

# AUTTO.



## CASE STUDY

# Burges Salmon

## Exploring and Executing Automation for Innovation in Legal Services

AUTTO has been working with independent UK law firm Burges Salmon as part of its 'B-Innovative Week' to challenge a group of trainees to develop a prototype automation or app that could be of direct value to clients. The results show some very interesting outcomes for the legal sector...



**CUSTOMER**  
Burges Salmon

**WEBSITE**  
[www.burges-salmon.com](http://www.burges-salmon.com)

**NO. OF EMPLOYEES**  
800+

**COUNTRY OR REGION**  
United Kingdom

**INDUSTRY**  
Legal

**CUSTOMER PROFILE**  
Burges Salmon is an independent UK law firm and Legal Week's UK Law Firm of the Year 2020



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**Jason Francis**  
Trainee Solicitor  
Part of the team that  
created the CMI Wizard

# THE CHALLENGE

Burges Salmon, Legal Week's UK Law Firm of the Year 2020, strongly believes in the importance of identifying new technology to improve client service and delivery. As part of this, the annual 'B-Innovative Week' brings together people from across the firm to explore and be inspired by the latest technologies and approaches.

In January this year the firm hosted its third event boasting a packed programme of webinars, workshops and challenges for its 800 plus lawyers and business services professionals. One such event, led by the Burges Salmon's Innovation team, set a challenge to 37 of the firm's trainees. They were charged with identifying where they could innovate processes to directly or indirectly support client service. Using AUTTO, a no-code automation tool, they were then tasked to create a prototype automation or app to achieve this.



**Alex Knowles-Smith**  
Solicitor

Divided into nine teams, the trainees attended a series of sessions including a practical workshop to learn how easy it is to use the AUTTO platform. Here they were presented with an example tool that a previous Burges Salmon trainee, Alex Knowles-Smith (now qualified and in the Pensions team), had created using AUTTO. In 2020 Alex was finishing his traineeship with a seat in the Innovation team. One of his assignments had been to trial AUTTO to see how easy it was to create useful tools and he came up with an automated NDA tool. It took Alex, a history graduate, just one afternoon to navigate the AUTTO system and develop this tool and he was keen to communicate this to others around the firm.

Armed with their knowledge of the platform, full access to the product and inspiration from the previous work done by Alex, the teams agreed to meet back in three weeks to present their working models. The best ideas would be collated and then voted on with an overall 'winner' decided by Richard Read, Burges Salmon Executive Committee partner with responsibility for advanced technology innovation.

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# THE RESULTS

Commenting on the initial creations, Read observed “how tremendously innovative and imaginative each of the ideas presented was. It was fantastic to see how the trainees used their experience in the seats they had had so far to spot things that could be done more efficiently.” All nine creations fitted the brief of benefitting clients either directly or indirectly and merits included:

### IMPROVEMENTS IN EFFICIENCY

This was a common theme and was demonstrated well by ‘B-Complete’ - a post completion app. Intended to save time in the completion process, the app would automatically (and in under one minute) set deadlines and generate diary reminders of the key dates for filing, registration and mail-outs. The team emphasised how the app was designed to be used across the firm in different departments.

A client workflow tool developed to fill in Lasting Power of Attorney (LPA) forms was another great example of how using AUTTO can improve efficiency. The team explained the problem they identified: “This 24 page document can be lengthy to fill in, with a number of repetitions. Obtaining all the correct information can be a time-intensive process.” Using AUTTO business process tools, the team created a simple, interactive questionnaire to be filled in with key information which automatically created an LPA form to be reviewed and signed off by the legal team before returning to the Office of Public Guardian.

### CLEAR, QUICK AND EASY PRESENTATION OF LEGAL INFORMATION TO CLIENTS

A Compulsory Purchase Order Q&A-based advice workflow tool was created for use in the Planning department. It demonstrated how simply and efficiently advice could be given to clients facing a CPO. An Environmental Reporting Tool created a simple questionnaire to streamline and present appropriate advice to corporate clients on which environmental and climate reporting requirements may apply to it.

### SCHEDULING COURT DEADLINES

The ‘Date Sheriff’ drew on the team’s direct experience of booking and diarising court deadlines and created an app to simplify and assist colleagues in this task.

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### INTERNAL WORKFLOW CHALLENGES MET

AUTTO was also utilised to help address behind-the-scenes workflow challenges. A staff wellness app accessible through Burgess Salmon's intranet used a questionnaire-based workflow to provide a tailored out-of-hours support, information and action resource to staff. With staff wellness being a key focus for the firm, this was greeted with particular appreciation.

It was the 'CMI Wizard' that created the most interest and ended up being the overall winner of the challenge. Seen as the most workable proposition offering the most value to clients, it created workflows to automate the paperwork required for client and matter inception, whether taking on new clients or opening new instructions for existing clients. The team created the app to include an automatic generation of a draft engagement letter for review by the involved team, activation of emails to remind the team of deadlines and details required from the client for the due diligence process.

