



softo

# Guide to AI Agents for Legal Leaders

How to lead the automation revolution  
with intelligence and impact.



# 00

## Introduction

Page 03

# 05

## The Automation Journey: How to Start

Page 12

# 01

## The Landscape of Automation with Autonomous AI Agents

Page 04

# 06

## AI Agents for the Legal Sector

Page 15

# 02

## Types of Automation

Page 05

# 07

## Agentic Now: Softo's Solution for Autonomous AI Agents

Page 18

# 03

## Opportunities for Modern Management with Autonomous AI Agents

Page 09

# 08

## How to Measure the Results of AI Agent Implementation

Page 21

# 04

## Why AI Agent-Based Automation Cannot Be Ignored

Page 11

# 09

## The Future of Automation and Your Company

Page 23



# 00 Introduction



Modern leadership faces the constant challenge of balancing operational efficiency, innovation, and competitiveness.

In this dynamic landscape, **automation based on autonomous AI agents emerges as an indispensable tool**, transforming complex processes into strategic opportunities.

This guide was created for leaders who seek not only to understand trends but also to make informed decisions. Here, we will explore the disruptive potential of AI agents, their applications, and most importantly, how they can position your organization ahead in the market.

If you lead teams, manage processes, or seek innovation, **this is the guide you need to understand and adopt intelligent automation.**



## An illustration of a white and orange drone with four rotors, carrying two black and orange suitcases. Below the drone is a long conveyor belt with orange rollers, moving several black and orange suitcases. There are also some loose suitcases and boxes on the ground around the conveyor belt.

Autonomous AI agents represent intelligent automation, or **Automation 2.0**, where systems not only follow rules but also learn, make decisions, and evolve based on real-world data and scenarios.

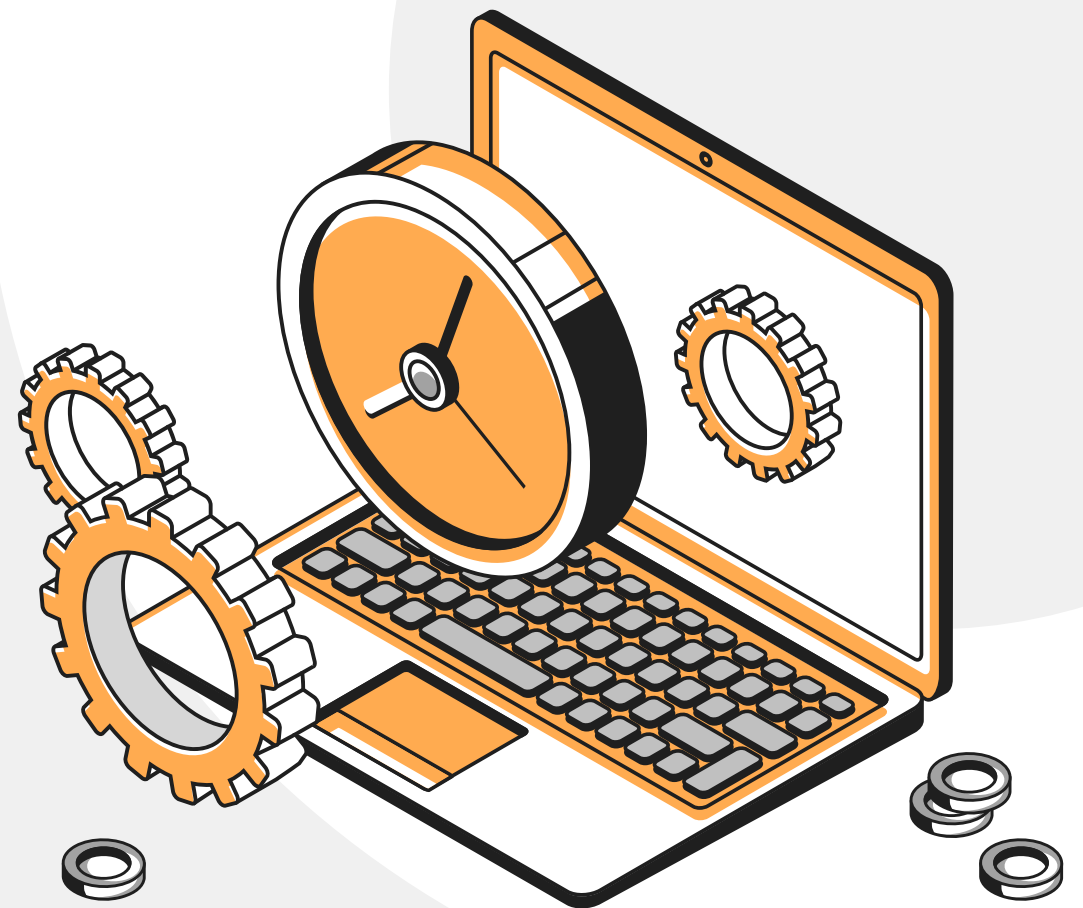
According to Gartner, by 2028, at least 15% of daily work decisions will be autonomously made through agentic AI, up from 0% in 2024. Companies leading this adoption are already reporting significant gains in efficiency and competitiveness.



