

Why Your Law Firm Needs a Template Management System

By Michael Barrons



EXECUTIVE SUMMARY

PROBLEM

The documents you create are ambassadors for your law firm. Homegrown Word templates in a document management system are difficult to maintain. This results in poor adoption as some users go rogue by necessity and recycle older documents.

SOLUTION

A Template Management System is an automated solution that integrates with Microsoft Word,

standardizes document creation, and enforces firm branding guidelines and other best practices. Users appreciate the ease of use and time savings it offers.

KEY FEATURE

Your shopping list should include advanced template creation and version control, easy access to templates from within Word, enforced template use, and built-in document automation to reduce the risk of errors and improve staff productivity.

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Almost every law firm uses templates to simplify document creation and promote brand consistency. The larger the law firm, the larger and more diverse the template collection. Over time, a template collection can grow so large that it becomes difficult to manage.

While building out templates for your firm can help standardize the look and feel of your documents, providing access to them and maintaining version control can also prove challenging. Macros and other tools that law firm IT departments build into their templates can cause further challenges with maintenance and compatibility, especially when updating desktop applications and setting up new users.

Too commonly, these problems result in poor adoption of templates. End users in your firm recycle older documents, creating a whole set of additional risks if they forget to change key information such as a client name.

This Learnpaper explains how your firm can succeed with templates by using a Template Management System.

What Is a Template Management System?

A Template Management System is a document creation platform — ideally integrated with Microsoft Word — that enables law firms to standardize document creation processes, enforce best practices, and effectively implement firm branding guidelines. The components typically include:

- Firm branded templates.
- Document automation technology.
- Specialized formatting and editing tools.
- Administrative console to add, update, and manage templates.

A Template Management System:

- Maintains version control.
- Ensures easy access to templates through Word.
- Enforces the use of templates.
- Improves the overall quality of documents.
- Improves staff productivity and client service.

Let's explore the key benefits in greater detail.

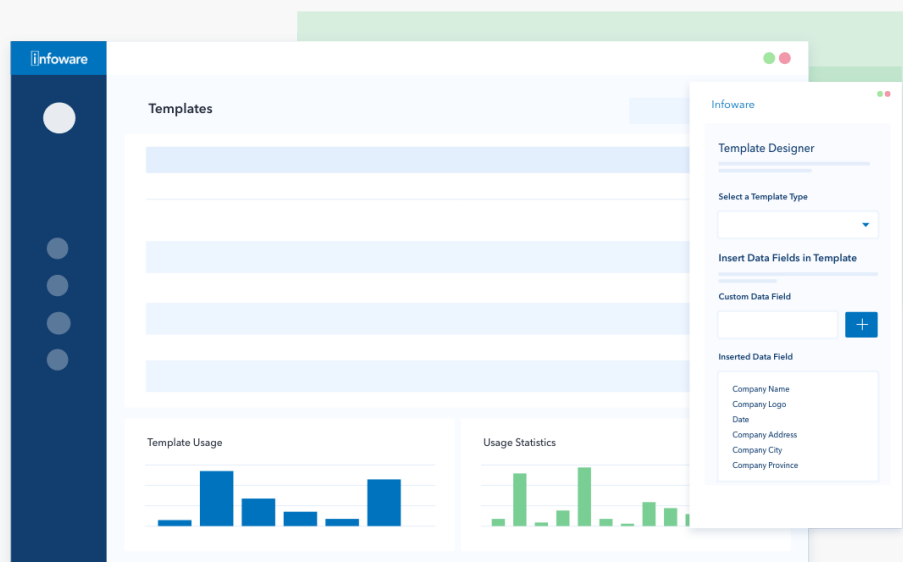


Figure 1.
A Template Management System contains all your firm's templates and the tools to build them.

1. Standardization, Consistency, and Branding

The documents your firm puts out into the world reflect on your firm. Clients and others will judge you. Producing professional-looking documents helps your firm establish itself as a leading practice, enhancing its image and projecting value to prospective clients.

Accordingly, you should never allow any detail to be governed by guesswork. No one should have to figure out the font size for headers or wonder if their numbering scheme is correct. From styles to signature lines, all your firm's document standards and branding should be baked into every document template in accordance with the preferences of your firm's leadership and document experts.

