

## **Transcript: Interview with Ms. Grace (Paralegal)**

**Date:** [Insert Date]

**Interviewer:** Lastra

**Interviewee:** Ms. Grace

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**Lastra:**

Good morning po. Yes, we can hear you now—thank you po.

**Ms. Grace:**

Yeah, I just used another device to make sure everything is okay. Thank you po.

**Lastra:**

First of all, thank you for agreeing to this interview. Just a quick disclaimer: this is being recorded, and as stated in the contract, we also asked for your permission to include a transcript of this conversation in our research publication. To not waste time, I'll get straight into it.

**Lastra:**

How long have you been working as a paralegal?

**Ms. Grace:**

Hi, my name is Mary Grace Joy Sotardona. I've been doing paralegal work for almost three years now. I have a Juris Doctor degree from Central Philippine University here in Iloilo. I also have a strong background in legal assistance and administrative support. I've worked as a paralegal both locally and in the U.S.

**Lastra:**

Thank you po for sharing that. What is a typical day in your work as a paralegal? What kind of documents do you work with most?

**Ms. Grace:**

Just to confirm, it's okay if I answer in Taglish, right? Okay. So, my current job is focused on estate planning and document automation. The three main components are the Will, Power of Attorney, and Trust. The client first sets an appointment and fills out a form through our software. Within a few seconds, the documents are generated. Then I proofread them to ensure all necessary fields are filled and there are no discrepancies. For counties like Duval in Florida, we also prepare a Quit Claim Deed for every property there, as it's required.

**Lastra:**

Thank you for that. How do you currently find specific information in your case files?

**Ms. Grace:**

You mean manually or using a search function?

At first, if you're unfamiliar with a file, it takes time—you really have to go through and find the important parts. But over time, when you get used to a certain type of document, it becomes easier and your eyes sort of “know” where to look.

**Lastra:**

Understood po. Now, what would you say are the top three to five pain points or challenges in your workflow? Maybe something you wish was more efficient or could be automated?

**Ms. Grace:**

Since I already work in document automation, I'd say the challenges mostly come from edge cases. Sometimes, the system doesn't apply well to every situation. It really depends—some documents fall under exceptions, and the system isn't always built to handle those.

**Lastra:**

So, if I understood correctly, you'd find it helpful to have a system that can automatically sort or organize files based on their content? Like, once you upload them, it can assign them to the correct case?

**Ms. Grace:**

Yes, exactly.

**Lastra:**

Our software under development is an AI-powered chatbot. The idea is that you upload your legal documents, and then ask it questions. It will retrieve the answer from the uploaded data. One issue we're trying to solve is reducing the time spent manually searching through files.

Unlike ChatGPT, which doesn't allow you to delete your uploads and may use data for training, our tool will let you delete your data any time. Also, it supports multiple documents (even over 200 pages), and we're currently focusing on PDF and Word file formats.

Would that be useful for your workflow?

**Ms. Grace:**

Yes, definitely. That kind of automation would help a lot.

**Lastra:**

To help the system sort documents, how do you typically define or identify a case? Is it by title, ID, client name?

**Ms. Grace:**

Usually, just the title. For example, one case file may have multiple documents, and we often group them in what we call "pockets."

**Lastra:**

Can you define what a "pocket" means in your context?

**Ms. Grace:**

A pocket refers to an application folder—like for a loan modification application. It may include documents like profit and loss statements, borrower's authorization, bank statements, and proof of income. Sometimes they're combined into a single PDF.

**Lastra:**

Got it. Sounds like the AI system would be more suitable for those kinds of "pocketed" documents rather than estate planning files.

Aside from sorting and privacy concerns, are there any other features you wish were available to make your workflow faster?

**Ms. Grace:**

Maybe something like a standard file naming system. Like, automatic file naming with the document title, client name, and date. But I understand that might be a bit tedious to implement.

**Lastra:**

How do you currently name your files?

**Ms. Grace:**

We usually include the title, name of the client, and date. Sometimes shortcuts too. Since one person handles all incoming files, it can get mixed up, which makes it harder to manage.

**Lastra:**

Any other common issues outside of organizing and sorting?

**Ms. Grace:**

Yes, file conversion. Some clients send only images or Word files, but our standard format is PDF. So we need to convert them, which adds to the workload.

**Lastra:**

Are you currently using any tools or platforms to help with your workflow?

**Ms. Grace:**

Yes, for one client we use **Communicate**, which is a white-label version of **Go High Level (GHL)**—a CRM system.

