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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 650 leading law firms – including over 70% of the global top 100 firms – maintain high-performance document production environments using Microsystems DocXtools. 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 provides law firms with the exact document assessment and problem-solving tools needed to quickly produce high-quality, Word-based work product. DocXtools firms resolve document problems more productively using a proven combination of software, services and support.

DocXtools helps firms 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.

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, which performs from 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:

- **UK firm troubleshoots document comparison with DocXtools and meets client deadlines.** 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:

- **Am Law 50 firm provided its secretaries, word processors & help desk with tools to prevent embarrassing document problems and reduces the time spent repairing broken cross-references by 70%.** 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.
- **Am Law 100 NYC firm uses the DocER, which 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:

- **East Coast M&A firm’s secretaries reduced document clean-up time 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:

- **Am Law 50 firm eliminated the need to outsource SEC document preparation to a third-party consultant.** 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 eliminated its use of a third-party vendor and reduced by 88% the time needed to clean-up and reformat a new SEC document for electronic filing via EDGAR.
- **Am Law 200 firm 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

All types of 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:

- **Dechert partners, associates & secretaries check document health in one click, helping the firm reduce document emergencies & corruption.** Dechert partners, associates and secretaries were experiencing document corruption issues on a daily basis. The firm deployed the DocXtools Document Check button to its partners, associates and secretaries, enabling them to identify document problems and instability in advance of filing and delivery deadlines. By enabling these Word users, the firm reduces its document emergencies and corruption and as a result, reduced the risk of missing a filing date or client deadline.
- **Clifford Chance enabled each of its 7,300 Word users with a way to ensure documents are of the highest quality.** Like most firms, Clifford Chance experienced document corruption. In the effort to reduce document corruption and lower document support costs, the firm deployed Microsoft Office 2007, Microsystems Legal TemplatesPlus, D3 and **DocXtools** software to each of its Word users. DocXtools enables each user to convert a document received outside the firm into Clifford Chance styles in one click, compare documents in native Word and fix broken cross-references. The enablement of all of its Word users helps increase the quality of documents, leads to improved client service and collaboration within the legal community and also helps the firm lower its document support costs.
- **Medium-sized firm uses DocER to identify root cause of document corruption.** A medium-sized law firm began experiencing document corruption on large, complex corporate transaction documents. The firm initially utilized the Microsystems DocER 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.
- **Am Law 200 firm improves client service with a button that applies formatting in one-click.** 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.

Deal monitoring

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

- **Am Law 100 firm analyzes sets of deal documents to avoid document issues and emergencies.** 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. 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. DocXamine helps the firm identify 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

- **Mid-size California firm uses the DocER to avoid lawyer sanctions and meet court filing deadline.** 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 DocER. 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

- **IP firm reduced document clean-up time of a 20 page doc from six hours to 20 min.** 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 sophisticated document problem resolution tools boosts productivity dramatically. Common Word problems are tackled in a few clicks, allowing document experts to move on to more challenging document issues.

Document restyling/quality control

- **NYC firm saves \$262,500 in document quality control costs.** A large New York City firm determined that its night time word processing staff spent 50% of its time repairing documents. With a ten person staff and an annual cost per person of \$75,000, the firm spent \$375,000/year on this team just to clean-up and restyle documents. Using DocXtools, the night time word processing staff reduced the average time required to fix a document by 70%, freeing up \$262,500 worth of time to be allocated to other word processing activities.
- **Kilpatrick Stockton saves \$193,000/year in document quality control costs.** In an effort to reduce costs, increase efficiencies, and maintain the highest level of client service, Kilpatrick Stockton analyzed the value of DocXtools. The firm has been using DocXtools since 2001. Kilpatrick's Word Processing Resource Center documented its use of DocXtools for two weeks to quantify its value. The research results concluded that the firm saves over 4,500 hours a year, or 2 ½ hours per job with DocXtools, equating to \$142,000/year. Shortly after the value-analysis took place, Kilpatrick Stockton decided to reduce its Resource Center's support coverage from 24 hours a day to 18.5, saving the firm another \$50,000+ per year, bringing the total savings to over \$193,000 for one year alone.
- **Oppenheimer increases efficiency of lawyers and secretaries with one-click "Make it a Firm Document" solution.** With the DocXtools "Make It a Firm Document" button, the firm's lawyers and secretaries are empowered to repurpose legacy work product into Oppenheimer documents that they can provide to clients with full confidence in their stability and health. Repurposing a document used to take 20 minutes, but now takes less than 5 minutes. This saves the firm several hours a day. In addition, because the required training on how to repurpose documents with this button is minimal, the firm was also able to reduce its training burden.
- **Am Law 200 firm's lawyers & secretaries repurpose documents from outside of the firm into properly-styled firm documents in one click, saving 75% less time.** 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 the time spent repurposing documents received from outside of the firm into properly styled firm documents by 75%. This resulted in improved end-user productivity,