A Template Management System uses legal-specific formatting tools to provide this consistency and branding. Administrators can globally change templates and easily publish

them to the entire firm in one go. Eliminating guesswork saves time and money, reduces risk, and provides more value to clients (they'll likely notice this consistency too).



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Essentially, a Template Management System embeds your firm's knowledge and standards, making standardized document workflows the norm.

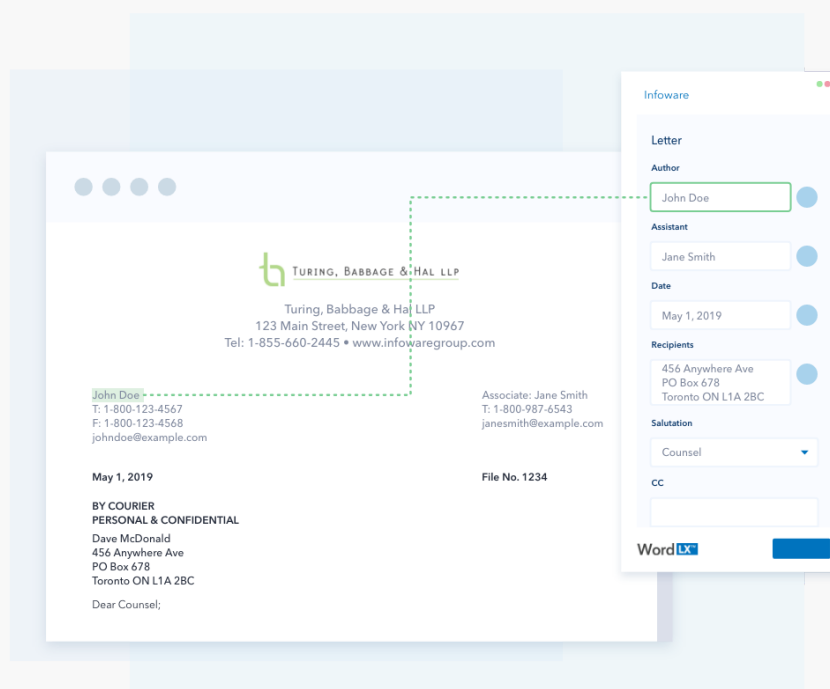


Figure 2. Ideally, a Template Management System should include document automation technology.

2. Document Quality, Risk Mitigation, and Automation

Even more important than the look of your documents is their content. Client information, firm information, and clauses require consistency from document to document or major issues could follow. The wrong address, a misspelled last name, the incorrect deed number, etc. could lead to a losing effort and malpractice risk.

When a Template Management System contains built-in document automation technology, administrators can add variables and placeholders to the templates. Users enter information such as a party name only once and it populates throughout the document.

As well, law firms hold a lot of client information and it is critical that this remains private. Reusing

an old template dramatically increases the risk of inadvertent disclosure in the content itself or in the underlying metadata. By contrast, a Template Management System ensures that users start with a clean template each time devoid of any confidential material. See Figure 1.

When a Template Management System contains built-in document automation technology, administrators can add variables and placeholders to the templates. Users enter information such as a party name only once and it populates throughout the document. This eliminates the need to repurpose old documents, ensuring document quality and consistency across your firm. See Figure 2.

3. Improved Efficiency and Alignment with Word

Upwards of 90% of legal professionals use Word daily, many spending 4-6 hours in the program. To meet the demands of clients, your staff and lawyers need to work smarter and faster in general, but especially in Word.

