# *Karen Soan*

Senior solicitor at CLS Holdings

CLS Holdings is a FTSE 250 property investment company, with a £2.4bn portfolio across the UK, Germany and France. Their core business is investing in modern, sustainable offices that help businesses grow. Today, we are speaking to Karen Soan, Solicitor at CLS Holdings in their London office, as she walks us through her journey using automation, as well as revealing her thoughts about legal technology!

### Tell us a little about your current role at CLS Holdings?

I am a solicitor at CLS Holdings PLC. We are in-house lawyers in a small team - Head of Legal, myself, and a secretary. We try to keep as much of our legal work in-house as possible, particularly where it doesn't relate to anything litigious. If there is anything that is likely to result in litigation, we will take that out to external solicitors. We will do all our lease negotiations, majority values, finance documents, any other related property documents that we need in-house.

The other thing our company does, which is unusual for a property investment company, is we keep all our property management in-house. There are a number of documents related to management of the property. For example, the Framework Agreements, and the Order Agreements that we've done using Avvoka that we will do in-house. So it's a lot of document drafting.

### What do you enjoy most about your role?

I like working together with other departments in the organisation. When we have an important project where we have a big financing, or when we work on the purchase of a building or the sale, even though we don't do it together, those are probably the most interesting parts. That's what I like the most.

> " **With Avvoka, the first draft can be ready in about 10 minutes!** You are able to just drop information down from a database and cut out manual errors. You have to try it!"

### Could you detail the impact technology has had in your role to date?

Personally I am a bit nervous about technology. I'm not at the cutting edge of technology despite being the person who deals with Avvoka. I think it's a lawyer thing, we like paper and paper trail. We prefer seeing things that we can hold in our hand and flick through!

When I first started working, we worked on a typewriter with carbon paper between pieces of paper. So, you know, when that's where you've started, when you come to this kind of digitalisation of all your documents, it's quite

a big change mentally. I'm more comfortable reading a piece of paper than I am looking at something on screen. But I am definitely getting better.

**Do you think document automation is a necessity for businesses?**

Well, it very much depends on what your business is. It's probably not relevant for absolutely everybody. But I think technology is going to become more and more prominent in businesses. For instance with document automation, more and more as people are using it, and it will play a bigger and bigger role. I think that's just the way it's going. It's not going to go backwards.

> **" If you aren't prepared to change...**you're going to get lost somewhere along the line. Your competitors will use it. It will make them quicker. They'll be able to respond to things more effectively and **you'll be left behind."**

At CLS we haven't really seen all the benefits of it, just the drafting part, because we haven't really been using Avvoka to its full capacity yet. But we have already seen a lot of benefits, you can mark up the documents with placeholders, generate them quickly, you can store them efficiently, find information and the system builds up and it's better running.

There are long term benefits of using automated documents and then having all that information collected for the future - you can save a lot of time, in terms of finding data in your documents with ease instead of going through piles of

paper. Most organisations would be able to benefit from this in some shape or form.

**What do you think is slowing down legal technology adoption in your sector?**

Well, I think it depends what partners think. It's a mindset about paper and about wanting some sort of proof and a trail when something's been done. That's a general concept for lawyers, we like to have a paper trail as an assurance.

Specific to the property industry, there has always been the Land Registry. The Land Registry has until very recently required original documents. You can't do land transactions unless they're in writing and until very recently in writing has meant producing a paper document. But this is changing. They are now accepting electronic versions for registration.

**How did you decide which documents to automate first?**

What we looked at first, was the frequency with which we use a document and so we chose the five documents that we use most commonly - an agreement for lease, a lease, a rent deposit deed and a car parking licence. We have two other versions of our main lease, which is one for a specific building and one, which is in a specific form. So, there's a base lease and then the other four main documents and they were chosen on the basis of frequency of use.

**How long does it take to draft a Lease agreement using Avvoka?**

It depends on how complicated the document is. But I would anticipate that if you have all the dropdowns, and the datasheets so that you can
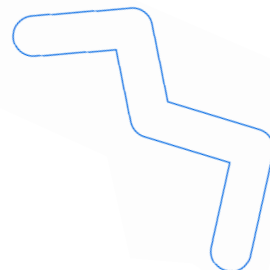
get the data quickly, the link to the Company House for the tenant information - these can drop in and out by answering one question; with Avvoka the first draft can be ready in about 10 minutes!

