

Business & Careers

Filling out forms is a whole lot easier these days



Luigi Benetton
Hi-Tech

Does much of your practice involve filling out forms? If you answered yes, electronic forms represent both opportunities and looming threats to your practice.

Clients are the main drivers behind online forms, says Doug Simpson, CEO of Legal Systematics. "They're used to doing things online. Why not legal services?"

This trend drives do-it-yourself form sites, such as those that offer wills for between \$50 and \$100. "A lawyer cannot compete at that price and be involved in that transaction," Simpson says.

This seems particularly true for practitioners of "transactional" law involving

repeatable information gathering, such as that needed for wills, power of attorney and incorporation.

"The legal profession can take back the law from DIY sites by offering a bundle of services that is less costly than has traditionally been the case by using technology and automation to make it more efficient," Simpson says, adding that lawyers need to emphasize things that DIY sites can't offer, like legal advice, solicitor-client privilege, "all the things that come with a lawyer-client relationship."

One way to offer forms is to create PDFs that people can download from your website. While not automated, PDFs are accessible and relatively simple to set up.

Ottawa-area lawyer Donna Neff offers a number of downloadable forms in the PDF format, including an estate planning checklist and travel letters, mainly for children not traveling with their parents. "The forms can be typed out online and the client comes in to have the signature notarized," she says.

Depending on their preferences, clients can complete these forms online and e-mail them to Neff or print the

forms to bring to meetings.

She's glad to be rid of traditional mail. "Those heavy packages we once sent cost \$3 to \$4 to mail," Neff recalls. As well, in Neff's area, a tech-business-heavy area west of Ottawa, clients appreciate this element of her service.

PDFs haven't always performed flawlessly. Neff encrypts the forms she sends clients, using passwords that she gives them when they initially meet. These extra steps, worthwhile from a security stance, mean that "one in 10 clients call to say they can't open the form packages," Neff says.

Even though form setup takes Neff an hour or more per page, each of which can easily contain 20 fields, she doesn't complain. "I save lots of time later," she explains.

Online forms speed up all sorts of transactions. Each page can "check" to ensure that people complete them correctly and flag incomplete fields. This one feature alone reduces the back-and-forth needed to verify a form's contents.

With both PDFs and automated forms, lawyers can access them from wherever they choose to work.

All these features can add up to reduced costs to service a client, which could translate into more competitive yet still profitable rates. Simpson notes that online forms can cut interview time by half, and speed up document production time by a factor of as much as 100. On the flip side, he admits that lawyers may need a greater throughput of clients to maintain pre-form revenue levels.

He also notes an ethical question: "When does a lawyer-client relationship form—when somebody downloads the form?"

Lawyers need to explicitly explain this point on their websites and on the form itself.

To achieve Simpson's bundled services scenario, different systems would be able to share information. That does sometimes happen, particularly between tools sold by the same software publisher, but Simpson sees much of the current crop of input and document generation systems inhabiting an electronic Tower of Babel. Interoperability between systems may arrive once developers adopt a common standard that enables data sharing between website forms and systems like law firm databases and case management systems.

The convenience offered by electronic forms has created a niche market for Michael Carabash, founder and president of Dynamic Lawyers Ltd., which sells legal forms, electronically of course, through DynamicLawyers.com.

"We tell people in our footer, terms of use, disclaimer, blog, videos, etc., that we don't provide legal advice and that they should see a lawyer if they need it," he says, adding that several forms include notes on why it's a good idea to consult lawyers in the instructions or the actual process.

Forms can't serve every purpose. "One-off" matters such as litigation don't lend themselves easily to online forms.

On a personal level, Neff sometimes needs to connect with grieving clients who might not care to be directed to online forms, an experience that can be impersonal.

While the client intake process takes longer if it involves interviews, Neff picks up body language and facial expressions that indicate sensitive issues no form can capture.



JUDICIAL VACANCY ONTARIO COURT OF JUSTICE BROCKVILLE

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