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# POST-PROJECT THOUGHTS

Although the CMI Wizard was the overall winner, the output of all nine teams was acknowledged by the judging panel. Richard Read enthused: “If this is a sign of the interest in innovative service delivery for Burgess Salmon’s clients, then the firm is in safe hands.”

Ian Gosling, founder and CEO of AUTTO, added: “What a fantastic set of examples. I am so impressed with how the trainees considered all parts of the firm’s business and then applied the functions of AUTTO – business, knowledge and document automation. They looked at internal structures, value added advice-based workflows for clients and operational processes like the generation of key documents. They were truly demonstrating AUTTO’s goal of replacing time with tech.”

But how easy did the trainees find using AUTTO? All were graduates of various subjects but none came from a pure technology background and they were given just an afternoon to walk their way around the AUTTO system.

Jason Francis, a 2nd year trainee and part of the team that created the CMI Wizard, explained: “Nobody in our team had any experience of coding so we were a little apprehensive to start with on this project. However, AUTTO really is a very intuitive tool - large aspects of it are a simple drag and drop so we were able to build an application in a short space of time. We were also all really impressed with how much data you could plug into it, whether internally from Burgess Salmon or externally from say Companies House.”

“There are some really powerful features built into the AUTTO platform.”

Ebony Ezekwesili, a 2nd year trainee on the team who developed the advice application for clients involved in a CPO, added: “AUTTO’s ‘no-code automation’ slogan really does ring true. Within minutes of using the platform we were able to start to project our ideas onto it, designing workflows and generating applications that were practical and easy to follow.” Asked where they saw technologies such as AUTTO fitting in to the future of the firm, both the trainees were emphatic: “Embracing technology can help to improve working practice and tools like AUTTO can improve efficiency by reducing time lawyers spend on doing things they ideally shouldn’t be doing, giving them back time to do what they do best for clients – really understanding what they need and providing quality legal advice,” explained Ebony.

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Jason added: “Automation has the potential to remove the admin burden to free up lawyers’ time to add value on other things. I encourage my colleagues in the industry who are perhaps a little resistant to tech to get involved with using platforms like AUTTO to see what is possible. Our team took so much away just from collaborating and thinking differently about very routine processes.”

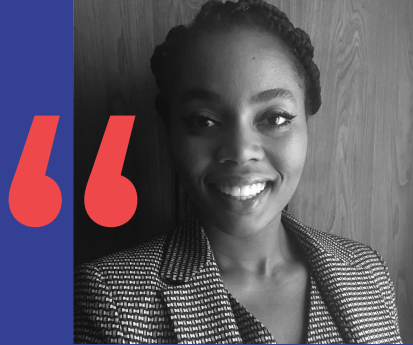
Ian Gosling observed: “It’s impressive how fast the trainees picked up how to use AUTTO and arrived at a working prototype. It just shows the potential technology has to support frontline legal professionals!”



**Emma Sorrell**  
Innovation Manager

Innovation Manager and creator of the challenge Emma Sorrell gave the closing remarks: “Burgess Salmon knows the clients we serve are digitising and technologies like AUTTO are giving us the tools to adapt and meet changing client requirements. The power of a tool like AUTTO shows the success of combining subject matter experts with technology. This year’s AUTTO challenge has been a great opportunity to explore how best to combine the skills and experience of our lawyers, business professionals and our technologists. It was brilliant to see the variety of ideas generated, some of which overlap with initiatives the firm is already progressing but even where that was the case, the AUTTO challenge really helped to bring those ideas to life.”

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**Ebony Ezekwesili**

Trainee Solicitor

Part of the team who developed the advice application for clients involved in a CPO



## ABOUT AUTTO

AUTTO is a no-code automation platform that makes it easy for SMEs and professional services to rapidly deliver solutions to clients or colleagues using knowledge, business process and document automation.

Legal knowledge and advice is often repeated across departments and the broad spectrum of clients. Sometimes, you need to provide customers or colleagues with similar advice or guidance repeatedly. It's simple for you but difficult for everyone else because you are the expert. So you keep answering the same questions in small but significant variations for different people. Knowledge automation is the best solution to this legal business challenge.

Running processes can be time-consuming and it's easy for things to get missed, especially when you are trying to manage data with nothing more than copy and pasting onto a spreadsheet and sending out endless emails! AUTTO simply automates these business processes for you, allowing for accuracy and consistency. We provide a no-code automation platform that is simple and easy to use. We understand your business process complexities and our goal is to help you save time, freeing you up to spend more time giving the best legal advice to your clients.

When routine documents need to be consistent and accurate, document automation takes care of their production, approval and sign off. Legal documents such as NDAs, contracts and forms are automated by creating workflows to lead the user into completing smooth-flowing forms or emails that ask different question types, to generate an easy to create but accurate document.