

Legal Commoditization:

How to Build Your Own Legal Product
to Compete with LegalZoom



documate

“

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



Commoditization

bespoke


standardization

systematization

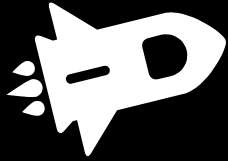
charge online

no-charge
online

commons

A photograph of two white birds, possibly seagulls, flying in a clear blue sky. The bird in the foreground is in a full wing stroke, with its wings spread wide, showing the intricate structure of the feathers. The second bird is further away and higher up, also in flight. The overall scene is bright and clear, suggesting a sunny day.

**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?



UPL

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



Attorney- Client Relationship

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



Before Building

Define Project

Scope

Concept

Who are users?

Pain points

Features

Due Diligence

Status quo?

Market size

Alternatives

Define benefits

Cost

Sustainability

Engage Users

Communication

Interview audience

Manage expectations

Build process map

Unique problems



After MVP

Testing & Feedback

User profiles

UX testing

Functionality

Gamification/Play

Launch

Support

Documentation

Services +

Marketing

Credibility

Stakeholders

Updated

Succession Plan

Examples



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 English ▾

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Examples



LANDLORD LEGAL Community Log In [Sign Up](#)

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](#)

LANDLORD LEGAL

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

Installation One Payment *(Better Value!)*

Starter Membership	DIY Divorce	Divorce Plus	Divorce with Benefits
"Give me access to free resources to support me in my divorce."	"Give me access to the Divorce Navigator so I can do my entire divorce online."	"Handle everything for me. (Prepare and file all of our divorce forms)."	"Handle ALL of my divorce paperwork AND provide me with 2 hours of legal coaching."
FREE	\$99/month	\$500/month \$3,000 payable at \$500 per month for six months	\$500/month \$3,500 payable at \$500 per month for seven months
Sign Up	Sign Up	Sign Up	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.

Output Documents



Step 2: Upload documents

Upload your frequently used Word or PDF documents and forms, and tag them to your interview questions.






Client-facing or internal interview Upload & Continue

Interview Output Documents

Select Output Documents

Click your Document to tag the Fields

 Petition for Reconsideration Court Form.pdf 313 kb of 313 kb	Remove
 Long Form Confidentiality Agreement.png 251 kb of 251 kb	Remove
 Intake Form.docx 124 kb of 278 kb	Remove

[Choose or Drag & Drop Files here!](#)

Run Workflow



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.



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Let's Build!