



ARTICLE

TURNING THE DOCUMENT TRAIL DIGITAL



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Legal work runs on documents. Contracts, filings, discovery materials, client correspondence, and internal memos can all carry real consequences if mishandled. These might manifest themselves in a missed redline, a misplaced version, and/or a document that surfaces in discovery when it is non-responsive or privileged. Every one of these documents also has a lifecycle. Each must be drafted, reviewed, revised, signed, filed, and eventually retained or destroyed according to rules that will vary by matter type and jurisdiction. It rarely gets the same amount of attention, but managing that lifecycle well is as much a part of legal work as the analysis itself.

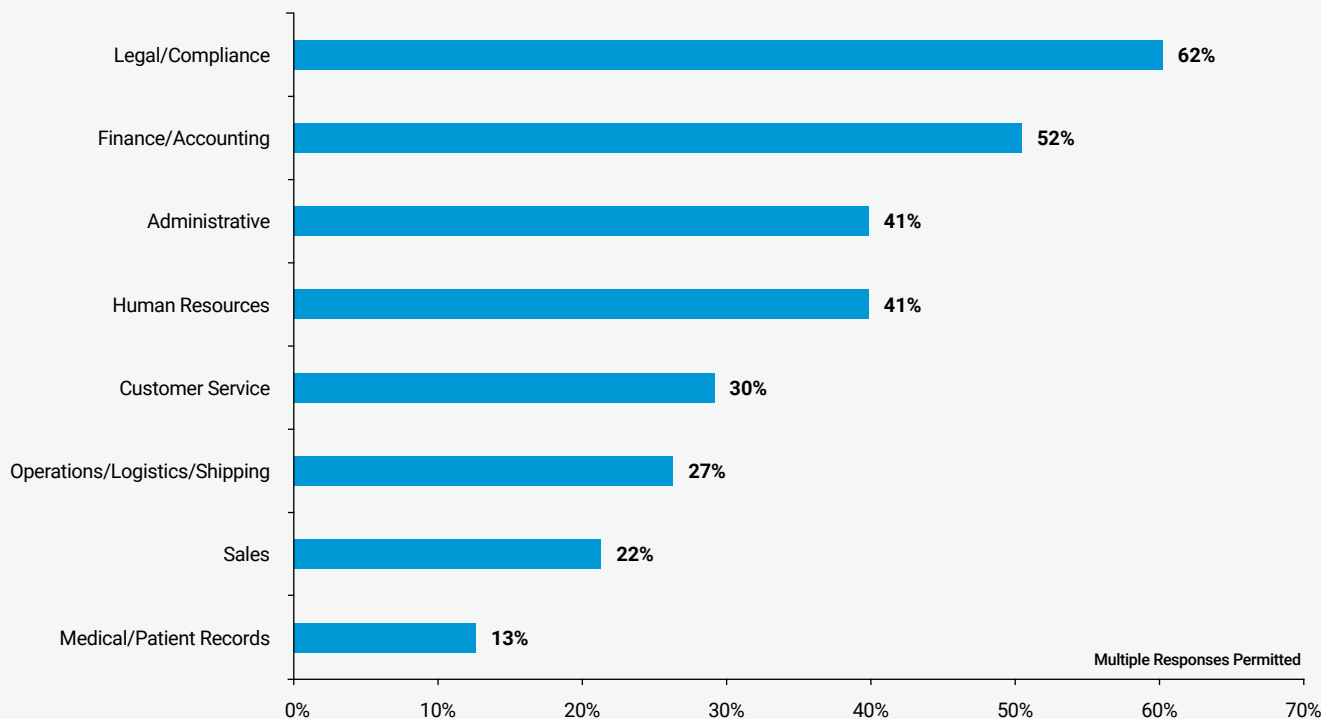
Digital transformation in a legal setting isn't about replacing legal judgment. It's about reducing operational friction around the document work that surrounds every matter, including the searching, routing, re-entering, and re-checking. When fee-earners spend time searching for misplaced drafts, tracking down approvals, or manually re-keying data, law firms can experience direct write downs, reduced realization rates, and billable hour leakage that may erode overall profitability. These tasks, though necessary, eat away at the time attorneys and staff members could otherwise spend on the work that actually requires their expertise.

