



How Technology Can Help Firms Create High-Quality Work More Effectively

ALTERNATIVE INSIGHTS: LEGAL IT HANGOUT
IN PARTNERSHIP WITH DOCSCORP

Top 3 takeaways:

- 1 Even if you have a solid template management solution, have tools in place for when users 'go rogue' and repurpose old documents.
- 2 Data security is a big issue when clients insist on using their own platforms. The ideal document management system will have extranets or collaboration spaces for clients to use.
- 3 As bundles move to a PDF format, a solution such as pdfDocs Binder will not only automate the process, but make it faster, and compliant with changing court formatting requirements.

Law firms increasingly look to technology to help them create high-quality documents more quickly and accurately.

We decided to ask a panel of IT experts from leading law firms how they used technology and workflows to create, share, and bundle documents efficiently, and the impact of remote working on document production. Our sponsor, DocsCorp, was also on the panel and offered valuable insight into the latest tech options for creating and managing legal documents. A leader in law firm document workflows, DocsCorp offers the full gamut of document-related solutions, from redaction through to the automated creation of court bundles that comply with changing requirements.

CONTRIBUTING COMPANIES



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Using Tech & Workflows to Create Documents

We first looked at how our panel firms created documents, and the kind of workflows they used to support lawyers.

Milbank has had template software for 15 years, according to Annette Brown, IT Manager at the law firm. "We use it purely for letters and internal memos. We have an agreement template that the secretaries use, but the lawyers probably don't know that it exists," she said, noting that the lawyers tended to repurpose old documents. She has now given up trying to get the lawyers to attend training on styles and formatting, opting instead to give them the tools to fix their documents: "A one button fix that gets it out the door in the 11th hour if they need it; then they go to the secretaries to put it right after that."

It's a similar story at Travers Smith, said David Cassidy, the firm's Head of IT. They do have precedents upon which the lawyers base most of their documents, but often still have to deal with documents copied, and recopied, from several years ago. "The biggest challenge is reformatting those documents," he said. "There is tech that, with one button, will fix a document, change the styles, put numbering back in. All those common help-desk calls." It's a quick-fix that also proved educational, with the lawyers themselves starting to look for the right buttons to be in the document: "The tools we use from a template management perspective allow us to put certain buttons in place for certain types of templates. If they're missing when the lawyers are working on them, there's a good sense that something's wrong and they need help."

Ben Mitchell, VP of Global Commercial Operations at DocsCorp, has talked to many law firms about the habit of building documents from a copy of a copy. "You can have a solid template management solution within your tech stack, but you have to have tools in place for when users go rogue. They will reach for the last document they used, or the one they used most frequently," he said. He reminded everyone of the ultimate objective: efficiently-created, consistent, documents that meet a firm's brand and style requirements. "We've seen a lot of firms try to force the template management issue, focusing on user education, and mandating that documents be created from that system. But you need additional tech to cater for when that scenario doesn't play out; the key is that tech has to map to workflows employed by the user," he said.

Like many law firms, Keystone Law is constructing tech-enabled workflows to remove 'grunt work' wherever possible. Maurice Tunney, the firm's Director of Technology and Innovation, described how they streamlined engagement letter creation. "We built a workflow around it so that the lawyers don't have to worry about copying and pasting," he said. This workflow is located on their platform: "They're taken through questions on what type of engagement letter it is, and certain variables are defined throughout the questions. It then produces the engagement for them in the right house style and with the right terms and conditions. They can personalise it but can't change the terms and conditions."



PROFESSIONALS
WHO ATTENDED
THE SESSION

Poll results:

- 1** Which of these solutions does your firm use? (Multiple choice)



81%
Template management

75% Document styles
47% Document drafting
25% Document repair

- 2** Do lawyers at your firm create documents from templates?



66%
Yes - we have template management software

34% Yes -we manage templates in Word directly
0% No - they don't use document templates

- 3** Have security issues, like metadata cleaning, become more prominent since remote working?



44%
Consideration has stayed the same

30% Yes, much more consideration given when sharing information
22% Yes, some more consideration given when sharing information
4% It has become less of an issue

- 4** Does your firm use document bundling software?



50%
Yes - but only a few people have access

41% Yes - everyone has access
9% No - we don't require it

Sharing Documents

Our panellists then discussed how they approached document-sharing with clients. We also looked at how remote working impacted document production and comparison, and whether lawyers became more productive as they increasingly turned to self-service.

Over the last 18 months, David has definitely seen more lawyers become self-sufficient in creating and comparing documents. Whether they are more productive is open to debate. "Sometimes we find that the quality of the documents has gone down. Also, maybe some of those mundane comparisons that a PA would have done take longer because people are fumbling their way through the software," he observed. He also saw that new client demands around document-sharing would change how Travers Smith itself worked: "Over the last 12 months, we've seen a host of new sharing solutions that clients want us to work with. Traditional email is still number one, but we're seeing this portfolio of products such as Dropbox or Box."

Maurice didn't have a definitive answer either on whether self-service led to increased productivity. "It varies from lawyer to lawyer. With experienced practitioners it's more of a struggle and we have support in place," he said. One particularly problematic outcome of client insistence on using their own platforms, in his view, was data security. "With our document management, we can have extranets or collaboration spaces. We encourage our lawyers to encourage their clients to use it. It's a known entity, we know where all that data is going to be stored and it solves the versioning problem because it's in the format they're used to," he said.

