



Burns & Levinson Find Ease and Efficiency with Esquire Innovations

Esquire Innovations, Inc., a provider of Microsoft Office integrated practice management software services and applications for the legal market, counts more than 550 law firm and in-house council clients utilizing its applications. Esquire Innovations has been developing, supporting, and selling document creation, formatting, re-purposing, comparing, and metadata management software applications in the legal industry since 1999. Innovative Software + Astonishing Services = Extraordinary Client Success

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This Article first appeared in the June 2009 issue of Law
Journal Newsletter
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With practice groups in business/corporate, real estate, business litigation, intellectual property and private client legal services, Boston-based Burns & Levinson LLP represents dynamic, growth-oriented businesses, privately and publicly held companies, universities, institutions and individuals.

The firm's clients are in various industries from traditional New England manufacturing and service businesses, high-technology and life sciences companies and emerging companies to scientists and entrepreneurs as well as Canadian, Chinese and Israeli-based companies.

After several years using a very vanilla version of Office 97, we decided that we needed to do a complete network upgrade. As a large firm, we were continually struggling with document stability and maintaining a consistent look with the documents we created.

The marketing department created guidelines for our staff to try and maintain a consistency with our documents, but we had no way of effectively making these guidelines easy for people to follow. Staff members were using the "Save As" function from old documents to make things easier, but eventually documents were becoming corrupt as users passed along corruption from one document to another. In addition, we did not use any styles when creating documents and time management became an issue.

As part of the network upgrade, it was very clear that we needed a macro/template package to assist us in both creating a consistent branding and in creating stable, functional documents. The network upgrade also included moving from a Novell/Groupwise environment to a Windows/Outlook one and upgrading all of our desktop machines.

Undertaking such a large upgrade, we knew we were going to be bombarding the users with so many new applications that we wanted to make the transition as easy and as similar to Word (a core application) as possible — to retain as much "comfort" as we could.

After gathering a list of possible products/vendors, including Esquire Innovations, Legal MacPac, Softwise/Innova and DeltaView, we went through an extensive period of demos and testing. We had each vendor show us its product and selected several to run in our test environment. We also conducted in-depth conversations with other legal IT professionals to get their candid views on the products.

While there are many products out there, we found that Esquire Innovations' iCreate and iRedline products were the best fit for our firm. The two products blend seamlessly with Microsoft Word, a fact that is appreciated by our users who are extremely comfortable with Word. iCreate and iRedline utilize Enhanced Native Architecture™ ("ENA"), a term coined by Esquire. ENA is the

methodology for retaining the look and feel of Microsoft Word to promote streamlined workflow and reduce end-user training requirements. In addition, by retaining Word's native capabilities, an electronic document can be used for collaboration purposes more effectively.

Implementation

We set up a timeline for the entire upgrade and Esquire representatives came out to our headquarters in Boston to help us customize our templates and toolbars, as well as train our IT department on how to maintain the system going forward. The products were installed on every computer and each user participated in an initial training session.

The roll out of iCreate and iRedline went seamlessly. The tie in to native Word made the learning curve for the end users just as easy as it was for the IT department.

Most of the administration of iCreate and iRedline is done by me or our trainer. The products have been fairly easy to customize to our needs and also to deploy any changes to the end users.

Since installing and implementing iCreate and iRedline, we have upgraded our version with only minimal calls to Esquire for support. The upgrade was a much less daunting experience for us due to the product's ease of use and customer support from Esquire.

Staff members have reacted extremely positively to iCreate and iRedline. This is definitely not something that happened overnight, but as people see the time savings of creating and formatting a document right the first time, they have become advocates.

Key Benefits/Results

iCreate offers enormous capabilities for quickly creating, editing and standardizing legal documents, a problem that had been plaguing our law firm for many years. The product enabled us to stop users from using the "Save As" function for documents, especially primary documents like letters, memos and faxes. As a result we have had a large decline in the number of corrupted documents.

iCreate's "answer screen" has allowed users to input information, tie into "Contacts," and maintain a certain degree of flexibility in terms of writing style all the while keeping a firm grip on marketing standards. The templates also allow us to embed firm styles and numbering into documents while still enabling users to change them as necessary. It has taken any fear over the use of styles out of the equation.

With a similar interface to iCreate, iRedline has allowed us to effectively track changes within documents internally and still clearly communicate with anyone externally using Word. For a small cost, iRedline gives us the tools we need to be more efficient using Word's "Track Changes" and "Compare Documents" features. iRedline has the look and feel of Microsoft Word, which was something that we touted to our users. Built using Enhanced Native Architecture, iRedline brings hard-to-find features of "Track Changes" and "Compare Documents" to the forefront, provides shortcuts to frequently used features, fixes broken features and provides important features missing from native Word.

In November 2008, Esquire released two new versions of iCreate and iRedline. The new version of iCreate offers a multitude of new beneficial features, including:

- Enhanced administration and configuration options;
- Updated template launcher for all firm templates, including litigation documents;
- Legal numbering and styles ribbons for formatting documents;
- Contact management integration; and
- Intelligent ribbons and dialog boxes that adjust to provide template specific options and fields.

The new version of iRedline offers new features, including:

- Document management system integration;
- The ability to work with result documents from third-party applications such as DeltaView, by converting static changes to Words track changes;
- Adding a report to any result document, and create a Change List of all changes in a revised document;
- The ability to manage schemes for insertions, deletions and moves; and
- Proactive management of the metadata historically associated with comparing documents in Word.

While we are very happy with our current products, we do plan to review any and all new products that come onto the market and evaluate them as to whether they can improve our environment. In the near future I expect that we will continue to use Esquire's products and re-evaluate the needs for upgrades as time goes on.

Angela Dowd is the Applications Manager of the law firm of Burns & Levinson LLP in Boston. She has been active member of the International Legal Technology Association ("ILTA") for many years speaking at the annual conference and is currently the Volunteer City Representative for Boston.