Ep #93: Legal Document Automation: Building Productized Legal Services with Laura Patton

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With Your Host

John E. Grant

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John: Several years ago, attorney Laura Patton got the kind of call that every parent dreads. Her college-age son was in the ER, and the doctor wouldn't reveal his condition to her because he didn't have an advance care directive. Once everything was okay, Laura realized that something huge was missing from both her personal and professional worlds. And that moment set her on a path to use an open-source document automation platform to build Scholar Shield, a productized legal service that gives parents a low-cost way to help protect their adult kids.

In today's episode, Laura shares how she turned a frightening experience into a streamlined system that expands access to legal help, saves time, and keeps the human touch at the center of it all.

You're listening to the Agile Attorney Podcast powered by Agile Attorney Consulting and Greenline Legal. I'm John Grant, and it is my mission to help legal professionals of all kinds build practices that are profitable, sustainable, and scalable for themselves and the communities they serve. Ready to become a more Agile Attorney? Let's go.

All right, welcome back, everybody. So, I'm excited this week to welcome Laura Patton. And it's kind of interesting timing because a few months ago, now, I talked with Quentin Stenhouse and Lemon Legal, and some of the work that he's doing helping lawyers with document automation. And Laura is actually someone who has worked with Quentin, and I think some others, but has had a good long journey with document automation for improving both the efficiency and the back end of her practice, and I think the quality of her work product. And so, Laura, welcome to the podcast.

Laura: Thank you so much, John.

John: So, tell me a little bit about, or tell everyone a little bit about your law practice and kind of how you got to where you are today in your solo small firm practice journey.

Laura: So this is the 90s. We just started with email. I did lots of letters and lots of things by paper. There was no such thing as a paperless office in those days. So, just to cut to the chase, I'm now almost completely virtual and my practice has evolved to be estate planning for my inner circle, so to speak, my current clients who I've had for the last 30 years. But I don't take new estate planning clients. Instead, I'm serving them and their families for trust administration, probates, will administration, and things like that. So that's the bulk of my practice now. And now it is full-time, not part-time, because I raised my 3 kids and got them through school. They're all out of the nest now. And so now I, I can design a practice that's more digital, much less paper. It's not completely paper-free, but it's paper*less*. And that's been my goal for quite a while.

John: All right. Well, so, something you said, and gonna to try to frame this in the right way, but there's something about actually going to people's homes and speaking with them on their turf, right? In their natural environment. I don't mean it that, you know, sound like a Discovery Channel documentary, but in the world where they exist. And you see things and you pick up on things when you can see things with your own eyes that I think is so important and so missed by many, many of the types of law that we practice. And so, one of the things I'm curious about is now that you have a mostly paperless, virtual practice, how do you think about making the kinds of connections and getting the types of information that you have with those clients if you can't sit across the table and get to know them face to face?

Laura: Now, I can serve clients all over California. So, having a virtual office based on video conferencing has allowed me to serve more people at a lower cost because I don't have to build in the cost of my travel time. So it's been a wonderful thing, and also not having to drive all over the place.

John: Yes, definitely. Well, and you've embraced the thing that I talk about. You know, occasionally I'm invited to speak with newer attorneys, and one of the points I always try to make is that your license to practice law is not a limitation. There's lots of things you can do to help your clients and look at it through a more holistic way. And it's another part of the thing I say and have said on the podcast a lot, which is I think of lawyering as fundamentally being a caregiving profession. And I don't think a lot, I mean, I know there are a lot of lawyers that don't necessarily think of themselves that way. It sounds to me like you very much do. I mean, you, you exhibit it.

Laura: Thanks for noticing that. I think that is part of my personality, I'm pretty empathetic. I'm somebody who picks up on the cues. I'm always trying to solve problems for people if they'll let me. But as an attorney, usually people are asking you for advice. It's very different from in my family, where I'm like, oh, I really wish they would ask me for advice so I could tell them how they really need to fix this thing, but I'm not going to do that, right? But as an attorney, that is our job is to ask for advice. People call us for advice. So I love that role. I love trying to solve problems for people.

