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## **DocXtools @ Work**

*How Law Firms Resolve Document Problems  
Faster to Prevent Client Service Issues*

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## Executive summary

Most law firms experience the same document production irony – as lawyers collaborate more with clients on legal documents, more document problems arise to negatively impact client service. These problems are compounded by the daily realities of the legal business – from mergers and acquisitions to desktop upgrades and clients using different versions of Microsoft Word.

More than 250 leading law firms – including over 70% of the global top 100 firms – maintain high-performance document production environments using DocXtools and other Knowledge Partnership components. Lawyers at these firms, and their support staff, are empowered to quickly resolve the document problems that degrade client service and damage a firm's reputation.

DocXtools, part of the software component of Knowledge Partnership, provides law firms with the exact document assessment and problem-solving tools needed to quickly produce high-quality, Word-based work product. Knowledge Partnership helps firms resolve document problems more productively using a proven combination of software, services and support.

Solve a wide range of document production problems faster, including:

- Comparison failure
- Broken cross-references
- SEC/EDGAR preparation
- Template maintenance
- PDF readiness
- Skills assessment & training effectiveness

How might your firm resolve document problems like these in less time?  
Read on to learn more.

Have an urgent document problem? Contact us now at (630) 598-1100 or [sales@microsystems.com](mailto:sales@microsystems.com).

## Transaction documents – Keep deals on track

With multi-billion dollar deals often on the line, corporate practice areas must be empowered to rapidly resolve problems with deal documents. DocXtools, a toolbar within Microsoft Word, simplifies complex document issue resolution routines to a single button.

### Comparison intervention

Many firms provide their lawyers with a one-click DocXtools solution to resolve the comparison problems that inevitably arise when a document is collaborated on with clients:

- **Quickly resolved comparison problem on multi-billion pound deal** – While working on a Monday bank holiday, a medium-sized UK firm attempted to perform a DeltaView comparison on a complex, 700-page transaction document with 150 tables – and it failed. Because the document was promised to the client on the following Tuesday morning, the law firm had to achieve a successful comparison quickly and without the assistance of support staff. Using DocXtools, the lawyer prepared the two Word documents for a successful comparison in a matter of seconds. With the redline successfully created, the multi-billion pound deal – representing millions in legal fees – stayed on track to meet client expectations.

## Rebuilding cross-references

To avoid delays and reputation-damaging embarrassment, transaction groups must ensure that fragile document cross-references function properly:

- **Eliminated embarrassing broken cross-references** – The real estate practice of an Am Law 50 law firm suffered embarrassment when it sent its largest client a document with broken cross-references. Vowing never to repeat that same mistake, the firm deployed DocXtools to its secretaries, word processors and help desk. With the solution, the firm has never repeated the embarrassing mistake. And its document production team reduced by 70% the time spent repairing broken cross-references.
- **Repaired 60 hour “lost cause” document in less than two hours** – The word processing group of an Am Law 100 New York City firm attempted unsuccessfully to clean-up and repair a large, complicated deal document from the firm’s mergers & acquisitions group. Word processing decided that the document, which included hundreds of broken cross-references, was a lost cause. The support team re-keyed the entire document – a task that took a total of 60 man-hours, including 20 hours of overtime. After this painful, time-consuming support event, the firm sent the original “lost cause” document to Microsystems to explore better options for future events. Microsystems salvaged the document using DocXtools and returned the repaired document less than two hours later. Based on that experience, the firm sent three additional “lost cause” documents before re-keying them. In each case, Microsystems successfully salvaged the documents – saving the firm approximately 180 hours of word processing time while reducing the risk of content omission.

## Scanned document clean-up

The document collaboration workflow at most firms includes creating new documents based on scans of hard copy legal content sourced from outside of the firm. To avoid needless bottlenecks when repurposing this content, firms are automating the majority of this process:

- **Reduced clean-up time for scanned documents by 85%** – A boutique East Coast mergers and acquisitions firm discovered its secretaries struggled to clean-up and restyle scanned documents. Using DocXtools,

the secretaries realized an 85% reduction in clean-up time per scanned document.

## SEC/EDGAR filing

To improve service to publicly-traded corporate clients, firms are developing SEC/EDGAR filing expertise in-house to become expert at efficiently and comprehensively preparing these documents:

- **Eliminated the need for SEC document preparation outsourcing** – An Am Law 50 law firm responsible for the repurposing and preparation of 10-K, 10-Q and other SEC forms for its publicly-traded corporate clients experienced mounting pressure to complete that work internally. Outsourcing this work to a service bureau not only incurred costs the corporate clients were increasingly unwilling to pay, but added unnecessary time to an already tight turnaround schedule. Using DocXtools, the firm reduced by 88% the time needed to clean-up and reformat a new SEC document for electronic filing via EDGAR.
- **Reduced time-to-lawyer from 36 hours to 8.5 hours for critical EDGAR document** – An Am Law 200 law firm often required scanned 10-K's to be reformatted into editable Word documents. The firm used a typical 230-page document with 67 tables as the baseline for improving the document "time-to-lawyer" – as the task had previously taken two shifts a total of 36 hours to accomplish. The firm utilized Microsystems methodologies, techniques and DocXtools to reduce this time to a manageable 8.5 hours. Future "scan & clean" requests benefited from this process redefinition, thus improving external client service for this large M&A practice group.