Paper Remains Part of the Legal Workflow

In relation to other industries, legal work remains especially paper-bound. This is even true for legal organizations that have digitized most of their other operations. Keypoint Intelligence®'s research found that legal and compliance functions are named as the most paper-reliant department by about 62% of legal organizations, well above any other function measured in the same study. That gap is notable given how much other back-office work (e.g., finance, HR, customer service) has already moved to largely digital.¹

Figure 1: Departments That Rely Most on Paper-Based Workflows

Which of the following departments within your organization rely on paper-based workflows the most?



N = 42 Legal Respondents in the United States

Source: *Office Group Printing and Scanning Survey*; Keypoint Intelligence 2025

That concentration makes sense given the nature of legal work. Contracts require signatures and a clear version history that holds up if challenged later. Discovery materials often arrive as scanned papers from opposing counsel or third parties who haven't standardized their own document practices. Filings still carry formatting, certification, and notarization requirements in many jurisdictions that predate digital workflows entirely.

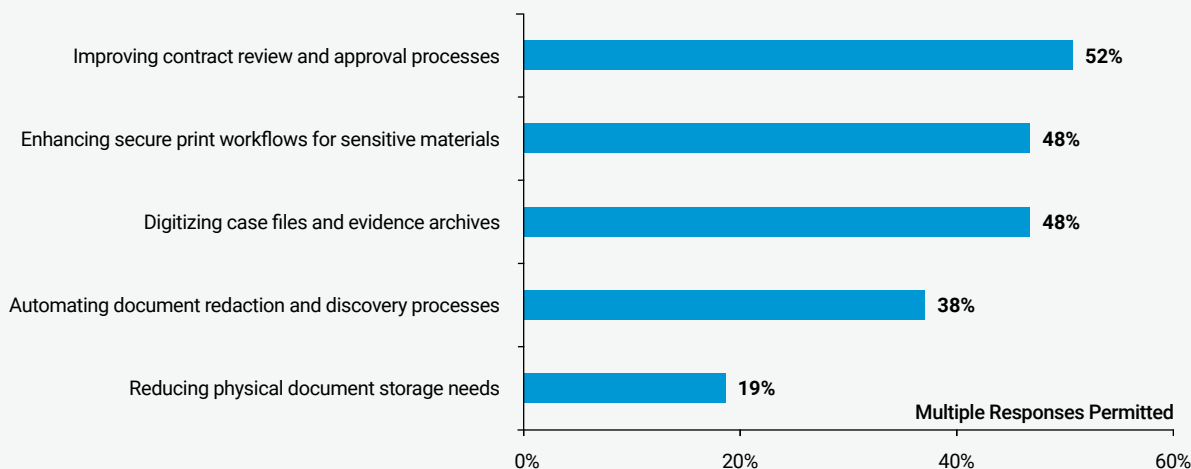
None of this is intended to suggest that legal teams are resisting modernization. It simply reflects how much legal work is inherently document-centric. These documents are commonly tied to formats and requirements that took shape long before digital tools existed, and they won't disappear just because a firm adopts new software.

Starting With Contract Workflows

When it comes to modernization efforts, not every document process offers the same return on investment. According to Keypoint Intelligence's research, improving contract review and approval processes is the top document workflow opportunity for 52% of legal organizations.¹ It ranks ahead of digitizing case files, enhancing secure print workflows, and automating redaction and discovery. It is especially worth noting that contract work outpaces even case file digitization as the area legal organizations see the most room to improve.

Figure 2: Top Document Workflow Opportunities

Which of the following areas within your legal practice offer the greatest opportunity for document automation or workflow improvements?



N = 50 Legal Respondents in the United States

Source: Digital Transformation IT Decision-Maker Survey; Keypoint Intelligence 2025

Contract workflows are a good place to start because they're high-volume, repetitive across matters, and painfully slow when handled manually. A contract routed by email, tracked in a spreadsheet, and approved through a chain of forwarded messages is easy to lose track of. A stakeholder might also miss the contract entirely if he or she is copied late or dropped off of a thread. When you multiply that across dozens or hundreds of active contracts, the time lost to simply tracking status becomes substantial.