Ben has seen the pandemic result in a significant increase in collaboration platforms – with DocsCorp heavily involved on the comparison side. "Previously, a lot of secretarial staff were responsible for doing them; now the lawyers do it themselves," he said. DocsCorp has also been doing a lot of work around the inherent inefficiency of 'one-to-many' comparison workflows: "If you send a document to five people involved in the transaction, collaborating by email, how do you effectively and accurately manage the changes from five different documents into your next main working version?" DocsCorp's current comparison solution is compareDocs – the tool of choice for law firms looking to automate the notoriously time-consuming and error-prone process of looking for all changes between two versions of the same Word document. In one of those instances of tech far exceeding human capabilities, compareDocs will uncover every single insertion, deletion, or text move, even in headers, footers, and endnotes. And built-in OCR will compare scanned files.

Poll results:

5 Is there an in-house document production team within your firm?



44% No - our lawyers produce their own documents

30% Yes - but only for certain lawyers

15% Yes - they manage all document creation

11% No - another team manages document production

6 How many email security features relating to document production are already in place within your firm?



48% Alerts for public or external domains

33% Removal of metadata from email attachments

11% Alerts for CC and BCC actions

7% Alerts for incorrect redaction

7 Does your firm need to create PDF/A documents?



72% Yes - because of court requirements

28% No - we don't create PDF/A documents

8 How much guidance is given from the Courts you work with about document style requirements?



59% Some information

22% Information available but not easy to access

9% Lots of clear information

9% No information

Bundling & Submitting Court Documents

The past year has also seen courts issuing new national and regional guidelines for submitting documents. We asked our panel whether they thought that technology could make the process more secure and efficient.

The evolution of DocsCorp's court bundling solution was largely modelled from client feedback, said Ben. The new guidance on bundle formatting prompted them to embark on a research project. "We went around to the various courts – England and Wales so far – and put together a template pack. Regardless of which court you're submitting to, documents come out in the right format," he said. He encouraged attendees to check with vendors as to whether their bundle-creation tech supported the new court guidance. This becomes particularly important in light of the lack of guidance law firms are getting from courts – when we polled attendees on how much document style requirement guidance they actually received from the courts that they worked with, 59% said that they only got 'some information.' In these sorts of situations, a solution such as DocsCorp's PDF binder templates both save time and provide peace of mind when a law firm is creating PDF binders for court – incorporating compliance essentials such as a standard cover page, table of contents, folder structure, watermarks, and numbering.

With courts allowing more digital submissions, David queried whether tech was up to the scale of the size of these bundles. "It was easier when you just had to send 28 lever arch files to the court and turn up," he said. "Now you have to get that over in a PDF."

Though it's not strictly his responsibility to bridge that gap. "The Dispute Resolution team has people who will manage that process when we're about to disclose or go to court. What comes past my desk is the creation piece – 'we're struggling here,' and 'how are we going to get this from A to B,'" he said. David's point about getting bundles over to the court in a PDF must have resonated with anyone who has ever had to dig around in different locations for the most recent versions of documents and then convert and format them. DocsCorp's pdfDocs Binder – designed specifically for law firm documents such as Closing Books for court – simply automates the entire process. And it's an impressive 75% faster than doing it manually: taking care of those small, time-consuming tasks such as creating a table of contents, inserting hyperlinks and bookmarks, adding logos and footers, and applying numbering sets.

So, as people return to the office, where is document management headed? Ben thought that there would be pressure to come on to long-standing core systems for document management. "Microsoft is making a big play into legal. Teams is delivering ever more functionality. I'm seeing an increasing number of firms start to use SharePoint," he said. DocsCorp's suite of integrated solutions is a perfect fit within any organisation that uses SharePoint. Users can share and manage content using integrated



workflows for PDF bundling and document comparison. And DocsCorp's OCR processing in SharePoint makes all documents text-searchable so users can find information quickly.

Attendees left the hangout with a lot of practical insights to apply to their own workflows and document management strategies. DocsCorp's solutions offer the flexibility needed for the ongoing remote working environment. Its comparison tool integrates with iManage Work 10 (and they offer compareDocs Cloud for Office 365 on Windows, Mac, iPad, or in the browser) so lawyers can do document comparison, review, and approval on any device – securely. Just one example of how DocsCorp is in sync with the new 'work from anywhere' reality.

TECHNOLOGY



Work Smart

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DocsCorp has all the software you need to create, review, and distribute your business documents efficiently and securely. A similar user interface across the products means less of a learning curve for your teams. It also means a single source for billing and support.

docscorp.com

Our Solutions:

- **veroDocs** is a modern document creation platform that transforms the way firms assemble, edit, and collaborate on documents within Microsoft Office and Microsoft O365.
- **styleDocs** is a complete solution for document formatting and repair. It is designed to significantly reduce the time legal professionals spend trying to fix problem documents.
- **compareDocs** is a fast and accurate comparison tool that is reliable, stable, and easy to use. It significantly reduces the time needed to compare versions across multiple document types.
- **cleanDocs** offers email recipient checking, metadata cleaning, and attachment checking within a single UI.
- **pdfDocs** is a fully-featured PDF application that enables users to easily create, manage, bundle, and edit PDF files from multiple sources.
- **contentCrawler** is a server-based automated OCR and compression solution. It analyses document repositories and automatically converts image-based files to PDF, so all content is fully searchable.

Our software integrates out-of-the-box with the leading document and enterprise content management systems to streamline processes and drive business efficiency. We offer firms a combination of on-premises and cloud integrations.

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