But the caregiving side is what brings me a lot of joy because that's where you can connect with people and figure out what their needs are at this moment, and what resources do we have? Do I have? And if I don't have some, I probably know somebody who has some. So I can make a couple of calls, connect that person, for example, with a client that I had whose mom had passed, had a bunch of jewelry, she didn't know what to do with this costume jewelry. Well, I happen to know somebody who works in the organizing space and clearing estates and who has connections with auction houses and places where jewelry can be put on the market and sold for, you know, good prices. And it's a service that takes a lot of pressure off the family to deal with a lot of stuff they don't want. So there's so many services that we attorneys can connect our clients to just to be of, of help to them.

But one of the things that comes up a lot is when my clients have young kids, and then their kids get older, they turn 18, and they call me and they say, "Ah, my son is 18 and he's about to go to college. What am I supposed to do about his estate planning? Does he need a will? What do we do?" So this is something that I started working on with automating documents.

John: Yeah. Okay. Let me bring you there. So, like this deep focus on client care, on individualized service, and yet you have a very technology-forward practice. And I think a lot of people assume that when you're adopting technology, it's like, well, I'm going for speed or I'm going for volume. But that's not really how you're thinking of it. So tell me a little bit about, you started on the document automation journey, and I interrupted you, but where did you start, and what were the sorts of needs that you were trying to solve fo,r and how has it evolved over the years?

Laura: Yeah, so, well, when I first started drafting estate plans, and here in California, we often do trust-based plans. It's kind of the standard of practice here because probate is slow. It's expensive. Most people don't want a probate procedure. So it's pretty typical to use trust-based plans. Well, trusts are, well, they can be quite complicated. There's a lot of choices from a practitioner standpoint about what strategy do we use? Are we going to have a split-trust when the first spouse dies? Are we going to have children's trusts? Are we going to have legacy trusts? Are we going to have irrevocable trusts? It's kind of a complex area. So I spent a lot of time early in my practice trying to synthesize the different designs and strategies of trusts so that I could then help my clients pick what works for them, right?

So, I spent a lot of time in the law library. I spent a lot of time doing seminars. And once I would choose or help the client choose a design for their estate plan or their trust, then the question was, okay, I've got to make sure I get the forms, the templates, the clauses, I've got to get the right provisions in here. And putting that all together is unwieldy in the 90s. It was extremely complicated.

So, I would often go buy the CLE, we have a CLE publisher that is basically practice-wise; they would have estate planning books and binders that would keep you up to date on current laws and the best practices. So, I would start by getting copies of those templates and forms and different provisions and different clauses that you can mix and match. And I would take that documentation back to my home office, and then I'd try to figure out, okay, how am I going to create a trust from all of this? And so, eventually, I came up with sets of forms that were starting places for different types of estate plans.

And I might have 5 to 10 different types just as jumping off spots, and then everyone's customized from there. Well, so I thought, this is just taking an incredible amount of time, and the value for the client is not in paying for my time. I really wanted to do a flat fee procedure so that I would be able to quote the fee once I knew the complexity and the basic design. I wanted to be able to quote that fee so the client would know what it's going to cost, rather than hitting them with a bill later for 20, 25, 30 hours of my time and getting all this together.

So, in streamlining my practice, I decided I needed to come up with a way to assemble documents. And so I started using HotDocs. That was when I was using a Windows-based PC, and HotDocs was an add-on, an app you could put in, and that was how it worked. I would create the templates with variables. I believe they were bracketed at the time. And it was kind of like a, Word does have a process for this too. It's, I believe, called merge codes or something like that.

John: Yeah, mail merge or merge codes. Yeah.

Laura: Mail merge. Yeah. Eventually, I switched to a program called Pythagoras for doc assembly, document assembly. And that was started by a wonderful gentleman on the East Coast who just loved doing coding. And he was an attorney who loved doing coding. And I found Pythagoras much easier to use than HotDocs. But it was Windows-based. You had to have Word for Windows. So since I've switched to Mac and I was on Parallels, Parallels was glitchy. I was just like, you know, after struggling with that for a while, I thought, I've got to come up with something better that will be cloud-based that I can use on Mac.

So as I started researching this around, hmm, 5 years ago, 10 years ago, I came across open-source software called Docassemble, and it's a code that is, as I say, open source, which means that any developer could learn how to use it, download it, put it on a server, and it's not that expensive to run. You don't have to have a subscription to it. That was appealing to me, not having to worry about having somebody else run it and fix the glitches. I would own the glitches if there were glitches; it was my fault, you know.

