



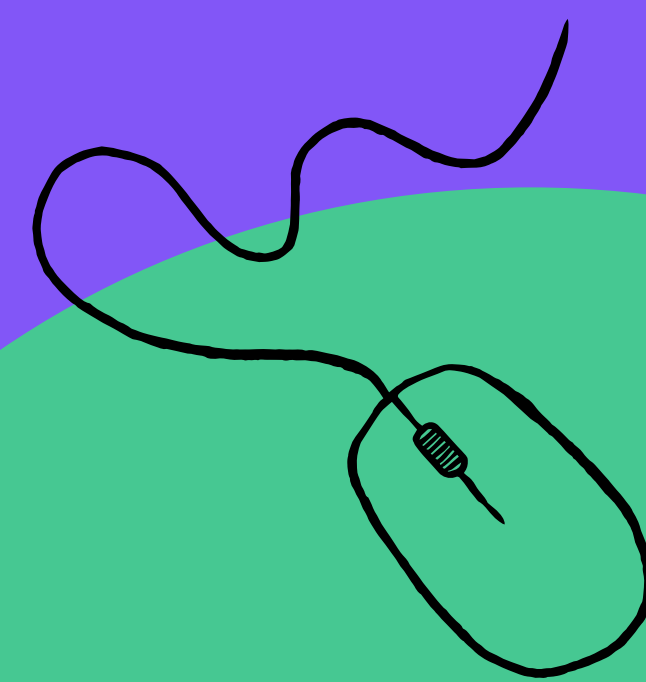
Legal Document Automation Guide

Generate legal documents in a fraction of the time with rules-based automation.

In this Guide.

- ✓ What is legal document automation?
- ✓ What are the benefits?
- ✓ How can I start automating?
- ✓ The bottom line

Access the full web version of the Guide.



Law firms use document automation to rapidly draft and generate documents, including forms, agreements, letters, and other legal documents.

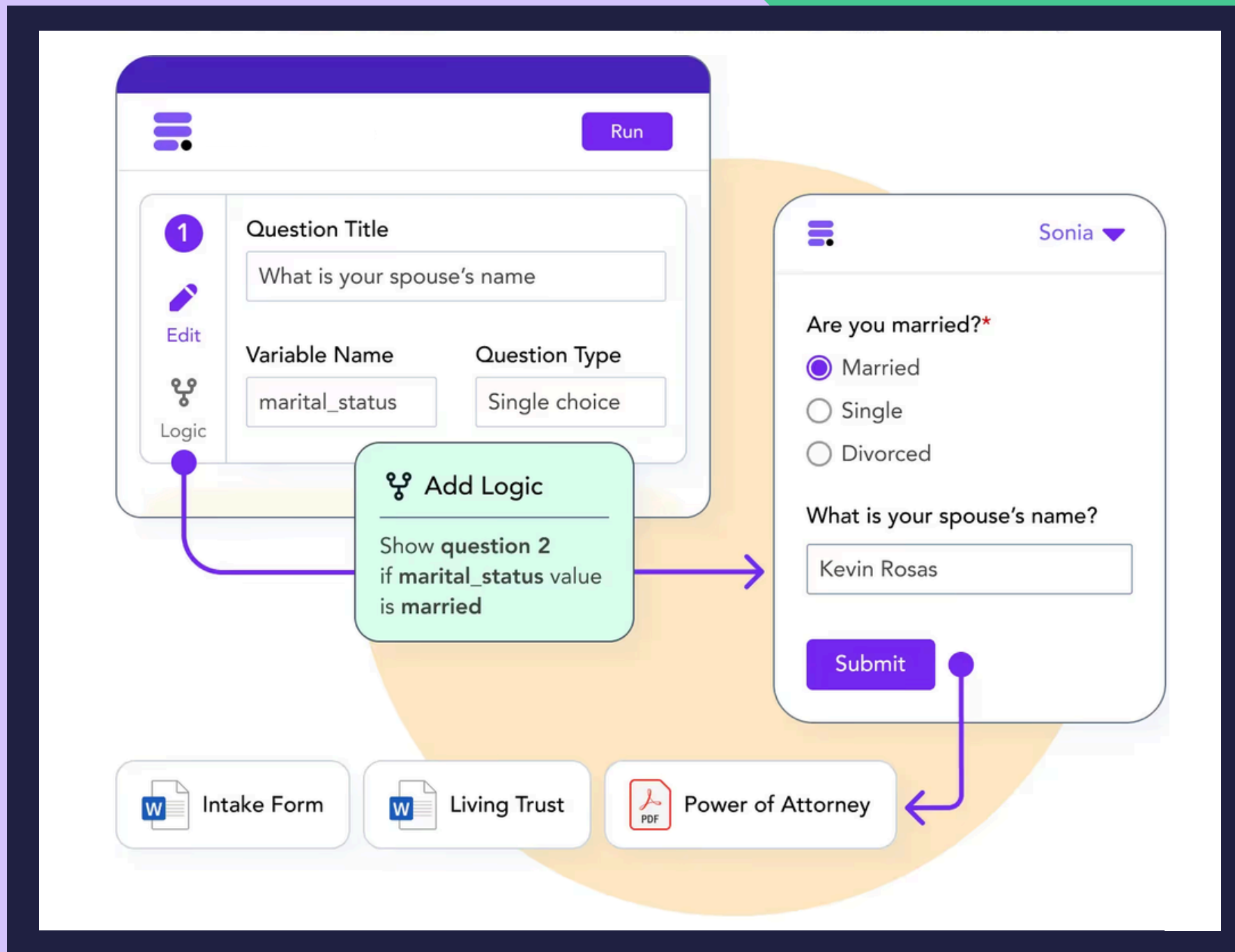
In this guide, learn more about the benefits of law firm document automation, how to get started, features to look for in your software, and how to launch your document assembly tool in your law firm.