better document quality, enhanced client service and reduced document risk.

Template maintenance

- **UK firm analyzes templates and saves 500 hours/20,000 pounds.** As part of an upgrade to a new version of Word, a medium-sized UK firm updated its collection of templates. But during this template maintenance, the firm inadvertently introduced errors such as broken numbering into the templates. 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.

PDF readiness

- **Top 25 Canadian firm improved the quality of its PDF files & its reputation.** 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

Microsystems Skills Assessment Module, a component of DocXtools, analyses and assesses individual and batches of documents. Specifically, it assesses a test taker's Microsoft Word skills and automates the time-consuming grading process of the exercise document, allowing the assessment to be easily administered and graded.

- **Baker Hostetler identifies targeted training for new secretaries and reduces the risk of an unqualified secretarial hire.** The firm's HR managers use the Skills Assessment Module to administer a Word test to secretaries being considered for a position at the firm. The use of the Skills Assessment Module helps the firm reduce the risk of hiring an unqualified secretarial candidate. In addition, the firm's trainers use the test results/report that the Skills Assessment Module provides as a detailed training roadmap for each new secretary, maximizing the efficiency the new hire training.
- **Am Law 100 firm reduces bad new hires and delivers 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.

- **Cox Smith provides better, more targeted training plans for teaching staff critical Microsoft Word skills and eliminated course offerings as a result.** The training team at Cox Smith wanted to increase the effectiveness of the firm's Microsoft Word training courses by accurately identifying the legal-specific Word skills that the firm's staff needed to be successful at their jobs. In order to build targeted training and learning plans, Cox Smith adopted the Microsystems Skills Assessment Module to measure 1) the current Word knowledge of its staff and 2) identify the level of Word expertise needed to meet the requirements of the firm and test against these in order to hire the best and most qualified new hire candidates. As a result, the firm increased the efficiency of its training and eliminated unnecessary course offerings.
- **Am Law 50 firm provides targeted training to secretaries and reduces number of documents sent to help desk by 57%.** 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. The Skills Assessment Module 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.
- **Am Law 200 firm targets training by analyzing practice area documents with the Skills Assessment Module.** The Microsystems Skills Assessment Module 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 the Microsystems Skills Assessment Module to analyze those documents to assess adherence to firm best practices. With the result 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 DocXtools

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

Improve your document production performance with DocXtools:

- [Produce higher quality documents](#) – DocXtools and its Word Skills Assessment Module empowers lawyers, paralegals, secretaries, word processors, help desk staff and trainers to produce corruption-free documents that are formatted and styled according to the firm’s document best practices.
- [Streamline document production workflows](#) – DocXtools training and consulting services help your firm streamline document production processes to dramatically boost productivity.
- [Support last-minute document problems](#) – Microsystems DocER and Solutions Center support provides your “safety net” when document and technology issues require help, resolving issues within two hours or less to help you meet critical client deadlines.

About Microsystems

Founded in 1995, Microsystems is a global leader in document lifecycle software and services designed to improve the total document automation and quality control processes of document-intensive businesses. The company helps more than 650 client firms and companies increase document production efficiencies and reduce costs and risk. Microsystems is based near Chicago in Downers Grove, Illinois. For more information, visit www.microsystems.com or call 630.598.1100.