Legal Commoditization:
How to Build Your Own Legal Product to Compete with LegalZoom
More and more legal services will be enabled by the support of new technology. You can say ‘that is for the technology industry to sort out,’ or you can be part of the technology industry.

- Richard Susskind
Agenda

- **Educate**: why automate?
- **Ethical Considerations**: what’s the law?
- **Plan**: practical advice on framework
- **Inspire**: real world examples
- **Do**: build your own workflow
Why did we start Documate?
Reach & impact.
New legal service models

Informational products

Internally, tech-assisted

Data collaboration

Subscription services

TurboTax for X / LegalZoom model

Package it up: Tech + Advice
ETHICS CONSIDERATIONS

What is the current state of the law on e-lawyering?
Unauthorized Practice of Law

• Legal information (generic and ) v. legal advice

• Unauthorized practice of law in either of two ways –
  • By providing legal services where the lawyer is not admitted or otherwise authorized to practice; and
  • By assisting a non-lawyer in conducting the practice of law
What disclaimers to use to prevent A-C relationship?

- Attorneys should use a “reasonably understandable, properly placed, and not misleading” warning or disclaimer that the site does not provide legal services.
Legal Tools & Ethical Considerations

Selling Online Legal Services
- Legal Form Providers
- Legal Service Providers
- LegalZoom cases
GETTING STARTED

Legal Product Life Cycle
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<th>Define Project</th>
<th>Due Diligence</th>
<th>Engage Users</th>
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PERSONAL PROPERTY MEMORANDUM

Welcome and thanks for visiting our free, do-it-yourself Personal Property Memorandum

Share your experience with us by leaving a review so we can make this tool better

Share with others by Liking and Sharing this page on social media so others can benefit from this as well. We believe in using the latest innovative technology for speed, efficiency, and value for our clients. To learn more about the Lawvex Difference click HERE.
Examples

Legal Help for Illinois Landlords
Our law firm takes the guesswork out of the "legal stuff" with an all-in-one platform. Unlimited attorney access, instant answers from the knowledge base, an ironclad lease, private community, on-demand learning, landlord forms, videos, courses, newsletter and more - $250 / year.

Get Access

Landlords need to get the "legal stuff" right, but there's a problem:

1. **Lawyers are expensive**
   Experienced real estate attorneys cost $250+ per hour. They bill you for everything - even a quick call.

2. **Gurus aren't experts**
   The internet is full of self-appointed legal scholars without the credentials or experience to back it up.

3. **The stakes are high**
   Today's Landlords face more uncertainty than ever. And increased pressure to get it right.
Examples

Goodbye fighting, hello divorce.

Membership Options

- **Starter Membership**
  - "Give me access to free resources to support me in my divorce."
  - FREE
  - Sign Up

- **DIY Divorce**
  - "Give me access to the Divorce Navigator so I can do my entire divorce online."
  - $99/month
  - Sign Up

- **Divorce Plus**
  - "Handle everything for me. (Prepare and file all of our divorce forms)."
  - $500/month
    - $3,000 payable at $500 per month for six months
  - Sign Up

- **Divorce with Benefits**
  - "Handle ALL of my divorce paperwork AND provide me with 2 hours of legal coaching."
  - $500/month
    - $3,500 payable at $500 per month for seven months
  - Sign Up
Examples

Business support services charged on a cost plus basis

For services such as:

- central support services (including finance and accounting services, tax and legal services, HR management services, IT support services, etc.);
- procurement services;
- logistics services;
- marketing services; and
- R&D services.

where the relevant services are charged for on a cost plus basis.

Start Questionnaire Now

Business support services charged on a cost plus basis (bilingual English / Chinese)

As for the questionnaire above, but produces a bilingual agreement (English and Chinese). (Professional translations into other languages are available upon request.)

Start Questionnaire Now

Why work with us?

World-leading legal expertise

We are the world-leading legal experts and educators on ICAs and related corporate structures.

We understand transfer pricing

No need to spend time teaching us and we complement, rather than compete with, transfer pricing advisors.

Bridging the tax-legal gap

We bridge the gap between tax and legal within the global transfer pricing community.
Step 1: Build your interview

Create questions to gather relevant data. Add complex branching logic to determine when to show or hide questions or pages.
**Step 2: Upload documents**

Upload your frequently used Word or PDF documents and forms, and tag them to your interview questions.
Fill out the workflow to generate your legal documents!

1. What is the client's name?*
   - Beyoncé Knowles

2. Describe the legal issue?*
   - Here's a description of my legal issue that I'd like populated in the appropriate places in my documents...

3. Which clauses do you want in your document?*
   - [✓] No brown M&M's clause
   - [ ] Nuclear non-proliferation clause
   - [ ] Standard legal clause A
   - [ ] None of the above

Step 3: Run the interview!

Run the workflow to assemble documents or send emails. Share it with clients or colleagues, embed it on your site, and measure analytics.
Let’s Build!

www.documate.org