

BY CHRISTY BURKE

Paper *Trail*

More law firms see benefits from utilizing document assembly and automation software.

The legal profession is somewhat shrouded in mystery because most “laypeople” don’t know what attorneys know – the inner workings of the law. However, one part of the practice of law does resemble a manufacturing process: the generation of documents. For all of their artisanship, certain types of law firms can alternatively be viewed as highly skilled document factories, operating with varying degrees of efficiency in delivering their specific work product, be it a lease, a brief, a will, etc.

To ensure client satisfaction, one of a law firm’s primary objectives must be to generate a large quantity of documents quickly, effectively, and accurately. During the past several years, law firms have turned to different types of technology to facilitate this process, realizing that without productivity tools, the workflow would be too sluggish and they would soon be left behind by more tech-savvy competitors.

Document automation and assembly tools have existed for many years, but have recently become more intuitive and full-featured. In turn, early-adopter firms have had time to achieve the full benefit of these productivity enhancements, and they provide strong examples of best practices for their peer organizations.

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DOCUMENT ASSEMBLY TECHNOLOGY

Document assembly software allows law firms to create templates of frequently used documents with variable fields coded into the templates. To populate a document with details relevant to a client, the document assembly product generally provides a digital form or "answer file" that the user completes with information about the matter at hand (client name, state/county, etc.). Once the answer form is completed, the document assembly product then automatically populates the template with relevant information. This technology is the antidote to the "dupe (duplicate) and revise" method of document assembly, whereby a previously created document is found and edited to suit a different case.

According to technology consultant and trainer Roberta Gelb of Chelsea Office Systems, "The duplication of old documents to create new ones is time-consuming and laden with hazards." Gelb adds that if the content from the previous version is not completely edited out, the client (or court) can receive a confusing, inaccurate document that makes the attorney look very unprofessional, and those errors can be costly. For these reasons and others, document assembly technology has become incredibly important to the firms that rely on it.

HotDocs by LexisNexis is among the most widely known document assembly products, but other document-oriented software providers have begun developing extensions of their technologies to tackle assembly. For example, veteran software provider The Sackett Group Inc., creators of Legal MacPac, recently released MacPac 10, a document production and automation software package. Built from the ground up in .NET/C# utilizing XML content and a SQL database, the product now includes document assembly functionality, acknowledging that law firms

need more ways to generate documents efficiently and with more flexibility.

USAGE "IN THE FIELD"

Carol Cummings, Managing Director of South Carolina-based Rogers Townsend & Thomas PC, says her firm has used HotDocs for document assembly for the past 10 years. Rogers Townsend is especially motivated to streamline workflow because it does foreclosure work, for which quick timelines are essential. Also, the firms' clients require it to provide alternative, flat-fee billing arrangements, meaning that they make the same money whether the attorney spends 10 hours or one hour on the matter.

"The speed in which HotDocs can produce a single document is exponentially faster than the normal find and replace," Cummings said. "Taking all of this into consideration, we are able to produce accurate documents quickly and meet time requirements as well as abiding by client, firm, and court requirements."

Though Rogers Townsend has not conducted formal studies to document the savings based on automation efficiencies, they have cut process time substantially, which is very important to their clients.

"Our clients grade us on performance, which includes meeting deadlines as well as accuracy, and we consistently rate extremely high," Cummings said. "We attribute this success to savings we see with the technology solutions available to us."

In addition to saved money and time for the firm, Cummings says that document assembly technology has also prevented embarrassing or costly errors in document production and filing.

"Document assembly and automation has enabled our firm to produce on-the-fly documents quickly using case specifics to tailor each and

every document," she said. "With document automation, the likelihood of erroneous information being 'left in' from an old modified document has been eliminated."

John Sroka, Chief Information Officer of Philadelphia, Pennsylvania-based Duane Morris LLP, says his firm also uses LexisNexis' HotDocs product for document assembly, and that it is integral to the firm's success.

"Anything that can be automated and save time is good," Sroka said. "Some products evolve and overlap. Specific needs will be unique from practice group to practice group. For example, you won't see document assembly used by a trial group, but real estate attorneys will use it constantly."

VITAL TECHNOLOGY

Duane Morris has also aggressively pursued document automation technology to help streamline its legal work. This broad category of products facilitates managed generation of part or all of a document, either working within or outside

of the Microsoft and Corel Office Suite applications. Eleanor Carbaugh, Duane Morris' Application Support Specialist, reports substantial time savings resulting from the firm's use of Best Authority by Levit & James, a niche-focused document generation software. Best Authority is a vertically focused product that assists litigation attorneys and staff in creating a Table of Authorities (TOA), a list of citations inside a legal brief. Carbaugh notes that TOA generation with Best Authority can save users several hours of work, depending on the length of the document. Also, Best Authority integrates directly with Microsoft Word, the software many law firms use to create most of their work product.

Maureen Durack, Director of Information Systems at Chicago, Illinois-based Vedder Price, says her firm was an early adopter of document automation technology, having started using the macro and template product Legal MacPac about eight years ago. Durack reports that she can no longer imagine functioning without the centralized template product.

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"It becomes like breathing – it's a natural part of our environment," Durack said. "MacPac is at the core of our document generation. Because it's very template-driven and organized, it's easy for our IT department to update templates – and the users don't even notice when the updates are happening."

Durack notes that document automation technology also has ancillary benefits. By giving the firm's documents a consistency of look and feel, Vedder looks more professional to clients and courts alike. And its stability helps the firm to avoid Word document corruption or crashes.

"Having a document automation solution in place has made the technical integrity of our documents much greater," she said. "We now have consistent styles, clean templates and a stable, reliable way of producing work."

Scott Shaw of Ford & Harrison says his firm has used MacPac for 6 years and that the document automation software allows one legal assistant to work for multiple many attorneys at once – a good thing for a firm striving for a 3:1 lawyer to legal assistant ratio.

"Lawyers' time is valuable, but legal assistants' time is valuable as well," Shaw said. "The more time the legal assistant can provide support, the more the attorney can bill. With document automation, legal assistants have the ability to reuse documents. They fill in just the information that changes rather than retyping the whole document. With the right technology in place, the firm can have fewer legal assistants."

Interestingly, Shaw says that his entire firm is using MacPac, not only the lawyers and legal staff.

The marketing department, he says, likes that it produces documents with a consistent appearance and format, thus presenting a standardized, professional image to the outside world. The IT department uses the custom templates for trip sheets for reimbursement. Human resources needs the software for commonly used documents such as new hire check request, and benefits change forms.

A NATURAL PROGRESSION

Clearly, firms are taking a wide range of approaches to document assembly and automation at their firms. The products' flexibility and customizability make them useful and relevant. Over time, the products eventually become second nature to users and effectively shape the structure of daily workflow.

Because clients and legal professionals alike are motivated to reduce costs and improve productivity wherever possible, law firm personnel can leverage document assembly and automation technology as an ally to help in this pursuit. In the business of manufacturing documents, you need to have the right equipment, and legal software providers are filling that need quite well. ✱

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