Top Five Essential Document Assembly Features in Practice Management Software

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Documents are the lifeblood of law firms. Whether used to memorialize an agreement, define the terms of a lease, set forth an estate plan, commence a legal action, or communicate with a client, most documents are "assembled." What does that mean? It means that lawyers like you typically use "model" or "standard" forms with predictable inputs and definable options.

If you don't use an "automated" system to create documents, you place your firm at a disadvantage vis-à-vis your competitors in terms of efficiency and revenue. Document automation is a staff multiplier. The efficiency gains from automation enable the same staff to produce more documents, driving profits and enabling you to undercut your competitors.

The software required for document assembly is readily available — if you own a word processor like Word or WordPerfect, you already have the ability to create merge templates. You can use specialized software such as HotDocs to handle rule-based assembly, including optional clauses and scripts.

However, the true potential of document automation is when you tether your templates to a practice management system because you will find that:

- Your practice management system can automatically fill in many of the blanks in your template.
- There is no need for dual entry of data.
- Documents you create automatically link to the matter.
- Reduces the chance for errors.

This workflow means better, more consistent documents, produced faster generating more profits per open file. But not all practice management systems are created equal. Below you'll learn about the five essential features you need for document assembly using your practice management system.

1. Automated Merge Templates

Using your practice management system, you should be able to easily convert any document into a merge template. Typically, you would first designate a "data-source" like an Excel worksheet or a text file and then add merge-fields into your template that reference the data source. But where are you going to get the data to perform a merge? Are you going to "type" the data into the data-source? That's "waste of time" when your practice management system already has that information.

The practice management system should enable you to perform a merge directly. In creating the merge, you should be able to select multiple contacts or multiple files as a data-source for the merge. Data on the contact or case record should be usable for the merge. Typically, you perform this task via a toolbar that displays the available fields in the system. Place your cursor in the document where you want the information to appear, and then click on the toolbar. A list of available fields should appear. Click Enter.

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2. Custom Fields or Related Records

If you are sending out a newsletter or mass mailing, a contact's name and address will do. But if you are creating legal documents, you will need to know about court dates, lease terms, client preferences, etc. This additional detail will entail adding custom fields to your contact or matter records in your practice management system.

The benefit of adding custom fields is three-fold. First, you can have a standardized file intake procedure for each

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file type to make sure this vital client or case information is gathered. Second, because this data resides in your database, you can report on this information across all your contacts or files. Finally, you can create filters to define a select list of contacts or files using these custom fields in your search to use for document assembly.

Your practice management system should enable you to use these customized fields as part of your merge. They should be available when you click on the toolbar to insert into your template. Ideally, they should be organized in an easy to understand fashion. Alphabetical is fine if you know the field name. However, having custom fields organized by type of file can make it much easier to create the template.

A typical merge will only let you enter "one record" per merged document. And yet, on a typical case file, you may have several parties on the file, each with their own address that you need to use in a client communication. For example, you may want to summarize a series of court dates. A practice management system that enables you to merge this data into the document can be a major time saver.

For complex tasks your practice management system should integrate with specialized software such as HotDocs.

3. HotDocs Integration

A merge template is limited. You can merge data into a static text document, use basic "IF" statements — *{IF MoneyIsOwed = "yes", "a balance is due", "a credit is due"}* — and ask single-prompt questions. However, if you are creating a complex document, you will need more power. You may have additional questions. You may want to make whole paragraphs conditional, and embed in some paragraphs optional language. You may want to run calculations. For complex tasks your practice management system should integrate with specialized software such as HotDocs.

You may already have created your HotDocs templates. You may have purchased some HotDocs forms. Or, you may decide to create your own. Whatever your situation, there is no reason to have to re-enter information in a HotDocs interview that you have already entered into your practice management system. Your practice management system should be able to "map" the fields used in a HotDocs template to its own fields. You should also be able to select a single matter (or group of matters) and assemble the document.

The practice management system should enable you to create a merge template that will be sent via email to your client, prospect or opposing counsel.

4. Custom Field Mapping

You may have already created a set of merge templates or purchased one already. You may have HotDocs templates that each use different field names for the same data. In these cases, you will not want to have to rebuild these templates with a new set of fields. Such a process can be quite time consuming.

Your practice management system should enable you to "map" the fields in the database to the fields that you already have in a particular merge template or HotDocs template. By using a custom map and linking it to the merge template you can rapidly transition from a "stand-alone" system to a system that is closely tied to your current client and matter information.

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5. WorkFlow Automation and Email Templates

Document assembly is not just for documents. Lawyers send all sorts of detailed information via email. Much of this information is a summary or extract from information in your practice management system. The same technology that can be used for Word merge templates can also be used for email.

The practice management system should enable you to create a merge template that will be sent via email to your client, prospect or opposing counsel. The email template should have access to standard and custom fields. And it should have a workflow engine to automatically send such email merge as part of a task or event.

Conclusion

Whether you are considering a new practice management system, or working with an existing program, you owe it to yourself to familiarize yourself with its document assembly features. The return on investment will pay for itself. The profits from a properly implemented document assembly system integrated with your practice management system will cover the combined cost of template development and the practice management system in a matter of months.

Seth Rowland, Esq. was named TechnoLawyer Consultant of the Year in 2002 for his contributions to TechnoLawyer on the subject of document assembly and law practice automation. He is a nationally known technologist whose company, Basha Systems LLC (www.bashasys.com), has helped many law firms build customized practice management and workflow solutions. Please feel free to visit his blog (www.bashasys.info) for the latest on document assembly and practice management.

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