**Lastra:**

Are there any features missing in that platform that you wish existed?

**Ms. Grace:**

Yes. Integration is limited. For example, the messaging feature has a 1,000 SMS cap, and once exceeded, it stops sending. So we use another third-party tool called **REP Chat**, but it's not compatible with GHL.

Instead of automatic syncing like with Salesforce, we have to manually download contacts from GHL and upload them to REP Chat. It's inconvenient. Also, GHL has workflows that stop working when we exceed the message limit.

**Lastra:**

Do you think a ticketing system would help your task management? Something that can prioritize tasks by urgency, due dates, and sources?

**Ms. Grace:**

Yes, I prefer that over direct emails. A ticketing system can notify me about urgency and deadlines. It would also help if there's an option to move tasks to pending if I can't finish them on time.

**Lastra:**

Going back to the chatbot, have you personally tried uploading legal documents to ChatGPT and asking it to summarize or review them?

**Ms. Grace:**

Yes, I've tried it before. I looked for a delete option after uploading, but there wasn't one. So you need to be really specific with your prompts—like mentioning clauses and legal elements—but even then, it felt risky since you can't remove the uploaded content.

**Lastra:**

With our chatbot, you'll have that control. Lastly, would you find it helpful if our system had **voice features** like speech-to-text (STT) or text-to-speech (TTS), or would plain chat suffice?

**Ms. Grace:**

Voice features would be a big help, especially for CEOs or busy clients. But for us in backend support, plain chat is usually enough. Though, if you get used to voice input, it can be faster—unless the system fails to capture what you say.

**Lastra:**

Last question po. Are there any document formats or content structures we should be aware of when working with legal files? Do they usually include tables, columns, or specific layouts? Also, would you prefer password protection for sensitive documents?

**Ms. Grace:**

Yes, it would be helpful to have an option to flag a document as confidential. If it's highly confidential, it should have a password. For regular legal files, it's okay if there's no password. Some PDFs do have tables or multi-column formats too.

**Lastra:**

Thank you po, Ms. Grace. We've used up the 30-minute session. For the remaining part, I'll wait for the documents you mentioned. As requested, if possible, please send **five documents total—three PDFs and two Word files**. You have full discretion on what to share, and we understand you'll remove any PII before submission.

**Ms. Grace:**

Okay po, I'll prepare five different documents. Thank you!

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**Transcript: Interview with Ms. Teri (SMM Professional)**

**Date:** [Insert Date]

**Interviewer:** Lastra

**Interviewee:** Ms. Teri

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**Lastra:**

Our main goal po for this interview is to understand how Social Media Managers (SMMs) work through their tasks on a daily basis—what the usual tasks are and how the workflow goes. We're also hoping to get your opinion po on which parts of your work could be effectively streamlined. It's nothing too technical; we just want to get your insights and understand the field better, since you have a lot of experience po. That's why we reached out to you.

**Ms. Teri:**

Alright, from what school are you?

**Lastra:**

From Pamantasan ng Lungsod ng Maynila po.

**Ms. Teri:**

Oh, PLM.

**Lastra:**

Yes po! We're currently in our third year, and that's why we're starting our IT capstone proposals.

**Ms. Teri:**

Okay. Why did you choose Upwork for this?

**Lastra:**

For this po, we're aiming to interview someone with enough work experience, as required by our adviser. We do have people in our personal network, but unfortunately, most don't meet the 3+ years of experience that's required to give credible insight.

**Ms. Teri:**

Ahh okay, that makes sense. After this, do you have another interview scheduled?

**Lastra:**

That depends po. After this, we'll consult our panel, and if successful, we'll inform you if we'll proceed with another consultation.

**Ms. Teri:**

Alright. Maybe you already have your notes—just send them here in the Zoom chat so I can see them.

**Lastra:**

Okay po. Let me retrieve my notes—they're handwritten for now.

**Ms. Teri:**

It's okay. By the way, you created this Zoom link using your own account, not one under Upwork, right?

**Lastra:**

Yes po, this is my personal account. We're not going to go too in-depth—just general ideas and insights.

**Ms. Teri:**

Alright. Maybe you can also give me a short testimonial after, just to add to my portfolio? Just to note it was a consultation?

**Lastra:**

Yes po, that's okay.

**Ms. Teri:**

Thanks! If you have more questions about your thesis, feel free to contact me even outside Upwork.

**Lastra:**

Thank you po. Actually, our capstone is more of a system development project—it's part of our Computer Science program.