## General document problems and corruption

Transactional practice areas – facing growing document corruption and formatting problems due to increased document complexity and high amounts of collaboration with its clients – must prepare for any and every document issue to keep clients happy:

- **Identified and resolved serious issue with document corruption** – A medium-sized law firm began experiencing document corruption on large, complex corporate transaction documents. The firm initially utilized the Microsystems Document Emergency Room to diagnose the root cause of the problem. Next, the firm received a DocXtools-based detection and repair process. As a result, the firm needed only minutes to tackle corruption problems on these documents. And the corporate practice area no longer feared missing client deadlines due to corruption problems.
- **Preserved knowledge repository integrity** – An Am Law 200 firm with a prolific corporate practice group identified the need to create a "know how" repository of precedent documents. The firm awarded lawyers with billable hour credits and other awards to submit work product to this burgeoning library. Unfortunately, with a focus merely on the content, the document's formatting did not align to firm standards. When such precedents were reused, errors – such as failed comparisons, problematic

printing and inability to renumber, generate tables of contents and cross-references – became an unavoidable part of this valued content. Microsystems helped the firm create a one-click "KM Ready" button, which practice area personnel executed against documents prior to delivery to clients, thus automating compliance tests and facilitating necessary repairs.

- **Optimized document collaboration with Word 2007 early adopters** – After struggling to open a Word 2007 .docx document sent to it from a major public finance client, an Am Law 100 law firm turned to Microsystems for best practice guidance. The firm needed to understand how best to collaborate on documents in the Word 2007 .docx format that arrived from outside the firm. Microsystems sent the firm a complete set of Word 2007 “jumpstart” materials. The jumpstart kit included a collection of sample .docx documents which the firm’s word processing and training groups used to test and refine a Word 2007 collaboration workflow.

## Deal monitoring

The most forward-looking transaction groups are moving beyond reacting to last-minute deal document problems by developing early warning systems:

- **Proactively minimized deal delays** – By quickly and accurately assessing the quality of document collections, DocXamine acts proactively as an “early warning system,” exposing documents that require document clean-up before they are required to be filed with a court or expected to arrive at a client. Throughout the gestation period of each deal, an Am Law 100 law firm with an important mergers and acquisitions practice area periodically runs the corresponding set of deal documents through DocXamine. This identifies any document issues long before a deal’s closing – where document issues became document emergencies in the past.

## Litigation documents – Prevent filing delays

In addition to addressing many of the document problems above, litigation groups are also using DocXtools to meet filing deadlines and boost the productivity of their document experts:

## Corrupt tables and inconsistent styling

- **Protected against missed deadlines and unnecessary overtime** – The word processing group of a medium-sized California firm found itself struggling with a critical document that required filing with a US District Court by the end of the day, or the lawyer faced sanctions. The document often crashed, and when able to be opened, suffered from corrupt tables and inconsistent styling. One hour before the filing deadline, the firm’s word processing manager forwarded the document to the Microsystems Document Emergency Room. Microsystems used DocXtools to quickly analyze the document, determine the primary source of the document’s

instability and fix the document. Thirty minutes later, the firm received the fixed document, which was then filed on time with court.

## Document clean-up and reformatting

- **Enhanced firm “document expert” productivity** – An 85 lawyer intellectual property firm deployed DocXtools to its document experts. On average, this toolbar increased productivity for the in-house document production team by 68%, and had the added benefit of increasing employee retention. The “Expert” toolbar reduced the time spent on cleaning-up and reformatting a 20-page patent & trademark document from six hours to 20 minutes.

## Firm document standards – Maintain client service levels

Providing your firm’s document experts with the most sophisticated document problem resolution tools boosts productivity dramatically. Common problems are tackled in a few clicks so document experts can move on to more challenging document issues.

## Document restyling

- **Greatly enhanced nighttime word processing** – A large New York City firm determined that its nighttime word processing staff spent 50% of its time repairing documents. With a 10 person staff and an annual cost per person of \$75,000, the firm spent \$375,000 annually on this team just to clean-up and restyle documents. Using DocXtools, the night time word processing staff reduced by 70% the average time required to fix a document, thus freeing up \$262,500 worth of time to be allocated to other word processing activities.

