

Affording Document Assembly: the Group Approach

By Seth G. Rowland

As a document assembly consultant, I am often contacted by solo or small attorney firms who are overloaded with work, champing at the bit to get a Document Assembly system, realize the value but are understandably nervous at the cost. And, they should be. Creation of a good document assembly system is expensive in both time and money. Your law school education wasn't cheap, setting up your office wasn't cheap and setting up a potential profit generating document assembly system that will become absolutely integral to your practice won't be cheap either.

So what do you do – bite the bullet and get your money back on the ROI or give up. Here's a possible third solution – Group development. Two or three lawyers with similar practices might be able to create a system that all of them can use and share the development cost. This, of course, requires collaboration, cooperation and a willingness to compromise. It's a midpoint between buying a pre-canned system and getting one custom made for your own needs.

If you decide to go with this approach, the first thing you should do is find a developer to build it for you. It's a very bad idea for 3 or 4 busy lawyers to try to build pieces of a document assembly system and hope they'll hang together properly. You need a central expert who will advise your group, develop the templates and interviews and make sure everything works with everything else.

After that, devising a group document assembly system is similar to devising one for a single firm. You need to determine the universe of documents that will be automated, set up meetings with the developer and designate an expert from your group to work with the developer. For the period of development, think of your group as one firm.

Some ideas for setting up your group:

1. **KEEP IT SIMPLE.** When choosing the attorneys for your group, stay in your area of expertise. **DO NOT** grab the real estate lawyer from down the street, the PI guy from next door and the estate lawyer from down the hall. These are very different areas of law with very different automation and document gathering needs. Stay within your area – if you're basically a PI litigation firms, go to other PI lawyers to make up your group.
2. **KEEP IT SMALL.** It may seem that a system like yours would be good for the 20 other PI lawyers in town. Ever been in a meeting with 20 people? Doesn't work very well for general consensus, does it? Don't bring in more than 4 other attorneys.

The bottom line is – We, Basha Systems have been in business since 1996. In that time, we have never seem anyone remove or stop using a document assembly system. Once they're built, people use them and use them. So, if price is what's stopping you . . . try the Group approach to keep your costs in line.