John: No, I know a lot of lawyers who have paid a lot of money to some friends of mine who are consultants in different, different elements of HotDocs support, things like that. So, you can go very deep into your wallet to support those things.

Laura: Well, and I did too. And it was frustrating because I was still having trouble with both. Every time I switched, there was a reason, and it was just because it was becoming unwieldy. But every time I iterated, it got better. Each time I would change to a different program, it was getting better. My time drafting got quicker. And when you have a program like Docassemble that allows for contingent clauses where you can say, if they're married, then use this paragraph that talks about we instead of he or she or one person. So, having plural instead of singular and having provisions for if there are children, then would you like a child's trust or not? These kinds of decision trees were more possible with a program like Docassemble.

John: And it sounds like at that point you were testing different options to see what would actually fit your workflow.

Laura: That is an option for both programs, but I have not implemented that yet. And I know there are a lot of firms are playing around with intakes to say, okay, you would like to have a consult with us. Here are some forms that you can fill in, some questions you can answer in advance.

I've always found that initial intake is best done face-to-face, and I'd rather take the notes myself because I find that I could draft a very complicated intake form that has branches and that moves off in different directions, but if I'm doing the intake myself, I'd rather let the questions direct the journey, so to speak. You know, whatever the answers are, I may have other questions that I want to follow up on, and an intake form may or may not always help with that. And I do have an executive assistant. Yes, she's a virtual assistant, but she doesn't do client intake. I still do that myself.

John: Yeah, it's interesting when you have the, the client-facing stuff. It'll be interesting to see the extent to which this might change or evolve with generative AI and all the stuff. But it's hard to find that Goldilocks zone. It's easy to be either underinclusive or over, you know, you don't want people to have to fill out a longer form than necessary because their eyes are going to roll back in their heads, and they may not do it, right? That's the other problem from a, like a client homework, and I talk about client homework bottlenecks all the time, right? You want it to be fast, but you also want it to be accurate. You want it to be complete, and anything that the client does that isn't that combination of things, it means you're going to have to go back to them at some point.

Laura: That's really true. So, as an example, I recently was working with a client who's helping his sister, and his sister is starting to get dementia, and he is the trustee for his sister's trust. So he's trying to make sure she's protected from scams, make sure that all of the accounts are in the trust, and things like this. Well, so when he initially reached out to me, it was through another client of mine who referred him. So he wasn't in my inner circle himself, but I'm like, well, this is exactly the kind of case I would like to take on. So, I directed him to my calendar, and I'm using a similar system to you. I use Acuity, and it's very similar to Calendly. This calendar program has really changed my life. I love these calendar programs, and I'm finding more and more doctors, dentists, and medical professionals are using them. People who do other personal services are using them. And so there's no reason why attorneys shouldn't be using them as well. And it helps to solve the intake problem. And that intake has been so valuable so that I don't have to have a pre-call before the consult. It's been great.

John: Straightforward things that no real skin off anyone's nose to answer a few questions, especially at that moment where they're getting the thing they want, which is time with you, right, the scheduler. So there's, there's an exchange of value there. You're meeting one of their needs, albeit through the technology, and they're meeting one of your needs, which is being able to make that conversation a little bit more effective, get to the point a little faster, as opposed to the getting that basic information. That all makes perfect sense to me.

I'm an Acuity user too. I know a lot of folks use Calendly and others, and you know, more and more of the various practice management tools are building those, you know, scheduling systems in because they're so revolutionary. So I think it's definitely becoming more and more the norm, which I think is great.

Laura: One other comment about Acuity, how it's helped me is that you can set up in all these programs, you can set up reminders, whether it's by text or email. And the reminders have solved a big problem for me because I used to set aside time every afternoon to make a phone call or send an email to say, "Remember, we have a meeting tomorrow." I don't have to do that anymore because the system sends the email to confirm, yes, you made an appointment, would you like to add it to your calendar right now? Done.

Then, about four days before the meeting, they send another one that says, "Reminder, we have a meeting. Do you need to change it? If so, there's a button to do that." And then a day before and an hour before. So what happens then is that Zoom link is at the top of their inbox an hour before we meet, and I rarely get cancellations. I rarely get no-shows. It's really transformed my ability to focus on what's in front of me that day instead of worrying about the next day, just whether the client will even show up. So I don't have to hire a person to do that, and I don't have to do it myself, which is what I used to do. So it's such an incredible value. I just can't emphasize that enough. For new solos starting out, it replaces probably half of a full-time worker. It's a part-time worker that you're replacing when you get calendar software.