## Template maintenance

- **Ensured template formatting and styling quality** – As part of an upgrade to a new version of Word, a medium-sized UK firm updated its collection of firm templates. But during this template maintenance, the firm inadvertently introduced errors such as broken numbering. With DocXtools, the firm thoroughly analyzed the templates, identified the errors and applied the suggested automated repairs. The firm estimated that it saved 500 man-hours – and approximately 20,000 pounds – worth of clean-up work using DocXtools. It also identified and addressed document issues it would have never caught otherwise.
- **Empowered lawyers and secretaries to keep documents healthy** – While moving to Office 2003, an Am Law 200 law firm needed to improve document quality by refining its existing workflow for reusing documents. The firm provided its lawyers and secretaries with a one-click DocXtools solution to reduce the risk of including incorrect or out-of-date content in reused documents. The firm’s lawyers and secretaries reduced by 75% the time spent repurposing documents received from outside of the firm into properly styled firm documents. This resulted in improved end user productivity, better document quality, enhanced client service and reduced document risk.

## PDF readiness

- **Ensured high-quality PDF documents are delivered** – A top 25 Canadian law firm adopted a policy of only sending its legal documents in PDF format. But the firm’s clients complained about the quality of the PDFs – including missing content, invalid URLs and broken cross-references. Fearing that its reputation was being tarnished by these poor quality PDF documents, the firm provided its end users with DocXtools. Using DocXtools, a lawyer quickly analyzes the “PDF readiness” of a Word document for nine key qualities that impact the document’s ability to become a readable PDF. If any problems are found, the lawyer easily navigates to the offending areas in order to repair the document and prepare it to generate a readable PDF document.

## Skills assessment & training effectiveness

Another Knowledge Partnership software solution, DocXamine enables a law firm to analyze the quality of its work product and the abilities of support staff to produce documents that comply with the firm’s document best practices. DocXamine enables firms to zero in on the root causes of document problems:

- **Reduced risk of an unqualified secretarial hire and delivered more focused new hire training** – Given limited new hire training time, an Am Law 100 law firm desired an automated, easy-to-use method that it could deploy to each of its eight offices to assess the Word skills of prospective secretarial hires and identify areas of focus for new hire training. With Microsystems’ assistance, the firm developed a skills assessment test based on its own document environment and best practices. Because the skills assessment test can accurately measure document production skills, the firm minimized the risk of making an unqualified secretarial hire and targeted individual weak spots for its trainers to address with secretaries who are hired. The firm estimates that it saved the expense of making four bad hires a year.
- **Accurately measured training effectiveness** – During its most recent Microsoft Office upgrade, an Am Law 50 law firm discovered an increase in the number of Word documents being sent to the help desk. Further examination uncovered that many of the firm’s secretaries were under-utilizing the document assessment and clean-up capabilities of DocXtools. With assistance from Microsystems, the firm developed its document clean-up and reformatting training program, building a tailor-made series of training modules that feature DocXtools. The program included a pre-test that determines which classes each user takes, and a post-test to quantify comprehension of the course material from the training program. DocXamine provided automated assessment and reporting of both tests. With the new training program, the firm experienced a significant increase in documents repaired at their source. This result was predictable given that the firm measured a 57% average secretarial improvement from pre-test to post-test.
- **Delivered more highly targeted training programs** – DocXamine exposes opportunities for focused training by analyzing a document

collection against a law firm's set of document best practices in order to identify issues found in those documents. On a semi-annual basis, the training department of an Am Law 200 law firm pulls collections of recently created documents by practice area, and uses DocXamine to analyze those documents to assess adherence to firm best practices. With the resultant DocXamine reports, the training manager is able to quickly identify the specific document trouble spots by practice area. The training manager then creates a schedule of training courses targeted specifically to each practice area's needs. This ensures that limited training time is used wisely.

## Improve document production with Knowledge Partnership

Microsystems Knowledge Partnership helps law firms resolve document problems more productively using a proven combination of software, services and support.

Improve your document production performance in three ways with Knowledge Partnership:

- **Produce higher-quality documents** – Knowledge Partnership software, such as DocXtools and DocXamine, empowers your lawyers and support staff to produce corruption-free documents that are formatted and styled according to your firm's document best practices.
- **Streamline document production workflows** – Knowledge Partnership training and consulting services help your firm streamline document production processes to dramatically boost productivity.
- **Support last-minute document problems** – Knowledge Partnership support provides your “safety net” when document issues require level 3 help, resolving issues within two hours or less to help you meet critical client deadlines.

## About Microsystems

Microsystems is the leader in providing complete, “first draft to final delivery” document lifecycle solutions to the legal and life science markets and other document-intensive businesses. Microsystems provides more than 650 law firms and pharmaceutical companies with an innovative combination of software products, consulting services, and knowledge transfer sessions designed to improve the total document creation, quality control and delivery processes. [www.microsystems.com](http://www.microsystems.com)

Microsystems is headquartered near Chicago in Downers Grove, IL.