**Ms. Teri:**

Ah, so it's a capstone project. That makes sense. You're building a software or hardware solution?

**Lastra:**

Yes po, it has to be a working system.

**Ms. Teri:**

Alright, let's begin.

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## **Main Interview**

**Lastra:**

Good morning again, and thank you po for accepting the invitation for this interview. I'll go straight to the first question:

**What's your typical day like? What's your current workflow, and what are the repetitive tasks you usually encounter?**

**Ms. Teri:**

It really depends on the client. For example, I have one in the e-commerce industry. The repetitive task there is inputting invoice data into Google Sheets. We receive the invoices through email—either system-generated or from customers. We need those for tax purposes. So I copy-paste the customer number, PO number, date, and amount into the sheet. That's something I do almost daily.

For other clients, it's more of a weekly task. As for social media, I do a lot of content creation. The work itself isn't super repetitive because even though I create content weekly, I have to come up with different topics every time. One of my clients, for example, is a mental health coach. So I write posts like "What is mental health?" or "Top 5 things to do when stressed."

I usually use ChatGPT to help create captions or blogs. For example, I'll prompt:

*"Create a caption for this topic using a warm tone, targeting an Australian audience."*

Then I get usable content from there.

The repetitive part is really in the **scheduling**—like scheduling posts every Monday for Facebook at a specific time, then the same for Instagram, then LinkedIn, etc.

**Lastra:**

So just to clarify po, you work with both invoice entry and multi-platform posting—Facebook, LinkedIn, Instagram, and sometimes YouTube?

**Ms. Teri:**

Yes, that's right. For Facebook and Instagram, I usually use Meta Business Suite. For LinkedIn and YouTube, I handle those separately. So yes, it becomes repetitive.

**Lastra:**

Got it. For your client files and brand assets, how do you store and organize them? Google Drive lang po ba or do you use other tools?

**Ms. Teri:**

It depends on the client. We use project management tools like **ClickUp**, **Asana**, **Notion**, **Trello**, and **Monday.com**. It really varies. Personally, I like using ClickUp—it has everything I need. My documents are also in OneDrive. We also use **Communicate** as a CRM and time tracker.

**Lastra:**

In your opinion po, do you wish any of these tools had specific features—small or big—that could help improve your work?

**Ms. Teri:**

Maybe built-in **recording and transcribing** features like Zoom. I haven't explored it yet if ClickUp has those.

**Lastra:**

Going back po sa scheduling—how do you manage calendars? Do your clients provide access or accounts for those platforms?

**Ms. Teri:**

Yes, the client provides the calendar, accounts, and schedule. I don't use my personal calendar. They give full access to the tools, CRM, and databases I need.

**Lastra:**

So in your case, mostly manual input nalang po?

**Ms. Teri:**

Yes, we're offering the service part—manual scheduling and setup.

**Lastra:**

If there was a way to optimize the scheduling part, what would that look like for you? For example, you type:

*"Schedule this post on Facebook at 10 AM, on Instagram at 12 PM, and notify the client via email."*

Would something like that help?

**Ms. Teri:**

Yes! That would really simplify my workflow.

I think something like a **workflow builder** would help—especially for social media and email marketing. For example, when someone books a service, they automatically receive a welcome

email. Then reminders are sent 3 days before and 1 day before. I tried creating one using ChatGPT, but it wasn't very helpful.

**Lastra:**

How would you envision the ideal workflow po? What inputs, outputs, and actions do you need?

**Ms. Teri:**

Let's say the workflow starts when a client clicks to book a service. That triggers a client form. Once that's submitted, they receive an email with details and reminders.

**Lastra:**

So reminders are sent to both you and the client?

**Ms. Teri:**

Yes, it's better that way—so both parties are updated.

**Lastra:**

After the reminders, it proceeds to the **scheduling**, then confirmation after the post is published?

**Ms. Teri:**

Yes, exactly.

**Lastra:**

For content creation like captions and post copy, do you want a separate tool like ChatGPT, or do you prefer it integrated into the same platform?

**Ms. Teri:**

It would be better if everything was in one platform. Right now, we jump between ChatGPT, Perplexity, Claude, Gamma, etc. If there was just **one system** for all of it, that would be ideal.

**Lastra:**

That's very helpful insight po. Ma'am Teri, that's all the questions we have for now. Thank you for sharing your time and insights with us. Would it be okay if we turn on our cams for a quick screenshot, just as proof of the meeting?

**Ms. Teri:**

Sure, that's fine.