A modernized contract workflow looks different in a few concrete ways. Every contract has a single current version that everyone works from, instead of competing copies with names like "final," "final v2," or even "finalreallyfinal." Status is visible without asking or emailing to verify. Anyone who needs to know where a contract stands, be it in drafting, internal review, client review, or signature, can see it. In addition, routing follows the matter automatically, moving to the next approver without relying on someone to remember to forward it.

Starting with contract workflows can give legal organizations a visible, measurable improvement prior to attempting to tackle less standardized document types. A cleaner contract workflow demonstrates value quickly and builds the case for extending similar improvements to other types of documents down the line.

Beyond Internal Efficiency

Most of the friction in legal document workflows happens out of a client's view. It might involve an internal version mix-up, a delayed internal approval, or a document routed to the wrong reviewer. Even so, clients feel the downstream effects even if they never see the cause. A contract that takes an extra week to finalize because it got stuck in an approval chain translates to the client as slow service, even though the delay had nothing to do with the legal analysis itself. An invoice that reflects hours spent tracking down a misplaced document is difficult to justify, and harder still to explain.

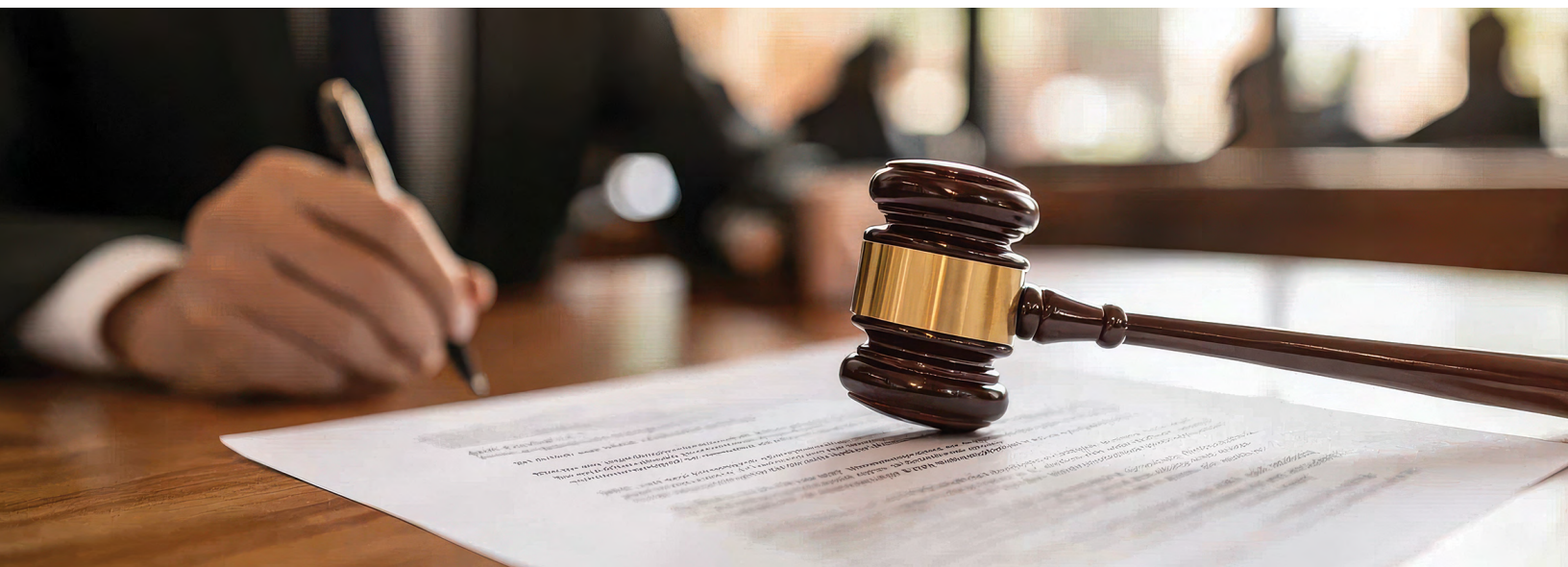
Document friction also erodes trust in more subtle ways. A client who receives two different versions of the same agreement, sent by two different people on the same matter, will reasonably wonder whether the team is coordinated. None of this reflects the quality of the legal work being done, but it does shape how that work is ultimately perceived.