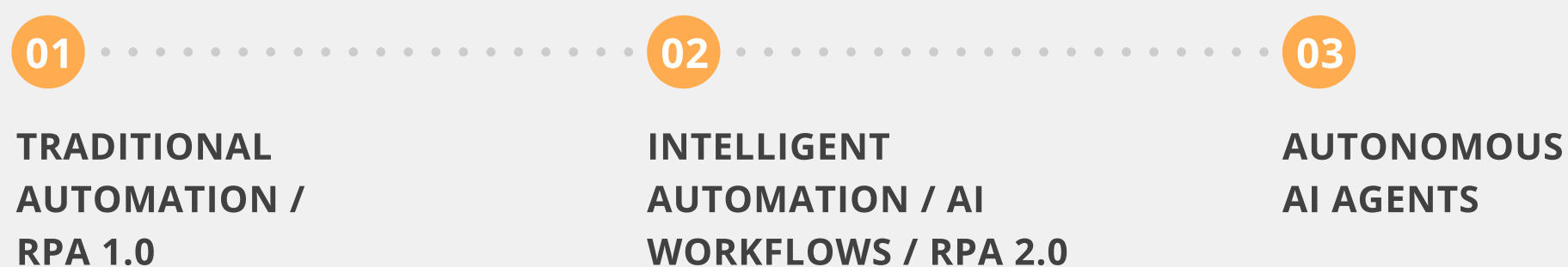
**Source:** Gartner, "Top Strategic Technology Trends for 2024".



## 02 Types of Automation



Automation has evolved in three major waves:



01

**TRADITIONAL  
AUTOMATION (ROBOTIC  
PROCESS AUTOMATION  
1.0 OR RPA 1.0)**

Traditional Automation is more deterministic and focused on repetitive tasks based on clear rules, such as structured data processing and the generation of predefined outputs.

Examples of traditional automation include the automation of managerial processes, automatic updating and maintenance of systems and databases, file processing for integration, periodic report generation, among others.



## 02

## CREDIT APPROVAL SYSTEMS

## LOGISTICS OPTIMIZATION

## UNSTRUCTURED DATA PROCESSING

Intelligent Automation, also known as AI Workflow or RPA 2.0, involves **integrating AI processing within the workflow of a deterministic process**. This incorporation allows systems to process unstructured or subjective data and add intelligence to the process—something that is not possible with RPA 1.0.

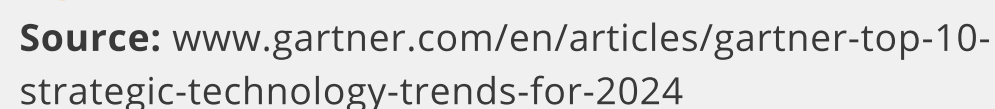
Workflows can incorporate routing decisions within the process itself, based on **real-time AI-driven data interpretations**.

