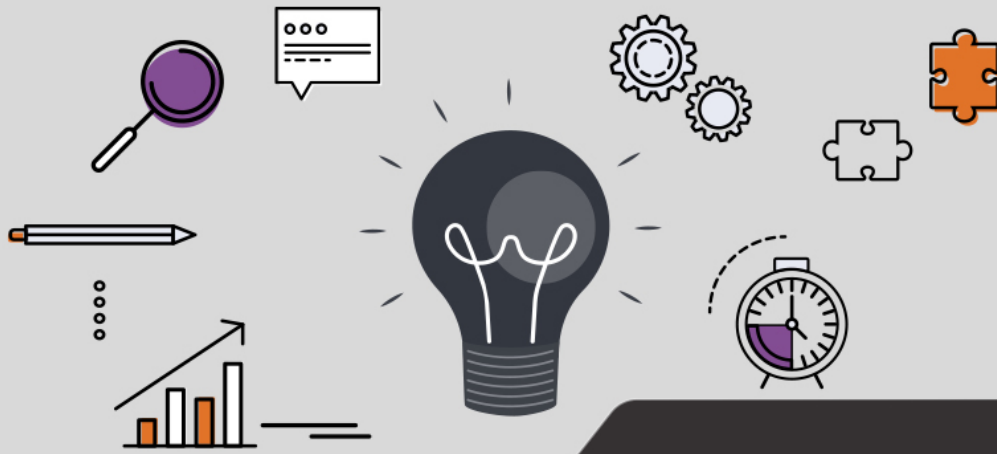


Product training by DocsCorp empowered attorneys to get more value from their software



Consolidating technology vendors

During a self-audit of its technology stack, this law firm realized half the staff were using [cleanDocs for metadata cleaning](#), and the other half a different application altogether. The firm was needlessly paying for two products that effectively did the same thing.

To simplify product support, invoicing, and training, the firm wanted to consolidate everyone onto cleanDocs since it was using [compareDocs for document comparison](#).

Getting everyone up to speed with cleanDocs

User training was an essential part of transitioning everyone over to cleanDocs. The firm's legal administrator explained that "our account manager reached out to us to see how we were going with the products. It was during this call that he offered to organize some training sessions for the team."

cleanDocs has, by design, a simple user interface. So, the training was meant to familiarize the users with how they could interact with the Outlook add-in and make cleaning decisions based on different contexts.

"The cleanDocs training webinar was so well-received," the legal administrator said. It explained the different prompts – such as whether to accept and delete Track Changes or anonymize them during the document review phase – and output options like converting the cleaned attachments to PDF.

The firm's IT systems technician explained that the most-used metadata cleaning policy removes everything but Track Changes. "This, as a standard policy, has been working well and proven to be enough for most people when it comes to metadata cleaning." As the application administrator, they can create contextual cleaning policies for different departments – or even individual users – who require more flexibility in cleaning decisions or need a totally clean document.

Since that training, the firm has been able to convert everyone over to cleanDocs successfully.



Legal

Training

Support

Learn about:

Delivering product training to busy attorneys

Transitioning a firm onto a single metadata cleaner

Ensuring staff know how to use the latest and greatest features

Gaining access to product training materials and user guides

“*If you can get the attorneys to give up one of those billable hours for training, they can save so much time and create so many more efficiencies when using that product.*”

“The DocsCorp team followed up with [recordings of the training webinars](#) as well as additional handouts and user guides,” the legal administrator explained. “It’s wonderful to have all those training resources on-hand. I’m able to pass them on to people for troubleshooting and share them as part of our onboarding program for new hires.”

They also observed that using cleanDocs before the training was like “buying a Cadillac but driving it like a Volkswagen Bug. You’re only using the basics, but you know there are things under the hood that you would use if you just knew what they were. Now that we’ve had that training, we’re able to take advantage of everything cleanDocs has to offer.”

Refresher course for compareDocs users

Since the firm was already engaged in training for cleanDocs, it made sense to bring everyone up to speed on compareDocs at the same time.

The firm had been using compareDocs for document comparison “forever,” but the legal administrator suspected there might have been new features added that the attorneys weren’t up to speed with. One of those was the ability to compare Excel spreadsheets natively.

compareDocs analyzes Excel files in their original format, which produces a more accurate result than other applications that first convert them to PDF. Users can view the changes in a side-by-side comparison report or export the results to an Excel workbook with pre-filled columns: Sheet, Range, Old Value, New Value, and Description.

“Being able to [compare Excel spreadsheets](#) helps our Title Department leaps and bounds. It’s a workflow that makes them more efficient. If the applications make them look good, then the firm looks good. It’s an all-around beneficial setup...if you can get the attorneys to give up one of those billable hours for training, they can save so much time and create so many more efficiencies when using that product.”

Support when it’s needed

Technical support, like product training, is a significant factor in the success of software applications. Due to the time-sensitive nature of the work, legal professionals can’t afford to experience delays because software isn’t working reliably or as expected.

When this firm needed technical support from DocsCorp, the IT systems technician explained, “the DocsCorp Support team was helpful and quick to respond. Whenever I’ve needed assistance, they’ve been there – which is really all I can ask.”

DocsCorp Support is global but with a local reach. Support centers are in North America, the UK, and Australia and operate 24 hours a day from Monday to Friday. [Go here to learn more about our Support.](#)