

A Step-by-Step Guide to

BUILDING AN AUTOMATED LEGAL FUNCTION

A Practical Roadmap to Digitize,
Streamline, and Future-Proof
Your Legal Operations



Transform Your Legal Department
from Operational Bottleneck to **Business Enabler**



A Step-by-Step Guide to Building an Automated Legal Function

About Beveron Technologies

Founded in 2014, **Beveron Technologies** is a leader in the **LegalTech** domain, specializing in providing innovative software solutions designed to automate and streamline legal operations. With a focus on delivering efficiency and quality, Beveron offers products such as:

- **Smart Lawyer Office**
- **Smart Legal Counsel**
- **Smart Debt Collection**

These solutions cater to law firms, corporate legal departments, and debt collection agencies, helping them improve their workflows and achieve greater operational effectiveness.

Leadership and Expertise

Beveron is led by **CEO Brijesh Chedayan**, a recognized author in the field of LegalTech. Brijesh's groundbreaking book on **LegalTech** is the first of its kind in the region, underscoring his commitment to advancing the legal technology sector.

Awards and Recognition

Beveron has received multiple accolades, including the **Best LegalTech Company Award** for its transformative impact on the legal industry. The company is also **ISO certified**, ensuring the highest standards of quality and security in its services and products.

Contributions to the Legal Community

Beveron is deeply committed to sharing its expertise and knowledge with the legal community. The company regularly publishes whitepapers and research articles on LegalTech trends, offering valuable insights into the evolving landscape of legal technology. Additionally, Beveron conducts webinars to engage with legal professionals and foster collaboration across the sector.

Contact Information

For more information, visit our website:

www.beveron.com



A Step-by-Step Guide to Building an Automated Legal Function

Introduction: Why Legal Automation Is No Longer Optional

For decades, the legal department was viewed as a cost center — a necessary but slow-moving function buried under contracts, compliance checklists, and endless email threads. Today, that perception is changing fast.



Businesses are scaling faster, regulations are multiplying across jurisdictions, and stakeholders expect legal teams to deliver answers in hours, not weeks. In this environment, manual processes simply cannot keep up. Spreadsheets, shared drives, and inbox-based contract tracking are no longer just inefficient — they are a genuine business risk.

Legal automation is the strategic response to this shift. It is the process of using technology — workflow engines, AI-powered contract analytics, e-signature integrations, and centralized repositories — to handle repetitive, rules-based legal work, freeing legal professionals to focus on judgment-intensive, high-value tasks.

This guide walks through exactly how organizations can build an automated legal function step by step, from assessment to full-scale digital transformation.

"Legal used to be the team everyone waited on. Now we're the team that keeps the business moving."

— **General Counsel, Global Manufacturing Enterprise**

Step 1: Audit Your Current Legal Workflows



A Step-by-Step Guide to Building an Automated Legal Function

Before automating anything, you need a clear picture of how work actually moves through your legal department today.

Key questions to answer:

- Where do contracts get stuck the longest — drafting, review, approval, or signature?
- How much time is spent searching for documents, precedents, or clause language?
- Which tasks are repetitive and rules-based (NDAs, vendor agreements, renewals)?
- Where do compliance risks tend to surface — missed deadlines, expired clauses, untracked obligations?

A thorough audit typically reveals that a large share of legal department time is consumed by administrative and repetitive tasks rather than strategic counsel. This is your automation opportunity map.

Step 2: Define Clear Objectives and Success Metrics

Automation without a target is just digitization. Before selecting tools, define what success looks like.

Common objectives include:

- Reducing average contract turnaround time
- Lowering legal spend on outside counsel for routine matters
- Improving compliance tracking and audit readiness
- Standardizing contract language and reducing negotiation cycles
- Increasing visibility for business stakeholders into legal status



Set baseline metrics now — turnaround time, error rates, contract volume per FTE — so you can measure ROI once automation is live.

Step 3: Map and Standardize Your Legal Processes

You cannot automate chaos. Before deploying any platform, legal processes need to be documented and standardized.

This involves:

A Step-by-Step Guide to Building an Automated Legal Function

- **Creating standard templates** for high-volume agreement types (NDAs, MSAs, employment contracts, vendor agreements)
- **Establishing clause libraries** with pre-approved, legally vetted language
- **Defining approval hierarchies** — who signs off at each stage, and under what conditions
- **Building decision trees** for risk thresholds (e.g., contracts above a certain value automatically route to senior counsel)

Process mapping is the unglamorous but essential foundation. Skipping this step is one of the most common reasons legal automation projects fail to deliver results.



Step 4: Choose the Right Technology Stack

Not every legal team needs the same tools. However, most automated legal functions rest on a few core technology pillars:

1. **Contract Lifecycle Management (CLM)** — centralizes drafting, negotiation, approval, and storage
2. **AI-Powered Contract Review** — flags risky clauses, missing terms, and deviations from playbooks
3. **E-Signature Integration** — closes the loop from approval to execution instantly
4. **Workflow & Approval Automation** — routes documents automatically based on predefined rules
5. **Centralized Legal Repository** — a single source of truth, searchable and audit-ready
6. **Compliance & Obligation Tracking** — automated alerts for renewals, deadlines, and regulatory changes

The right platform should unify these capabilities rather than forcing your team to stitch together disconnected point solutions.