Predictive analytics mechanisms embedded in the workflow can anticipate behaviors and **identify complex patterns, optimizing critical processes and dynamically adapting to new data and contexts.**

## Recent Studies Highlight the Positive Impact of This Technology:

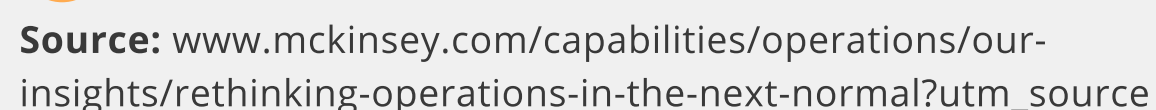
## "HYPERAUTOMATION TRENDS 2024":

Reports that intelligent automation tools can increase organizational efficiency by up to 30%, particularly in areas like finance, customer service, and logistics operations.



## "THE NEXT NORMAL IN OPERATIONS":

Highlights that adopting AI-powered intelligent workflows helps optimize processes such as credit approval and logistics management, achieving up to 20% reductions in operational costs.





## 03 AUTONOMOUS AI AGENTS

Autonomous AI agents establish a new level of automation, enabling systems to operate independently, make decisions based on continuous learning, and **adapt to new information in real time.**

Unlike previous approaches, they may not have rigid rules dictating how they should work but rather **broader guidelines on how specific tasks should be performed.** Autonomous AI agents operate in specialized ways and can be developed to work individually or in groups, known as Multi-Agents.

Autonomous AI agents are designated as professionals or members of a work team. For example, it is possible to create a Multi-Agent system that functions exactly like an advertising agency, consisting of a Marketing Director, Advertiser, Copywriter, Designer, Proofreader, and Coordinator. Each role in this team is represented as an Autonomous Agent with its own skills and functions. These agents receive tasks and are coordinated by the Coordinator. Each one contributes to a broader process—in this example, the team of agents would be capable of developing a complete marketing campaign.

An important feature is that tools, such as applications and systems, can be provided for the agents to use in executing their tasks.

### Key Characteristics of Autonomous AI Agents

#### OPERATIONAL INDEPENDENCE

Using techniques such as generative AI models and memory, these agents can adjust their strategies based on market variables or changes in operational environments. They are specialists who receive a task and determine the best way to execute it.

#### CONTINUOUS LEARNING CAPABILITY

These systems leverage real-time data to learn and adjust their behavior without the need for manual reprogramming.



## Examples of Use Cases

## FINANCIAL ASSISTANTS

Tools from companies like Morgan Stanley that use AI to personalize investment strategies based on clients' objectives.

## AUTONOMOUS SUPPLY CHAIN MANAGEMENT

Companies like Amazon and Walmart utilize agents to monitor inventory and automatically adjust deliveries, reducing waste and optimizing timelines.

## ADVANCED CHATBOTS

Applications like ChatGPT are used for technical support, sales, and customer service at scale, providing personalized and rapid responses.

## Research Validating Strategic Relevance

**PWC,**

## "THE POTENTIAL OF AUTONOMOUS AGENTS IN BUSINESS":

Estimates that autonomous agents can increase productivity by up to 25%, directly impacting areas such as supply chain and finance.



**Source:** [www.pwc.com/us/en/tech-effect/ai-analytics/ai-predictions.html](http://www.pwc.com/us/en/tech-effect/ai-analytics/ai-predictions.html)

DELOITTE,

## "AI AND THE FUTURE OF WORK":

Highlights how autonomous agents are being used in the financial sector to analyze portfolios in real time and provide personalized recommendations based on continuous learning.