John: Yeah, for sure. Yeah.

Laure: It's amazing.

John: Well, so you graduated or evolved, is maybe the better word. And you started to talk about this a minute ago, and I cut you off, but I want to come back now. So you used document automation, certainly in your estate planning world. I think you're increasingly using it from a prior conversation that we had in your post-death administration world, but you also have created what I think of as a productized legal service using document automation. And so I'd love for you to talk a little bit about Scholar Shield and your journey into using technology to basically solve at least a significant percentage of a client or a potential client need without you even having to do the work.

Laura: Yeah, this is, in a way, it's an access to legal services issue. It's providing access to people who might not hire an attorney. But Scholar Shield legal documents was really born from a personal problem that I had. And that was when that baby who I stopped working at the law firm to start my own firm so I could be home with him, when he went off to college, he actually went to the University of Minnesota, Go Gophers.

And I got a call from his roommate. And the roommate says, "Oh, Mrs. Patton." Mrs. Patton, I was like, "Oh, uh oh, something's bad, something's bad. Something bad has happened." He says, "Mrs. Patton, we are in the emergency room with your son. He's unconscious. And he fell and he hurt his head on the edge of the dorm bed, which is made of metal."

And I said, "You're in the emergency room right now with him?" "Yes." "Well, can you please hand the phone to the doctor who's right there with you?" "Yes." They hand the phone to the doctor, and the doctor says to me, "Are you the parent?" I said, "Yes." And he said, "Your son is over 18." And I said, "Yes." He said, "Your son doesn't have a power of attorney here. Unless you've got one, I cannot speak with you about his condition." And the doctor basically hung up on me. And I was absolutely floored. I was frightened, I was freaking out, my heart was beating, I was sweating, I was just out of my mind.

I had no idea what had happened. Has my son got brain damage? Is he, does he have a concussion? Is he going to be in a coma? Like, what is going on? So, of course, I'm calling back the roommate to get as much information as I can. But in the meantime, I felt very embarrassed and humiliated that I had served as an estate planning attorney for the prior 17 years, and I didn't bother to get my own son a power of attorney when he turned 18. So, that was a kind of a moment of wow, the cobbler's children have no shoes. My own children don't have powers of attorney when they turn 18. This is bad. So, not only did I solve that problem quickly, and yeah, my son, he actually recovered. He's fine. He became a chemical engineer. He's doing great. So, I'm very proud of him. But at the moment, it was horrific. And I thought, if I can solve this problem for other parents, I'd like to.

So, every time I'd meet with parents of minor children, I would say, "When your child turns 18, call me. We need to get documents for them." So they would remember that, and they would do that when the son or daughter would turn 18, I'd get these calls and I'd say, "Oh, let's take care of this."

So then I realized, okay, what have I set myself up for? Now I have this problem of helping the parents, but it takes a lot of my time to do. And at 18-year-olds, probably, you know, most of them don't need a will. They don't really have any assets. They might have a bank account, but usually mom or dad are on the bank account. So they don't need a will, they don't need a trust, they don't have a house. They don't have a big investment account typically, right? So, what do they really need?

They need a power of attorney for finances in case they're really sick or hurt, like my son was. And they need an advance directive for medical care to appoint their parent or a close relative to speak for them if they're ever in the emergency room, like my son was. Those are really the 2 key documents. That's the most simple basic estate plan there is, and that's what 18-year-olds need all over our country, right?

Well, I thought, okay, I can prepare these documents, but I need to talk to the 18-year-old about it. I need to talk to the parents about it. I need to draft the documents. I need to meet with them to sign everything before a notary. And then I need to share with them what to do with the documents after they have them signed in their possession.

So, all of this takes about 2 to 3 hours of attorney time, sometimes more. And I didn't feel comfortable charging 3 hours of attorney time for the work. So, it became a loss leader in a way. It became a pro bono project. I would do it because they needed it. But I wanted to figure out a way where I could get myself out of the middle of preparing very simple plans like that, because for the most part, I'm not changing or customizing those documents. That is a document where we're using the statutory form. Yes, I have some really great clauses in there that are customized for young adults, but it's not that, you know, one 18-year-old is going to have a very different document than another one. So I thought, let's make this a template that can be done online, similar to how Acuity asks those intake questions.

