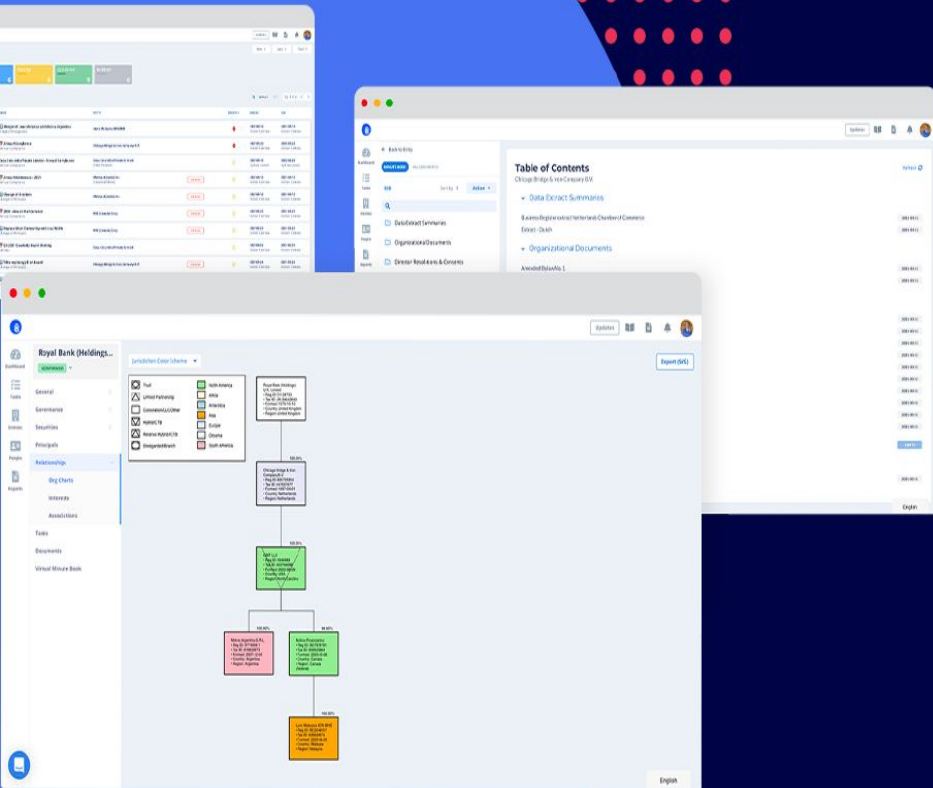
Use this checklist to assess a vendor's expertise and capacity to support your organization's unique business objectives.



Why Athennian?

“When coding, I’ll start simple, and if I think it could be better, I can always reach out and get someone to take a look at it to see where I’m lacking.”

**- Melody Gibson, Senior Paralegal,
Inter Pipeline**



Q&A





Thank you!