Framing document workflow improvements around client experience, not just internal efficiency, can often make the case for investment more compelling to firm leadership. The potential efficiency gains are substantial, but the client relationship impact is what tends to get noticed first.

Getting Documents Out of Silos

Documents in a legal organization tend to scatter. Some live in email threads, others are on shared drives, some might be physical files in a cabinet down the hall, and still others are scanned copies saved locally on someone's laptop. That scattering creates real risk because two people might end up working from different versions of the same contract, each unaware that the other has made changes. More critically, unmanaged document silos can increase exposure to significant operational and legal risks—ranging from inadvertent privilege waivers when improper files are produced to spoliation of evidence issues during electronic discovery. A document that is central to a matter can sit in one attorney's inbox, invisible to the rest of the team working the case, and surfacing only when someone happens to ask the right person at the right time.

Attempting a firm-wide migration all at once can encounter significant operational challenges under its own scope because there are too many practice areas, too many document types, and too many exceptions to standardize in one pass. A more manageable approach centralizes one practice area or matter type at a time into a single system of record. Starting with the highest-volume or highest-risk practice area offers the clearest early payoff, and gives the organization a chance to work out access rules and naming conventions on a smaller scale before further expansions are made.





The Right Role for Automation

Automation has a clear role in legal document workflows, but it isn't a substitute for legal judgment. Redlining assistance, approval routing, and deadline tracking are strong candidates for automation because they're repetitive, rules-based, and free up attorney time without touching the substance of legal analysis. Reviewing the actual terms of a novel agreement, weighing risk in a negotiation, or exercising judgment on a discovery strategy is not something that any of these tools can or should attempt to replace.

The most repetitive, lowest-risk document tasks should be automated first. These include standard NDAs, routine intake forms, and/or common contract templates that rarely deviate from a known format. Expanding into more complex or higher-stakes matter types can come later, once the tools and the process have proven reliable on lower-risk work. This approach builds confidence gradually while limiting exposure if something needs adjustment along the way. A misconfigured rule on a routine NDA is a manageable administrative adjustment, but the same mistake on a high-value negotiation is not.

Managing Risk During the Transition

Version control, access permissions, and audit trails matter more in legal document work than they do in almost any other environment. A contract with an unclear revision history, or a discovery document accessed by someone outside the matter team, creates exposure that goes well beyond inconvenience. It can affect the outcome of a case or the enforceability of an agreement.

The stakes become clearest in the rare but serious cases where document history itself becomes the record under scrutiny, such as a malpractice claim, an ethics inquiry, a dispute over when a client was advised of something, or which version of a document a client actually signed. In those situations, a clear, timestamped audit trail showing who accessed, edited, and approved a document at what time can often help facilitate prompt resolution of factual disputes.

Establishing clear document ownership and access rules before—not after—migrating a practice area helps mitigate many of these issues from ever surfacing. Defining who can view, edit, and approve documents for a given matter, and setting that up before the first files move, is far easier than attempting to untangle access after the documents have already been scattered across a new system. A brief access review at the start of each new practice area's migration, confirming who actually needs access versus who's simply been granted it by default over time, can often turn up permissions that should have been revoked long ago.

Connecting the Threads

Digital transformation in a legal setting isn't a single, one-time project with a defined end date. New matter types, evolving regulations, and shifting client expectations mean that the document workflows that work today will need to adapt again in the future. A process that is built around this year's caseload may not fit next year's, especially as new practice areas open up or regulatory requirements shift.

Digital transformation should be treated as an ongoing discipline that is revisited as practice areas and requirements change, not a one-time initiative. This helps support an environment where legal teams are working from documents that they can trust because they remain current, accurate, and accessible to the people who actually need them.

Achieving effective document governance can benefit from an integrated ecosystem of enterprise capture hardware, automated redaction tools, and secure cloud repository routing—an operational framework where Canon's specialized legal technology solutions help firms manage operational risk, support document confidentiality, and improve billable efficiency.

For more information about how Canon U.S.A. can help your organization with your digital transformation goals, call 1-844-50-CANON or visit usa.canon.com/business.

¹ Source: Keypoint Intelligence, 2026 Digital Transformation Survey, U.S. Legal respondents (n=50).

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