

It has been a decade since legal document production moved from WordPerfect into Microsoft Word. Undoubtedly, the momentum toward the Microsoft 2007 Office System and Word 2007 seems reminiscent to many of us: a file format change bringing 18 new extensions to the desktop, a completely redesigned user interface and a bevy of new legal-centric features. 450 million Office users worldwide are invited to “get ready for a new day,” rethinking everything from the operating system to portals, workflow and document production.

Many of the underlying technologies first introduced in Office 2003 transform document production even more broadly and overtly with Office 2007. This launch of Office established XML as the default file format for every Office application. And SharePoint is now a core Office component, opening up new collaboration questions, and Microsoft might argue new collaboration answers, as well. As such, document collaboration workflows are the most important point around which to begin planning and preparation for early adopter clients.

In legal, getting ready for this new day is no small feat. Law firms are invited to reconsider the entire technology infrastructure upon which they practice law. Even if your firm doesn't plan to migrate to Office 2007 until 2009 or beyond, some of your clients and fellow law firms may be Office 2007 early adopters. How will you collaborate with them and maintain client service levels?

#### Clients — Not Legal — Will Lead Adoption

During *Jumpstarting Your Law Firm's Microsoft Word 2007 Readiness*, a webinar we presented with the ILTA Microsoft Peer Group, we polled attendees for a snapshot of Word 2007 experiences in the legal community. Our poll of more than 300 legal IT professionals showed that 18 percent of firms plan to move to Office 2007 in 2007, including five percent that are migrating to Office 2007 in early 2007.

While these statistics are illuminating, even more interesting are the adoption predictions for Microsoft Office users in general. Forrester Research estimates that between 10 and 15 percent of Microsoft Office implementations — representing millions of users — will begin migrating to Office 2007 in early 2007. Millions of users, many of them law firm clients, could begin using Office 2007 and sending Office XML documents your way in the next few months.

Based on this statistic and what we've been hearing from law firms with whom we work, we sense that clients — many of whom remain on Office 2000 today — will lead Office 2007 adoption ahead of legal. Even if Office 2007 migration isn't on your implementation plan yet, it's imperative that you make collaboration across these new file formats a top priority. As early as November of last year, law

firms began receiving Office XML documents from clients. The Office 2007 consumer launch on January 30 is bound to accelerate adoption further, as many clients — not to mention your own users — are now exposed to its results-oriented approach at home.

#### Optimize Word 2007 Collaboration Workflows

Hard lessons learned from the epic Word 6 and Office 97 binary transitions led Microsoft to make backward compatibility a strategic focus of Office 2007. But choosing the optimal collaboration workflow is still critical to serving clients effectively and avoiding document collaboration issues.

In supporting collaboration with early adopters, it is important to understand what file format options are available in Word 2007. Upon opening a binary .doc file, the seamless Compatibility Mode designed into Word 2007 protects the legacy file from induction of new 2007 functionality — those features not supported in lesser versions of Word. The user then elects to convert the file forward into the new .docx default file format. This ensures a much smoother and determined transition upon document intake and a more trouble-free collaboration with those who remain behind.

Any new document created in Word 2007 will be saved, by default, as the Office XML package of .docx. This file format enables the application to impart any of the 19 new features now available in Word, most notable among them being tracked moves, a new equation editor, SmartArt, Office Charts and relative text boxes and margin tabs. Files of this type can only be opened by Word 2007 or supported versions of Word outfitted with the freely distributed Compatibility Pack.

Consider which of these possible document collaboration workflow options works best for your firm:

**Request fully-compatible Word 97-2003 documents from clients.** Word 2007 users can save documents back to legacy versions, such as Word 97-2003's .doc format using a feature prominently exposed on the Office Button Save As menu.

**Deploy the Microsoft Office Compatibility Pack.** The Compatibility Pack enables law firms using Word 2000, 2002 and 2003 to collaborate on and exchange documents with Word 2007 users. This enables the Open, Save and Save As of all new XML formats in these lesser versions of Word. Although the Compatibility Pack does not fully preserve all the new Word 2007 functionality introduced into the document, it does foster a “same file type” collaboration between parties.

**Develop custom conversion solutions using the OMPM.** The Office Migration Planning Manager (OMPM)



supports automated batch conversion of legacy documents into the new XML file formats. This toolkit can be used to develop *ad hoc* conversion solutions or for purposes of migration discovery and planning. This option is not for the faint-hearted or the resource-restrained!

**Install Office 2007 in your environment.** Access to a 2007 Office System installation within your environment is recommended as a means to both ensure complete client service to early adopters and foster readiness for your staff. This installation can be either hosted in a remote desktop environment or centrally located on a walk-up system within your support center.

We also polled attendees of our webinar on these early-adopter collaboration options and their plans. Two percent planned to use the “Save As” method, 12 percent planned to use the Compatibility Pack, one percent the OMPM and two percent planned to use Office 2007 itself. If your firm has yet to decide on an early adopter collaboration strategy, you are not alone — 72 percent of the respondents to our poll were undecided.

### Plan Ahead for Round-Tripping Document Issues

Conversion from one document format to another often introduces formatting or content issues. And the repeated “round-trip” conversion back and forth so common to legal document collaboration usually compounds the problem.

Even though Word 2007 and the more stable Office XML formats promise to minimize these document issues, careful planning is still required when collaborating on documents with Word 2007 users who explore the latest features.

It is important that you understand the behavior of new functionality your clients may use and anticipate how it may become compromised, for example:

**New comparison functionality.** The improved comparison engine in Word now tracks moves. Should this new functionality travel

back to a lesser version of Word, it will be permanently converted to deletion and insertion pairs when saved.

**Equations.** If a client using Word 2007 introduces complex equations into a .docx file and a lesser version of Word is used to edit the file, saving it as a binary .doc, the editable equation permanently becomes a static picture of the equation.

**Content Controls.** The utilization of new Content Controls, a sort of two-way field code introduced into Word 2007, means that once a lesser version of Word saves the file, your client using Word 2007 sees only the “content” upon its return, not the active “control” they issued to you.

### Start Planning Today

Successful document collaboration with Word 2007 early adopters starts with planning, preparation and discovery. Begin planning today by informally surveying key clients using questions such as “When do you intend to move to Office 2007?” and “What new Word 2007 functionality will you most likely use?” Test your Word 2007 document collaboration workflows and technology thoroughly within your firm’s document production environment before deployment, verifying support with mission-critical third-party applications. Many firms are using test files that apply the new functionality most likely to be popular among clients, such as tracked moves. Finally, plan internal communications that convey your Word 2007 early adopter collaboration strategy firm wide and ensure consistent client service.

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