So that's where Docassemble came in to play. And so, working with Quentin and his team, we created a very sophisticated way to allow a parent to go to the website. They walk through very simple questions. Takes about 10, 15 minutes or less to answer those questions. Who's going to be the person for health care? Who's going to be the person for finances? Is there going to be a secondary for each of those? What are their names, addresses, emails, phone numbers? And how do we want to spell your child's name with a middle initial or not? How does their photo ID look? Just sort of walking through, how do we do this correctly the first time? Look it over. Are you happy with your answers? If so, I can then review those answers and turn around the document in a couple of days.

And I can actually turn that around in less than an hour, but I want to give myself extra time in case they made a mistake. I want to review their answers, and I want to review the document as it's output from Docassemble before it goes out to the client. But if I actually did nothing, then we've got it set up in such a way that it will flow out to the client in 2 business days. And that is a PDF, and then they can print it out. It has instructions on it.

And what's so sweet about this is that it's a system where, by going to the website, they're walking through all of the education that I would have given them in meetings. So we're including the information they need to understand what they're signing, to get it done, and then know what to do when it's over, because with the email when they receive the PDF, it has a very clear, you know, here's this three step process, print it out, take it to the UPS store or any notary of your choice, keep the copies in a certain spot, share copies with your roommate if you're in college, you want to have your roommate know who your contacts are and where those papers are just in case. And so this has been a way for me to provide this for my own clients who have college-age kids. And that's why I developed it. But I realized that it serves a bigger purpose. And that is that their friends also need the same because they would come to me and they'd say, "Well, all the kids in my son's senior class need this too." I'm like, "Well, okay. I mean, feel free to share the website." And so other people will take advantage of that too.

So I didn't have to charge 3 hours of my time, which might be well more than $1,000. I could charge a few hundred dollars, still provide a great value, high-quality, custom professional documents that serve the exact need of that niche.

And then what I discovered when I talked to other attorneys about this is that estate planning attorneys would say to me, "You know, I've got some college-age parents who treat one of their children a little differently than the other because one has special needs, or one is getting money from grandma and the other's not. We're going to be tweaking our estate plans so that we're not going to be treating them equally."

So the attorney says, "I have a conflict of interest representing the child. I don't want to prepare their powers of attorney when they turn 18 because I don't feel like I have a true lack of conflict of interest. And if I wanted to represent the children," these attorneys would say to me, and I had this issue sometimes too, and they'd say, "Well, now I've got to talk to the kids, I've got to talk to the parents, I got to get the parents to sign a conflict of interest waiver form."

John: Yeah, which is all of that cognitive load is more than they want to invest, regardless of the money around it. Yeah.

Laura: So much paperwork. Yeah, and then they'd still have to charge them, you know, several hundred dollars if not twelve hundred dollars or more. And so these estate planning attorneys are saying, "Well, hey, you know, if I can send my clients to your website, you're not stealing my clients. You're just helping their kids. You're just helping them get the documents that their kids need. And this is a way that the attorneys can then feel comfortable that their families are being well served, and they can still represent the parents and not have to worry about splitting their loyalties…

John: Right.

Laura: …you know, between parents and kids.

John: Yeah, I love all of it. I mean, for one, serving a community, an important community need, and as someone who has a college freshman and I'm actually even hearing you talk, I saw him last weekend and I'm kicking myself because one of the things I meant to do was have the documents for him and, you know, life happens. So maybe I'll be a Scholar Shield client here in the next week or two, but…

Laura: Well, I understand you're in Oregon, though.

John: I know, right. That's the difference.

Laura: I'm only licensed in California, so my documents are based on California law.

John: Yeah.

Laura: So, unfortunately, you have to be a California resident to take advantage.

John: Right.

Laura: But if your son or daughter goes outside of California, but your residence is in California, it works just fine.

John: It works. Got it. Okay. Well, I will find someone locally, or I will…

Laura: But I think, you know, wouldn't it be fun if we could find some Oregon attorney who would like to work with me, and then we could do the same for Oregon documents?

John: Well, I think that's right, or any state, frankly, right? I mean, if you're listening and this is something that you're interested in, reach out to Laura, I think.

