

CHECKBOX

Lawyers can generate their own automation processes without having to code.



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Which practitioners would find this technology useful?

Lawyers at mid-size and larger firms, in-house counsel.

How does it work?

Checkbox is platform designed to enable lawyers to generate their own automation processes and services without having to learn how to code. It is a full automation suite combining document generation, workflow automation, forms, decision trees, data management and no-code development into a single, easy-to-use platform. With a “drag and drop” design method, users can digitise any number of processes, with the interface for creating tools designed to look like a flowchart. There are four main processes which can be created on Checkbox: intake and triage services; document automation; approval workflows; and expert systems or self-service advice. Some tools will be used internally by practitioners to improve efficiency, while others will be implemented to interact with or be used by clients.

At the back end, where you edit and design automated tools, the steps in the process or service being created are represented by boxes connected in a flowchart. To insert a new question, function, document or workflow into the tool being created, you drag and drop a new box into the flowchart and connect it with a line to the steps before and after.

A helpful feature in the design stage is that boxes in the flowchart will appear red when not correctly connected in the process or service being created, which alerts the user that it will not function as desired. When this is rectified, the box will appear green.

To demonstrate how you could create a document automation app consider the steps in automating an NDA. Each box in the flowchart you design would have a question which the client needs to answer. Their response would then be auto-filled into the NDA template you have uploaded into the system, creating a tailored document for the client. While some platforms already do this, there are several unique features to Checkbox.

First, it enables users to implement decision-tree logic into specific steps to re-direct workflows based on the answers selected or entered. In the case of the NDA example, a client who states the value of the contract is above, say, \$5 million could be directed to consult a lawyer, with a link appearing that sends them to fill out a contact form.

Second, you can integrate forms which access external data into an app. For example, an ABR search form can be inserted

into a questionnaire, which can be used to auto-fill a document.

Third, documents, forms and agreements can be taken directly from the platform across to Docusign, with in-built tags applied where action is required by the parties.

Checkbox does not aim to create brand new tools, but to empower practitioners to create bespoke applications which address their specific needs and purposes.

Benefits

Interface: The interface is simple to learn and relatively intuitive.

Customisation: Practitioners can quickly customise almost any aspect of a process or service being digitised, and can easily update process when necessary to reflect changes in law.

Multi-use: Unifies many products which other platforms offer separately, removing issues of data integration and simplifying use for practitioners.

Templates: Checkbox comes with a range of templates such as a copyright licence generator, a wills generator, and an assessment tool for unfair dismissal claims. These can be edited to suit the specifications of the user.

Dashboard: Provides a dashboard which can be customised to see the different processes and systems created and monitor trends in how they are used.

Integration: Can be connected with many practice management systems, e-signing platforms and other software.

Risks

Cyberisk, as with any cloud offering, is present as regards confidential and sensitive data moving beyond a firm’s internal systems. Checkbox data is hosted locally depending on the customer and encrypted in transit and at rest.

Costs

Starts at \$10,000 per annum and includes unlimited users, prototyping and usage.

Downsides

Probably needs to be a medium size business to make the most of its features and make it financially viable, as some effort is required to properly implement the system into a firm’s systems. ■

Peter Moran is a principal at Peer Legal and founder of the Steward Guide, an online technology guide for lawyers.

SNAPSHOT

What is Checkbox?

Full, no-code, legal automation suite

What type of technology?

Web-based application

Vendor

Checkbox

Country of origin

Australia

Similar tech products

Joseph, Smarter Drafter, Settify, Hot Docs, Practice management software with precedents that can be populated through in-built fields.

Non-tech alternatives

Lawyers, paralegals.

More information

www.checkbox.ai