Letter Drafting Speed Test

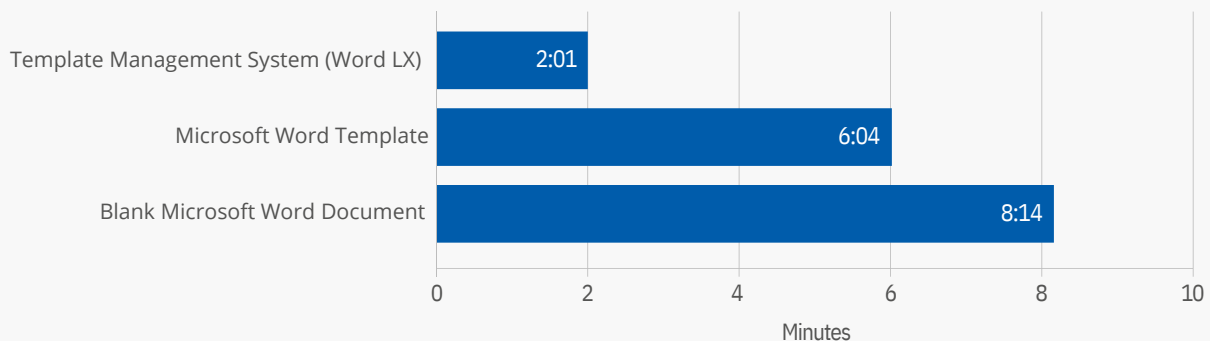


Figure 3. Results of letter drafting speed test run by TechnoLawyer.

A **Template Management System** creates more efficient workflows for your firm because the entire document creation and automation process resides in one solution integrated into Microsoft Word. This is a more streamlined way to proceed than to cobble together several different products such as a separate document styler, document automation system, etc.

Without leaving Word, users can quickly find a template and insert the data with all the formatting handled automatically. No more searching through network drives or document management systems for a reference document, tediously editing it, and then saving it somewhere else that a colleague may not find in the future.

By way of example, TechnoLawyer recently tested three methods of drafting a letter in Microsoft Word — (1) starting with a blank Word document, (2) starting with a Word template, and (3) using a Template Management System that integrates with Word (Word LX). As you can see in Figure 3, the Template Management System was three times faster than using a Word template and four times faster than starting with a blank Word document. ***See Neil J. Squillante & Warren Christopher Freiberg, The Fastest Way to Draft and Print Correspondence in Microsoft Word: Three Methods Compared.***

Clearly, a Template Management System saves time, reduces errors, and allows lawyers and staff to become even more productive in the software they use every day. Aligning all the processes with Word's functionality is a huge efficiency improvement.

Conclusion

Today's clients demand more value for their money. Firms must adapt to remain competitive. Thankfully, technology is advancing incredibly quickly but this can also make it difficult to figure out your next tech step.

Given the number of documents your firm generates, standardizing your document creation processes, streamlining document workflows, ensuring document quality and consistency, and improving efficiency and productivity will pay dividends for years. The best way to achieve this is with a Template Management System.



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Meet Michael Barrons

Michael Barrons is Vice President of Marketing and Operations at Infoware, a leading developer of document automation solutions for the legal industry. A seasoned product marketer and business leader, Michael has a long track record of success in developing and deploying industry solutions that deliver value for customers. Michael received his MBA from Dalhousie University and B.A. in Political Science from Western University.

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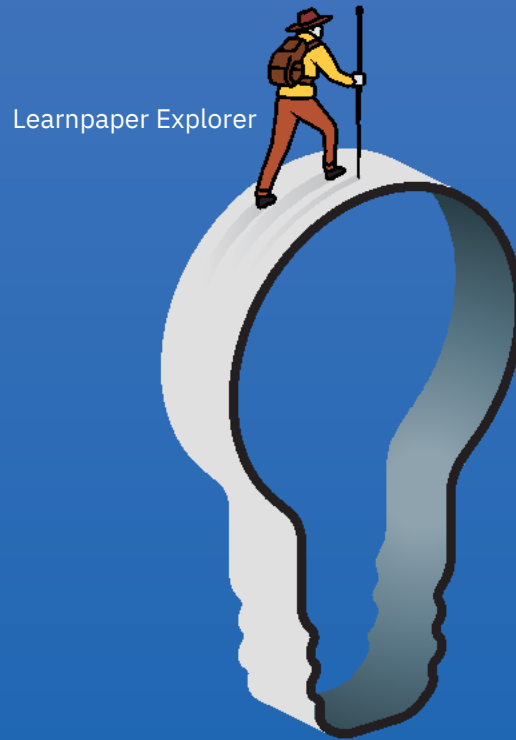
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