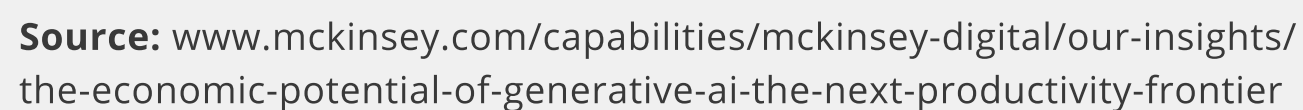


**Source:** [www.deloitte.com/global/en/services/consulting/research/generative-ai-and-the-future-of-work.html](https://www.deloitte.com/global/en/services/consulting/research/generative-ai-and-the-future-of-work.html)

These agents serve as strategic allies, allowing organizations to scale operations and quickly adapt to market changes while keeping competitiveness and innovation at the core of their strategies.



Companies adopting automation report efficiency gains of up to 40% and operational cost reductions of up to 30%. AI agents extend these benefits to complex areas like customer service and logistics.





## ERROR REDUCTION

**Eliminating human errors** in critical processes increases data security and reliability.

## OPERATIONAL SCALABILITY

Scaling operations without a proportional increase in human resources is a **clear competitive advantage**, especially in dynamic markets.

## DATA-DRIVEN DECISION MAKING

AI agents enable **real-time analysis** and detailed insights, optimizing strategies and streamlining operations.

## SPEED IN ADAPTING TO CHANGE

Automated companies can **quickly respond to market changes**, adjusting efficiently and precisely.



## A stylized illustration featuring a white and orange robot with a large letter 'A' on its chest. To the right of the robot is a large, tilted clock face with a white border and a grey face. Below the clock are two 3D pie charts, one large and one small, both with orange and white segments. The entire scene is set against a light grey background with a white circular gradient.

According to PwC, AI could add \$15.7 trillion to the global economy by 2030, making it one of the largest drivers of economic growth

**Source:** [www.pwc.com/gx/en/issues/analytics/assets/sizing-the-prize-regions\\_v2.png](http://www.pwc.com/gx/en/issues/analytics/assets/sizing-the-prize-regions_v2.png)

Pioneering companies in intelligent automation have a unique window of opportunity to stand out in terms of efficiency and innovation.

AI agent automation cannot be ignored because it directly impacts competitiveness, efficiency, and the ability to innovate, making it a critical success factor in today's digital transformation landscape.



on  
g journey.  
it's essential  
is approach

Here's a step-by-step guide to begin intelligent automation.





## 01

Market analysis and the selection of specific frameworks are essential to ensure that the solution meets the organization's needs.

02

It's crucial to align automation with the organization's **strategic goals**. Set clear and measurable goals to understand how automation will contribute to improving **operational efficiency, cost reduction, and competitiveness**.

03

The next step is to **conduct brainstorming sessions** with the involved teams and perform an **internal assessment** to understand which processes can be automated.

Collaboration among multidisciplinary teams and gathering information about existing operations helps identify weaknesses and opportunities for intelligent automation.



04  
**DEFINING  
TECHNOLOGIES  
AND  
APPROACHES  
THROUGH POCS**

After analyzing the landscape and setting goals, **it's time to choose the right technologies.** Using Proof of Concepts (POCs) is a common strategy to test solutions before full-scale adoption. With POCs, you can assess the effectiveness of selected technologies, such as RPA (Robotic Process Automation), AI workflows, and autonomous agents.

POCs help companies validate their technology choices, allowing teams to identify potential challenges and adjust approaches before making a full commitment.

05  
**SOLUTION  
ENHANCEMENT**

Once automation has been implemented, it's important to maintain an ongoing process of solution enhancement.

Automation should be regularly adjusted based on performance feedback, market evolution, and new technological opportunities. Continuous optimization helps maximize the long-term value and impact of automation.

The constant evolution of automation solutions is necessary to stay competitive and innovative.

Companies that invest in continuous improvement ensure that their operations remain relevant and effective.

