



## Document Assembly Automation

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When an attorney is creating work product, a document assembly product is in order. It's the perfect tool to bring together needed information that is otherwise often stored in incongruent systems such as document management systems, other documents and Internet resource sites. Attorneys and legal staff need to leverage a firm's library of past work, while eliminating the frustrating tasks of endless cutting and pasting and hunting for source documents.

However, without a document assembly application, the law firm's clients are paying billable attorney hours to search for the information they need. This noticeable lack of productivity and waste of resources can be avoided through the utilization of a content rich document assembly application. Nonetheless, many firms still struggle with automating document assembly, based on some common content and content system-related issues:

- Lack of a centralized document repository. Not knowing where the pertinent information is prevents appropriate content use. Know where the documents are and which content is relevant and appropriate.
- Outdated content. When the content is not stored in a centralized location, much of the content is outdated and can't be used without much effort.
- Outdated technology. The content is stored in outdated systems that prevent, or greatly restrict, easy retrieval and have limited searching capabilities.

### Key Elements to a Document Assembly Application

An Enterprise Based Document Assembly Application (EDA) starts with the best parts of a firm's current method of assembling documents. EDA leverages a firm's library of past work, while eliminating the frustrating tasks of endless cutting and pasting and hunting for source documents. Establish and follow these specific EDA rules for content reuse:

- Provide access to expert knowledge-based content from a centralized data store.
- Microsoft Office (especially Word) should be a common denominator for content formatting and work product. Microsoft Word's native tools reduce the training curve, because users intuitively know how to use the EDA the moment they move the mouse.
- Establish a centralized process for document creation and production.
- Explore the ability to save transaction-specific knowledge in a document model in order to prevent knowledge bottleneck that plagues so many law firms.
- Use state-of-the-art security technologies, the same used for online banking applications. This ensures the security of data over the Internet.

### Acquiring an Expert System Knowledge Base

How the firm captures the expert knowledge in the EDA is very important. The expert knowledge base lays in the minds of attorneys, stored documents and workflow processes that possess much of the content by default. Acquiring this knowledge from all these disparate sources and placing it into the working models of the EDA should be straightforward and dynamic:

- EDA allows a firm's experts to add centralized commentary, external resource references (from the Web), and other pertinent information right in the EDA master model. The information is always available, even when the expert responsible for it isn't.
- A firm should be able to adopt the EDA as required; attorney by attorney, practice group by practice group, office by office, or firm-wide.
- EDA should be available on demand, whenever or wherever. This method of working is very different from the traditional proposition of making a large commitment to acquiring, installing and rolling out enterprise software.
- EDA should not have large up-front capital investment in terms of people hours, resources and money.

- EDA should not force a firm to change the way it manages workflow or documents.
- EDA must help a firm manage metadata risk. EDA's centralized content storage minimizes Microsoft metadata in content because the content isn't based off old or reused documents. The metadata is managed in a centralized store.

## Return on Investment

When your EDA is based on a centralized content store and Microsoft Office, the firm is able to increase its return on investment (ROI). ROI is more than the money invested in the technology and the resources deployed. ROI should consist of long-term user training investment, productivity gains because of the EDA and mitigated migration costs when upgrading to new technologies. The gains a firm will typically have when deploying an effective EDA are:

- A firm's knowledge acquisition process is centralized. The content is rich with commentary, external resource references (from the Web) and other pertinent information that can be placed dynamically right into the EDA content. The information is always available, thus reducing the time it takes an attorney to find the information that may be stored across the firm.
- The content is up to date, improving client work product.
- The EDA provides easy to use, yet powerful, formatting tools in the form outline numbering and styles. This creates better work product in a shorter amount of time implementing the firm's best practices and standards for document formatting.
- The content is context based, so the user doesn't need to search for the content.
- The process is smooth and centralized for content examination and commentary. This approach reduces costs and facilitates compliance with changing legal codes.

## Conclusion

Firms that adopt Enterprise Based Document Assembly Applications can save money and increase attorney productivity immediately and in various practice settings — whether in private or government practice, or even an in-house legal department. An effective EDA essentially provides the biggest firm benefit when its knowledge management features are used to share knowledge among larger practice groups. One attorney can take advantage of the experience, expertise and content created by another. With the built-in transaction knowledge content it represents, an EDA is essentially a practice guide online, with the ability to create documents that adhere to a firm's best practices in one place.

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