The other time consuming thing is that the way we work, it [i.e lease] then goes to our Asset Managers or whoever's instructed us for them to check and occasionally it goes to a third person.

Whereas, when we use Avvoka, if you are able to just drop information down from a database, you cut out manual errors. And I think that saves a huge amount not just in the drafting, but then the review process. When you insert the details of your tenant and your landlord you can also drop them in a suite of documents at once. And I think that saves time over and above the actual drafting.

" We are continuously surprised at how **brilliant your service** is and service delivery like that is unusual. You don't normally get people who respond so quickly... And I'm always surprised **how quickly the system is able to change** and respond when we need it to."

**Has anything surprised you about the automation process/learning to automate on Avvoka?**

I think it's really interesting what you can do. That's the other thing, I think the system has enormous capacity that we don't even touch.

You know, we don't even get there, we use a quarter, a tenth of what it is that we could potentially do on the system! So it is a very powerful tool.

**What is your favourite Avvoka feature?**

I would say Datasheets. I like that if you can link those datasheets to your questionnaire, then you can just drop the information in with dependencies. For example, when it picks up the name of the property, it'll pick up the registered address of the property and the company number and, you know, pick up various bits of data. I think that's very useful.

We set up Datasheets because we are a property owning company. We have various properties that are all owned by what we call single purpose vehicles, companies that own one specific property and that's all they do.
So when we're doing a lease, for example, the property will be linked to the company. You will have to fill in the company's registered address, the number, and the property information.

We can put all of that information in our Datasheets to then use in our documents and it will be linked to just one question that will drop in all of that related information that you want in seconds with no errors. It works with dependencies, so we will have a property that's linked to a company, that's linked to a company number, that's linked to a title number. It can drop all of that information just by including the property name or company name.

We also have a link to Companies House, you can click on it, you can call up the name of the
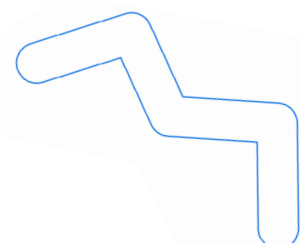
tenant, which we may not have. And then you can just carry that information over and that reduces mistakes enormously.

**What do you think the biggest misconception is about automation/ the thing people get wrong the most?**

I think people are still partly distrustful of a program filling in the information. There is a feeling around this sort of thing that you're not thinking about it if you're using a program to do it. I don't think it's true. You can always re-read it afterwards.

There are other ways of checking the work. And the other misconception we may struggle with is to get lawyers to negotiate in the Avvoka system. Again, because I think they may be slightly distrustful of how it works or you know, a little bit sceptical about.

**What advice would you give to lawyers in a similar position of starting a legal innovation project?**

You have to try it. With Avvoka, we definitely had a period when we were able to use it in a trial. So I would say, give it a chance, go and see it because it will save you a lot of time.

Potentially it can save money too because you could, in the end, get people who aren't lawyers to draft some documents. If it's just information you need to fill in, it opens up for all sorts of other non-fee earning people, or people who aren't earning the same level of fee, to be able to do this kind of work on already approved templates. So I think it saves money, certainly.

# *Quick fire Qs*

### What is the best piece of tech you can't live without?

My mobile phone.

### Best purchase you've made for a home office?

I have a special keyboard because I have repetitive strain injury and I really can't work without my special keyboard.

### What is the best piece of advice you were given in your career?

Be brave. I think you have to be brave. You just have to take a chance, don't you?

### Work from home or Work from the office?

I like the flexibility to be able to work from home because it allows you to manage your own life around your work - and I have a very long commute from where I live. But for me personally, I do like coming to the office. I like the interaction with people.

I like the way if I need a question answered, I can quickly  pop down to somebody and ask a question. It makes drafting something quicker. Also, you know, you pick up other things about what's going on in an organization. If you are at home, you tend to focus on somebody specifically to have a specific conversation and you don't have those kind of more random generic sort of conversations with people.