06  
**IMPLEMENTATION  
AND MONITORING**

**Implementation and continuous monitoring are key to ensuring the success of automation.** The solution must be carefully monitored to ensure it's delivering the expected results. It's important to adjust automation based on performance and market changes.

According to PwC, studies, effective monitoring of AI and automation solutions helps companies quickly adapt to market condition changes and identify new improvement opportunities.



Automation and intelligent analysis of legal data not only increase efficiency and accuracy but also make processes more agile and less prone to errors. **AI agents are enabling legal professionals to focus on higher-value tasks**, such as strategic consulting, while the agents handle the heavy workload and repetitive tasks.



## RELEVANCE TO THE LEGAL SECTOR

The relevance of AI agents for the legal sector goes far beyond simply automating tasks. **They are changing the way lawyers work and how legal services are delivered to clients.**

Instead of relying solely on manual document reviews, **AI agents can analyze large volumes of information in seconds, detect patterns, and even predict trends based on historical data.**

In the legal scenario, this means **greater agility in delivering results, reduced operational costs, and more accurate decision-making**. AI agents are not just a support tool; they are a game-changer that transforms legal service delivery and positions organizations ahead of the competition.

## USE CASES OF AI AGENTS FOR THE LEGAL SECTOR

## CONTRACT ANALYSIS

AI agents can review contracts in minutes, identifying important clauses, inconsistencies, and legal risks.

## LEGAL OUTCOME PREDICTION

Using machine learning algorithms, AI agents analyze case law and case histories to predict likely legal outcomes.

## AUTOMATED LEGAL RESEARCH

AI agents can accelerate legal research, locating relevant precedents and analyzing specific legislation in record time, allowing lawyers to focus their efforts on strategic activities.

## RISK AND COMPLIANCE MANAGEMENT

AI helps identify regulatory and legal risks by monitoring changes in laws and regulations, ensuring companies stay up-to-date and avoid penalties for non-compliance.

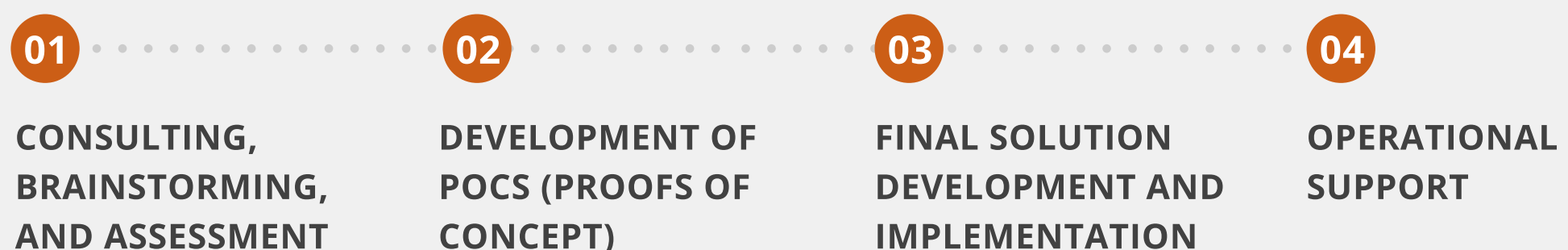


<b>AUTOMATION OF REPETITIVE PROCESSES</b>	Bureaucratic processes such as document drafting, generating standard contracts, and filing cases can be fully automated.
<b>LEGAL CHATBOTS FOR CONSULTATIONS</b>	AI agents can act as virtual assistants, answering clients' legal inquiries, such as questions about deadlines and procedures.
<b>LAW FIRM MANAGEMENT</b>	AI agents optimize law firm management, from scheduling meetings to tracking legal deadlines, ensuring greater organization and efficiency.
<b>PREDICTIVE ANALYSIS FOR NEGOTIATING SETTLEMENTS</b>	AI tools help calculate the likely value of settlements and identify the best times to negotiate, based on historical data and trends.
<b>LEGAL TRAINING AND DEVELOPMENT</b>	AI agents can personalize legal training content, using internal and external data to create programs tailored to the professionals' needs.