What is it?

Document automation is the process of generating one or more documents from a set of rules.

If you can identify rules for the templates you draft using "if this, then that" statements, it will help generate error-free documents in a fraction of the time.

Ex: An estate planning attorney can generate an entire estate plan (will, trust, POA, etc.) in a matter of minutes instead of hours. One rule could be, "show this section in the will if the client is married AND resides in California."



Law Firm Templates

gavel

Dashboard brittany

● Settlor Information

● Living Trust

● Grant Deed

● General Assignment

● Pour-Over Will

● Power of Attorney (Financial)

● Advance Health Care Directive

Welcome to the Estate Planning Documents Generator!

This workflow will allow you to generate documents estate planning documents for an individual, tailored specifically for the state of California. Upon completion of this intake, some or all of the following documents may be generated for you based on your selection and entries.

- Revocable Living Trust
- A Pour-Over Will
- Durable Power of Attorney (Financial)
- Advance Health Care Directive
- Grant Deed (for real estate property)
- General assignment (for tangible personal property)

Which documents do you wish to generate?

Revocable Living Trust

Durable Power of Attorney (Financial)

Advance Health Care Directive

Here are your documents!

[← Back](#)

Beneficiary Designation Information (California)

[↓ PDF](#)

Michael Theodore Mouse - Advance Health Care Directive (California)

[↓ DOCX](#)

Estate Planning Set 1 - Summary of Entries

[↓ PDF](#)

Michael Theodore Mouse - Durable Financial Power Of Attorney (California)

[↓ DOCX](#)

Grant Deed - 123 M&M St. San Marcos, CA 92069

[↓ DOCX](#)

Michael Theodore Mouse - Living Trust (California)

[↓ DOCX](#)

LIVING TRUST OF MICHAEL THEODORE MOUSE

Dated December 11, 2024

This Living Trust Agreement (this "Agreement" or "Trust"), dated December 11, 2024, between MICHAEL THEODORE MOUSE (the "Settlor") of San Marcos, California and MINERVA ELIZA MOUSE of San Marcos, California, as trustee of this Agreement (the "Trustee").

Declaration. MINERVA ELIZA MOUSE hereby declares that she has received certain property (the "trust estate") from MICHAEL THEODORE MOUSE, and holds that property in trust, to be held, administered, and distributed according to the terms of this instrument.

Effective Date. This Agreement shall be effective on the date it is executed by the parties.

In consideration of the mutual covenants and promises set forth in this Agreement, the Settlor and the Trustee agree as follows:


ARTICLE I. PURPOSE. The purpose of this Agreement is to establish a Trust to receive and manage assets for the benefit of the Settlor during the Settlor's lifetime, and to further manage and distribute the assets of the Trust upon the death of the Settlor.