Laura: Yeah. I'm interested because I think that this is something that could really serve a huge need. I feel that it creates a problem where if people don't have these documents in place when their kids leave home, or even if they are living at home, and they get in a car accident…

John: Sure. Yeah. Same issue.

Laura: …right in your own community, you can't talk to your doc, to the doctor.

John: Right. Well, and they don't have to be college students yet. They could be an old senior in high school, and you could be in that same issue.

Laura: You're right. You're absolutely right. So I think it's something that is part of adulting, honestly. It's one of those life passages. We get our driver's license, we get our vote, we register to vote, we learn about how to become an adult.

John: And I don't know if this has changed because I only have boys, but if you get that selective service notice in the mail, get your power of attorneys set up too.

Laura: I love that. I think that's one of those things that we need to help our kids with. And, and I think that one of the other things that I'm sharing with parents is things like scams, identity theft, what is a credit record? All these things that young people kind of need to know. And so this is one of those checklist items that we want to make sure, you know, how do you do laundry without mixing the red in with the white?

John: Yes.

Laura: You know, do you have your power of attorney? Where is it? Does your housemates know, do all the housemates know each other's contact information for emergencies? That, you know, all needs to be in their phones. The mother and the father.

John: Yeah, I was gonna say, because it is, nobody knows any phone numbers anyway anymore.

Laura: Exactly.

John: So, another big change from the 90s.

Laura: Yeah, so anyway, I see this as a little bit of a, I mean, it could end up growing to be more of a community for parents who are helping their kids with that transition into adulthood because there's a lot that our kids are going through as they're leaving the nest, so to speak.

And even those kids who are still in the nest, they usually do want their parents to stay involved, and they want their parents to be able to help them with their medications if they have an ongoing issue, and all the things. So yeah, I think it could be something that could go national, but for now, it's just a little niche business, but without a document assembly program, it wouldn't have been possible.

John: Yeah.

Laura: And so.

John: The technology needs to be there…

Laura: Yeah.

John: …to give you the efficiencies of scale and the other thing, and we're running short of time, and we need to wrap up, but I want to hit on the part you said, which is you're using the messaging and the interview itself to really educate the client or the potential client, right? And I think that's the key.

And so a while ago, I asked, what are you doing to help continue to fill that caregiver role? And part of it is that there is so much of you, I think, built into the caregiving around the quality of the information and even the phrasing of the questions, because if people don't have good context, they're not going to give you good answers, or they might make false assumptions about what you're looking for or any number of things.

And I know I've seen time and again with clients I've worked with, examples that I've seen that people really focus on getting the documents right, but in some ways, getting the interview and the messaging right is even more important. Not that we don't want the documents right too, but the quality of the client experience that the client's not in a good position to evaluate the quality of your legal document, but they're in a very good position to evaluate the quality of their experience doing the intake.

Laura: That's a good point. And I think the intake sets the expectation, and then taking them through a very simple process of, here's why we're asking for this information, and when you choose who's going to be your first medical agent, that person will be able to speak with the doctor, so choose someone who you feel comfortable would handle that role well.

And so we're explaining as we go through the procedure, and it's something that we had to play with a lot, testing it and saying, gosh, this doesn't flow quite right. Let's make the language more simple. Let's not have as much legalese in there. Let's explain a little bit about what a power of attorney really is and what it's for.

Let's explain what you do with the document afterward, and then reiterate that when they get the final product in their email. And then in the document package itself, it has a cover sheet that says, "Congratulations, you did a wonderful thing. Here are your 3 steps to finalize, and if you have questions, reach out. Here's our email." And, you know, I'm here for support, of course, as needed. So it feels like somebody's getting personalized help from an attorney, even though it's technically not necessarily advice. I'm not giving legal advice. Like you said.

John: Right, it's just process navigation.

Laura: It's a productized legal service, but it is a document that you're buying. It's not really calling me and saying, "Hey, will you represent me?" because I'm not representing them.

John: Yeah, so they benefit from your knowledge, your experience, your care, but not your individualized advice.

Laura: Correct.

John: And for this population, they don't need it for the most part. Again, maybe if there's special needs or other things, then you're going to break in and say, we maybe need to go a little deeper here, but…

Laura: Right.

John: No, that all makes perfect sense. I love it.

