

Business & Careers

Making document assembly more efficient



Luigi Benetton
Hi-Tech

Asim Iqbal has suffered the document assembly itch.

"I sat there as a junior, assigned to do a book of authorities. I had all my cases printed. I was drawing lines by hand. And I was thinking: 'This is ridiculous. I'm taking stuff from an online source, printing it offline, then putting it back online.'"

Iqbal works on high-end insolvency and litigation for Thornton Grout Finnigan LLP. Books of authorities remain part of his life—albeit a less onerous part since he now assembles them in minutes instead of hours.

Lawyers aren't alone in wanting to reduce the drudgery of routinely assembling documents. Doctors create clauses to prescribe medications or describe ill-

nesses in their own notes.

Transactional work like real estate involves the same types of documents every day. People who work on bids, "whether on the solicitation-for-bid side or the preparation-of-bid side," frequently "reuse" the same content in their documents, says Roy Lasris, president of Innovative Software Products of Virginia.

Lasris forgot to mention freelance technology writers like me. I might not use his Pathogoras document assembly tool (the name is a deliberate misspelling of "Pythagoras") but I do use a system-wide text replacement tool on my Mac. As a result, I do things like send eight-line requests to interviewees asking them to use Skype instead of the phone by merely typing "useskype" in an email.

Once people acquaint themselves with basic tools like the ones I use, they can adopt more sophisticated tools like the ones lawyers are most likely to need.

Some benefits of document automation materialize the first day they're used. Others accrue over the long term. That's loosely how the benefits in this article are listed.

Must lawyers prepare every document the firm produces? Doug Simpson thinks not.

"You can have non-lawyers under supervision doing parts of the work at a much lower cost," says the CEO of automated document drafting developer Legal Systematics Inc.

When you use text that's previously been verified over and over, you don't risk making mistakes on that text. Risks involve possibilities like typing a client's name or other matter-specific information incorrectly.

Document assembly systems let you enter a value (like a client's name) once in a given dialog. Once entered, the system replaces each corresponding occurrence of the variable with the value entered.

Made a mistake the first time? Many systems enable changes after the fact, a feature that tends to be easier to use than a word processor's search and replace tool.

Dave Maxfield isn't a fan of the old school method: taking an old document to build a new document. "You're likely to commit errors," opines the Columbia, South Carolina-based consumer protection law attorney. "An error will slow you down in the long run."

To create the best possible results, the document preparation process must include time to proofread and refine prose.

This step can also be partially automated. Rudimentary spelling, grammar and readability checkers in word processors offer some help. Lawyers looking for ways to make their prose easier to read can check out Microsoft Word plugins like StyleWriter and WordRake.

Before they go system shopping, lawyers need to examine the processes they want to automate. A refined understanding of those processes can unearth answers to questions like:

- Does any part of the current workflow seem inefficient?
- Could software handle more of the work?
- Could results be delivered better? Faster?

My "useskype" shortcut would count as one of the "little improvements" Maxfield keeps his eyes peeled for.

"It's very important to shorten the time from when you get a case to when you finish

a case," he says. "Over the course of years, you dramatically increase volume if each case takes less time. You can handle more cases and make more money."

Creating document automation tools that lawyers can use may seem challenging enough. Coming up with tools non-lawyers can use to create legal documents? That takes a whole other level of development and refinement. But the payoff can be worthwhile.

It's not like such services don't already exist. Certain enterprises allow people to prepare basic wills using a series of online questions. Michael Carabash, cofounder of DMC Law, runs DynamicLegalForms.com to cater to this market.

"How do we distinguish ourselves from other firms catering to dentists?" (There are about a dozen in Ontario by Carabash's count). His answer: DentistLegalForms.com.

"Take traditional legal services lawyers perform, siphon off some of that for the dentist to do, and bring in the lawyer for the heavy lifting at the end."

Carabash also lets clients edit their forms for free for a year after they first create their forms.

"This model allows us to offer the service to clients, and it may lead to other services clients require" like administering an estate or creating a corporation.

Carabash's firm can also act as real estate agents when dentists sell their practices "and after they sell, they should update the will because they're sitting on a pile of cash."

Donna Neff sold her firm in early December 2015. She says the sale happened in part because of the curb appeal her document automation tools added to her practice.

Neff says the "transfer period" was much easier thanks to the firm's automated processes.

"The buyer was just enthralled. Shortly after taking over, she referred to the templates, precedents and processes as a goldmine," Neff says.

In my next column, I'll take a look at several more benefits of document assembly systems, as well as several tips lawyers can use to introduce them to their practices.

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