ARTICLE II. NAMES OF TRUSTS. The trusts created by this instrument shall be known collectively as the "Living Trust of MICHAEL THEODORE MOUSE dated December 11, 2024" and each separate trust created under this instrument shall be referred to by adding the name or designation of that separate trust as it appears in the appropriate section of this instrument. The assets and dealings of the Trust may, however, be held and conducted in the name of the Trustee and, to the extent otherwise permitted herein, also in the name of a nominee.

ARTICLE III. FUNDING OF TRUST. Settlor has transferred, assigned, conveyed and delivered to the Trustee the property described in Schedule A attached and made a part hereof;

The Benefits.


Legal document automation can provide many benefits for law firms. Here is a list of the top 5!



hello divorce.

“

"Gavel is infinitely powerful, but also super easy to use. It can handle nested conditional logic and complex calculations. But what makes it stand out are the client-facing features."



Erin Levine,
Managing Attorney at HelloDivorce



Save time on administrative tasks

Legal document automation can play a key role in improving efficiency and reducing costs.

Gavel clients have said that by utilizing its software, they have saved upwards of 90% of the time they had previously spent on crafting legal documents.



Increase revenue & profitability

If you are spending less time on drafting client documents, you will have more time for business development, and you'll have the capacity to handle more cases.

This can actually lead to more billable hours and, as a result, more revenue for your firm.



Improve your law firm's KPIs

Automation can also help improve your firm's key performance indicators (KPIs).

Utilization rate - Number of hours billed divided by hours in the workday.

Realization rate - Hours on the final invoice vs. the hours actually worked.

Collection rate - Number of invoiced hours collected / total invoiced hours.



Improve the quality of work product

Implementing document automation tools helps you create dynamic document templates that standardize your language while also adapting to the specific facts of your client's situation.



Optimize your clients' experience

In a recent survey, ranging from solo law firms to the AmLaw 50, 75% of attorneys received unsolicited compliments from their clients about the efficiency and clarity of the intake process built on their legal automation software (Gavel, of course!).

1

Identify your goals

Before you start automating your documents, it's important to take a step back and identify your goals.

What do you hope to achieve by automating your documents? Once you have a clear understanding of your goals, you can choose the right software and tools to help.

2

Analyze your workflow

How do you currently create and manage your documents? What bottlenecks or pain points exist in your process?

Automating your documents will be much easier if you have a clear understanding of how your workflow currently works.

3

Choose the right automation software

Do you want a cloud-based platform (usually easy to learn) or on-premise (often requires a developer to implement)? Does the new software work with the technology you already use? Does it have a public API that allows it to connect with any legal practice management software?

4

Train your staff

Document automation can be a big change for law firms, so it's also important that you get team buy-in. The right training can help get everyone on board and comfortable with using a new system.

5

Monitor and optimize

After you have implemented document automation, it's important to monitor your process and make sure it's working as efficiently as possible.

Are there any areas where you can improve? Are there any bottlenecks in your process?

Start here.

Legal document automation can help you achieve your goals and improve your bottom line.

There are many ways to implement document automation effectively.

Here are some tips on how to implement systems like Gavel in your law firm to generate perfectly formatted and customized documents every single time.



Bottom line.

Is automation only for the big firms or can I use it as a sole practitioner?

Document automation can be a game-changer for firms of any size when implemented with the right platform.



“Love the simplicity of setup and the complexity of opportunities.”



Michael S.
Co-Founder and CEO of Smith Barid, LLC



What to look for in a document automation solution:

- How robust is the document generation?
 - Does it support repeating and nested repeating items?
 - Can you reference repeating items in subsequent questions?
 - Can you add multiple layers of logic and complex calculations?
- Supported document types – Word, PDF, etc.
- Integrations – CRMs, eSignature, payments
- Client-facing capability and client portals

Practice areas:

- Estate Planning
- Probate
- Family Law
- Real Estate Law
- Corporate
- Immigration
- Bankruptcy

Any document-heavy practice area is ripe for automation.

Automate these first:

- Client intake forms
- Client contracts
- Court forms
- Estate plans
- Settlement agreements
- Family law forms
- Standard motions

Virtually any document in any jurisdiction can be automated.