Illustration of a robot character standing on a smartphone, surrounded by icons representing productivity and AI workflows, including a calendar, a bar chart, and checkmarks.

This solution consists of four key stages designed to ensure technological transformation in an agile, personalized, and sustainable manner.

The logo for Agentive Now. The word "agentive" is in a large, bold, black sans-serif font. Below it, the word "now" is in a white sans-serif font, set against a solid orange rectangular background. To the right of the orange box, the words "The AI Agents Factory" are stacked vertically in a smaller, black sans-serif font.



## 01

## STRATEGIC CONSULTING

## STAKEHOLDER BRAINSTORMING

## INTERNAL ASSESSMENT

02

## PROTOTYPE CREATION

## TECHNICAL AND BUSINESS VALIDATION

## QUICK ADJUSTMENTS

Response	Percentage
U.S. should take more action to address climate change	85%
U.S. should take less action to address climate change	15%



03

## SOLUTION CUSTOMIZATION

## INTEGRATION WITH EXISTING SYSTEMS

## FULL-SCALE TESTING

04

## TEAM TRAINING

## OBSERVABILITY, MAINTENANCE, AND UPDATES

## EVOLUTION AND SCALABILITY

Response	Percentage
U.S. should take more action to address climate change	85%
U.S. should take less action to address climate change	15%



## A 3D isometric illustration of the consumer decision-making process. The scene is composed of five main platforms, each representing a stage, connected by a series of white steps. The stages are labeled with speech bubbles: 'SEARCH' (top right, featuring a magnifying glass icon), 'COMPARISON' (middle left, featuring a bar chart icon), 'PURCHASE' (middle right, featuring a shopping bag icon), 'WISH' (bottom right, featuring a heart icon), and a final stage at the bottom center featuring a gift box icon. A person with blonde hair, wearing a white shirt and orange pants, is walking on the 'COMPARISON' platform, carrying a shopping bag. The entire scene is set against a light gray background with a subtle grid pattern. Small red and white cubes are scattered around the platforms, adding to the 3D effect.

Analyze the before and after of adopting autonomous agents, considering labor costs, rework, or resources that were automated.



Check if there was an increase in sales, upsell/  
cross-sell, or conversion rates.



Measure the number of tasks completed and error rates over a given period and compare with the previous scenario.



Calculate whether the increase in revenue or cost reduction exceeds the expenses of implementing, maintaining, and evolving the agent.



## SATISFAÇÃO DE USUÁRIOS INTERNOS E EXTERNOS



### **CUSTOMER SATISFACTION (NPS, CSAT)**

If the autonomous agent interacts directly with the public (e.g., a chatbot or recommendation tool), Net Promoter Score (NPS) or customer satisfaction indices can be measured.



### **EMPLOYEE FEEDBACK**

When the agent is used for internal support or direct interaction with the team, it's important to measure how much the teams feel the solution improves their daily tasks or aids in decision-making.



### **ADOPTION RATE**

How many people actually use and trust the autonomous agent once it's deployed?

## PROCESS QUALITY AND RELIABILITY



### **QUALITY OF RESULTS**

In process automation tasks, how many exceptions or rework are necessary after the AI agent completes its part?



### **COMPLIANCE AND LEGAL CONFORMANCE**

Monitor whether the AI agent operates according to regulations (LGPD, GDPR, etc.) and does not pose risks of penalties



# DEEP INTEGRATION WITH AGENT SYSTEMS

These systems go beyond automating specific tasks; they will be **capable of interacting with each other and making real-time data-driven strategic decisions**. This will enable greater efficiency and adaptability.