Step 5: Start With High-Volume, Low-Complexity Workflows

Don't attempt to automate your most complex M&A agreements on day one. Build momentum and trust by starting with:

- NDA generation and approval
- Vendor and procurement agreements
- Employee onboarding documentation
- Routine renewals and amendments

A Step-by-Step Guide to Building an Automated Legal Function



- Auto-generate the relevant contract from an approved template
- Route it through pre-set approval workflows
- Flag any non-standard clauses for legal review
- Trigger e-signature and store the executed document automatically

This kind of integration transforms legal from a bottleneck into a business enabler.

"Once legal was plugged into the CRM, sales stopped seeing us as a roadblock. Contracts just... happened."

— VP of Legal, SaaS Company

Step 7: Build in Compliance and Risk Monitoring by Design

Automation isn't just about speed — it's about reducing risk. An automated legal function should continuously monitor:

- Contract expiration and renewal dates
- Regulatory changes affecting existing agreements
- Non-standard or high-risk clauses across the contract portfolio
- Audit trails for every approval, edit, and signature

Real-time dashboards and automated alerts help ensure nothing falls through the cracks — a meaningful advantage over manual tracking methods that rely on individual memory or calendar reminders.

These workflows are repetitive, rules-based, and high in volume — making them ideal candidates to demonstrate quick wins and build organizational confidence in automation.

Step 6: Integrate Legal Automation With the Rest of the Business

A legal function that operates in isolation creates friction. True automation means legal systems talk to the systems business teams already use — CRM, procurement, HR, and finance platforms.

When a sales team closes a deal in their CRM, an automated legal function should be able to:

A Step-by-Step Guide to Building an Automated Legal Function

Step 8: Train Your Team and Drive Adoption

The best technology fails without adoption. Legal automation succeeds when:

- Legal teams are trained not just on *how* to use new tools, but *why* the change matters
- Business stakeholders understand self-service options (e.g., generating their own NDAs from templates)
- Feedback loops are built in to continuously refine workflows and templates
- Leadership visibly champions the shift from manual to automated processes

Change management is often underestimated — yet it determines whether automation becomes embedded practice or shelfware.



Step 9: Measure, Optimize, and Scale

Automation is not a one-time project; it's an ongoing capability. Once initial workflows are live:

- Compare results against the baseline metrics defined in Step 2
- Identify new processes ready for automation
- Refine clause libraries and templates based on real negotiation data
- Use analytics to identify recurring risk patterns and address them proactively

Mature legal functions treat automation as a continuous improvement cycle, not a finished project.

The Business Case: What Automation Delivers

Organizations that successfully build automated legal functions typically report:

- **Faster contract cycle times** — turnaround reduced from weeks to days or hours
- **Lower legal costs** — less reliance on outside counsel for routine matters
- **Improved compliance posture** — fewer missed deadlines and audit gaps
- **Greater strategic capacity** — legal teams redirect time toward high-value advisory work
- **Enhanced visibility** — real-time dashboards give leadership clear insight into legal operations

In short, automation doesn't replace legal expertise — it amplifies it.

A Step-by-Step Guide to Building an Automated Legal Function

Bringing It All Together: The Beveron Smart Legal Counsel Advantage

Building an automated legal function step by step is a powerful strategy — but execution depends on having the right technology partner. This is where **Beveron Smart Legal Counsel** becomes a natural fit for organizations ready to make this transformation real.



- **Unified Contract Lifecycle Management** — draft, negotiate, approve, and store contracts in one centralized, secure platform
- **AI-Powered Risk and Clause Analysis** — automatically flag deviations from approved playbooks and highlight risk before it becomes a problem
- **Seamless Workflow Automation** — configurable approval routing tailored to your organization's hierarchy and risk thresholds
- **Built-In Compliance Monitoring** — automated alerts for renewals, obligations, and regulatory deadlines, keeping your legal function audit-ready at all times
- **Business System Integrations** — connect legal workflows directly with CRM, procurement, and HR platforms for true end-to-end automation
- **Real-Time Analytics and Dashboards** — give leadership the visibility needed to measure ROI and continuously optimize legal operations

Whether your organization is just beginning to digitize legal processes or looking to scale a mature automation strategy, Beveron Smart Legal Counsel provides the technology backbone to turn the steps in this guide into measurable business outcomes.

Beveron Smart Legal Counsel is designed to support every stage of the journey outlined in this guide:

A Step-by-Step Guide to Building an Automated Legal Function

The future of legal operations is automated, intelligent, and integrated — and with Beveron Smart Legal Counsel, that future is within reach today.

"Beveron gave us one place to manage contracts, track risk, and stay audit-ready. It paid for itself within the first quarter."

— **General Counsel, Mid-Market Enterprise**

Ready to transform your legal function?

Discover how Beveron Smart Legal Counsel can help your organization build a faster, smarter, and more resilient legal department.

[Book a Free Demo Today](#)