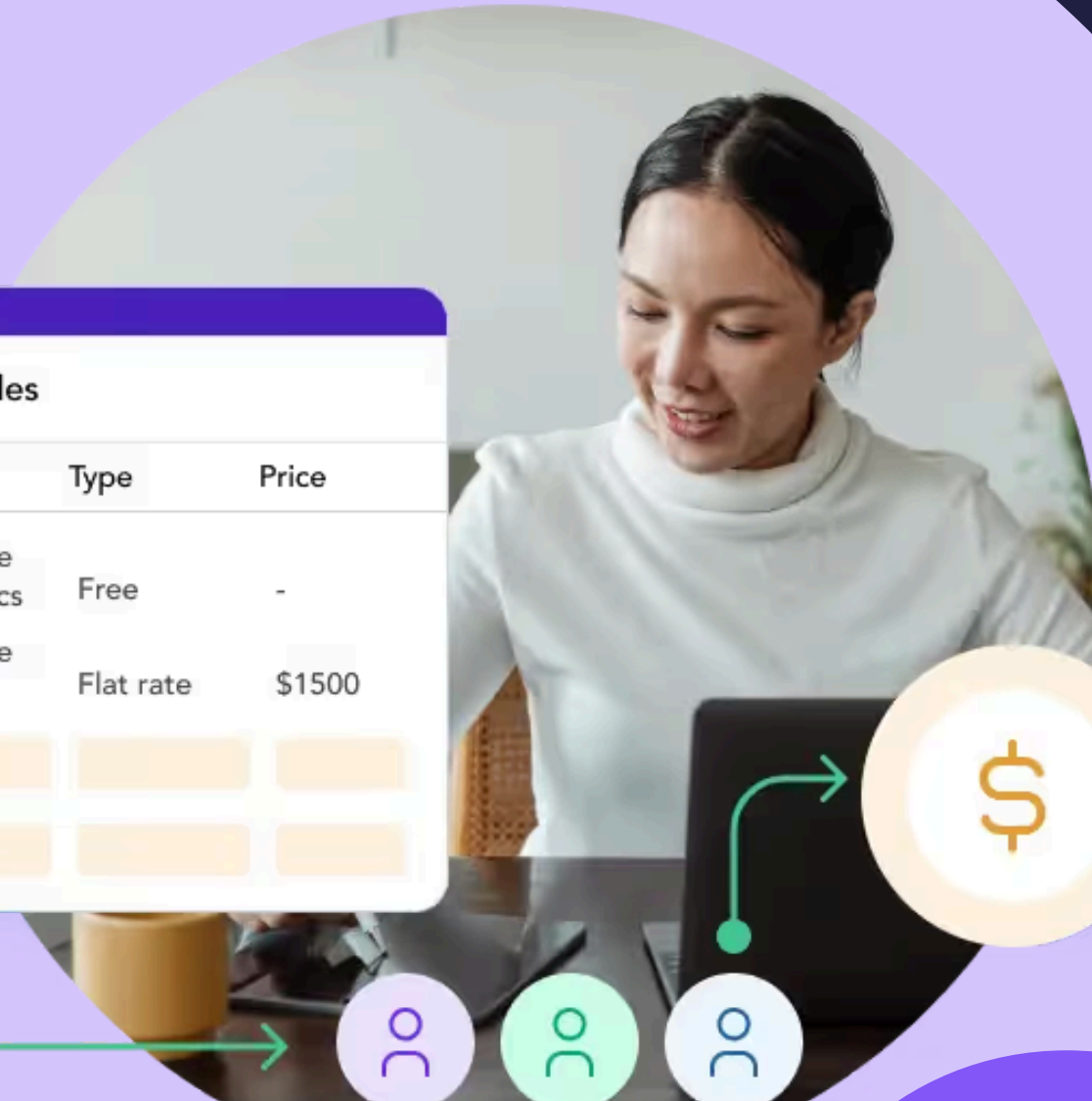
Learn more.

Ready to get hands-on?

Start [your free trial](#) of Gavel or [sign up](#) for a free law firm document automation consultation!



Use the code **GUIDE-50** for 50% off your first month!



Bundle	Type	Price
CA Divorce Filing Basics	Free	-
CA Divorce Filing Pro	Flat rate	\$1500

Go one step further by [monetizing your automations!](#)