As automation evolves rapidly, job profiles will undergo significant changes. **Professionals will need to reskill to handle advanced technologies**, focusing on higher-value strategic roles. Repetitive and manual tasks will be delegated to AI agents, **while human employees will concentrate on creative, analytical, and decision-making functions.**



## **AUTOMATION AS A STRATEGIC FOUNDATION**

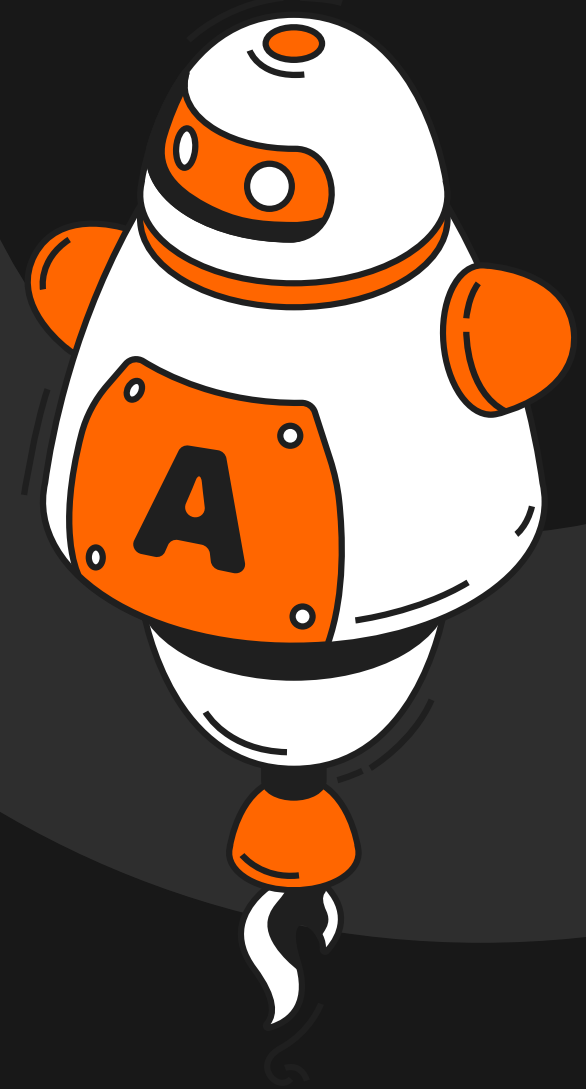
AI and automation will no longer be seen as isolated, one-off projects; they will become **strategic foundations**, essential for innovation, competitiveness, and value creation. Companies that embrace this vision will be able to:

- Define new ways of working, integrating collaboration between humans and autonomous agents.
- Create sustainable value, developing customized solutions and enriching experiences for customers.
- Compete more efficiently in the market, using data and predictive analytics to make faster and more accurate decisions.

Organizations that adapt their strategies to include automation at their core will not only stay relevant but will also be one step ahead in the business world.



# Unlock the Power of AI Agents to Thrive Your Business with Agentic Now!



At Softo, our AI experts are ready to offer customized solutions with artificial intelligence agents, designed to act as digital partners.

Leverage the potential of AI agents to:

01

AUTOMATE  
COMPLEX  
PROCESSES

02

GAIN REAL-TIME  
STRATEGIC  
INSIGHTS

03

INCREASE  
OPERATIONAL  
EFFICIENCY

04

MITIGATE RISKS  
AND PREDICT  
SCENARIOS

**agentic**  
**now** The AI  
Agents  
Factory



## Prosper your business with Softo's Customized Solutions!

Softo is a software house specialized in developing tailor-made solutions. Combining cutting-edge technology, experts, and an agile approach, we help businesses transform complex challenges into impactful innovations.

Additionally, **we integrate AI agents to bring intelligence and automation to your solutions**, enhancing efficiency and creating new opportunities for your business.

Schedule a free consultation and discover how AI agents can become strategic allies for your business growth.

CONTACT US:

**GET-IN-TOUCH@SOF.TO**

**sof.to**