Laura: Yeah, and I am playing around with the idea of adding video here and there. But I'm working on this. A lot of us have struggled with feeling comfortable on video, and I'm working on it so that maybe I can have a video at the beginning, have a video at the end that will feel even more personalized for people, because I think that folks are looking for connection. They're looking for somebody they can trust. And I think that's something that I might be considering doing in the future is trying to put a little bit more video personal touch into the process.

So that's something I'm working on. But I think that anybody who's in a legal niche where they see a particular issue that's taking a lot of their time, but they can't bill for that value, there's probably a solution that's something like what I just did with this.

John: Absolutely. Yeah, and I see it at different parts. That might be a paid consult on the front end, or there can be some other information projects. Depending on, there are some legal services, legal aid type organizations that are doing more sort of phased flat fee or something. And so it could be information at different phases of a case. It doesn't matter.

If it's things that you find yourself doing kind of over and over again, there might be ways to use technology and use other tools to help have to do it less. I'm not saying you're going to get out of it entirely, but you can talk with my consulting clients about, let's figure out what parts of your practice are sheet music and what parts of it are jazz solos. Let's be able to commit that sheet music to actually writing it down. And then we can put it in the player piano, which is a very old-fashioned reference, but we know that it's going to get played the same way every time. That gets you not just efficiency, that gets you consistency and quality as well.

Laura: I love that. I love that. No, you're right. And one other thing that's happening with this process is I realized that as more people use it and share it with their friends and share it, even college advisors are picking up on it and sharing it with their kids. I thought, well, gosh, I need to ask for testimonials. I need to ask for a review. So, I'm trying to figure out how to automate that so that after someone completes the process that, you know, there's an appropriate pause, and then that email address gets entered into an email sequence that basically says, "We'd really appreciate your review because we want to help more people. Would you be willing to give us a review?" And so that's happening. And then once they say yes we would, I'd be happy to review it, then I send them a review link. But one review link doesn't seem to work. People need to be reminded to actually use that review link. So there's two sequences going on, requesting a review, and then here's the link.

John: I feel like that's such a smart, simple way to keep it personal even as you automate. We're out of time. I know you're also a Kanban board user, and it's amazing that we've just gone for 40-some minutes and not talked about Kanban with me, but we'll have to save that for another time.

So, Laura, thanks so much for coming on and talking about your journey and your product, and hopefully, folks have some inspiration and ways that you can sort of harness these things. You don't need necessarily the top-end Cadillac systems and in some ways, certainly, it's been the experience of a lot of other attorneys that I work with that tools like Docassemble that are incredibly powerful but relatively straightforward may be work even better than some of the specific built into the law practice management or for attorneys versions of some of these tools. So.

Laura: That's awesome. Thank you very much for having me, John. It's been a pleasure. Maybe we can do it again.

John: We'll talk again soon. Okay.

Laura: Thanks.

John: All right. So I love how Laura's story brings together so many of the themes that I talk about on this show. Innovation and access to justice, of course, but doing it while keeping that essential human touch.

A few takeaways for you to think about. Number one, your most meaningful innovations often start with a personal problem, right? Scratch your own itch. So when you solve something that matters to you or someone close to you, you're much more likely to create something that's going to resonate with others as well.

Number two, there's always a risk that when you hand parts of your practice over to technology tools, your client experience could feel less personal. But it doesn't have to be that way. When done well, harnessing technology can actually give you the space to show up more fully for the human parts of your work.

Number three, there is incredible potential in productizing even a small part of your expertise. If you find yourself doing the same thing over and over or getting asked for the same thing repeatedly, there's probably a way to systematize it, streamline it, and package it. And then extend your impact by having that productized service.

All right, that's it for today. If you've found this conversation helpful, please share it with a colleague or leave a review on Apple Podcasts or Spotify. It really does help others find the show. And while this episode was mainly about document automation, I know from experience that using the right tool to use your Matter workflows and balance your commitments against your team's capacity can be one of the best ways to ensure that you're showing up when it matters most and delivering that outstanding client experience.

And if you'd like to see how my software tool, Greenline, can help you do that, head on over to greenline.legal and click the "Book a Demo" button to get on our list.

As always, this podcast gets production support from the fantastic team over at Digital Freedom Productions, and our theme music is Hello by Lunara. Thanks for listening, and I'll catch you again next week.