

Lessons Learned in Deploying Office 2007



While the Office 2007 system brings increased productivity, accelerated user acceptance and a stable, secure and agile environment, many firms don't know where to begin when planning for deployment. In an industry where Office applications — particularly Microsoft Word — are mission-critical, it is essential that your users and your firm realize the benefits of productivity and stability through utilization of informed design, definition and planning.

Based on my experiences working with firms in varying stages of implementation, I can offer some guidelines to ensure user acceptance, accelerated adoption and the ability to recognize effective new workflows. What follows are real-world lessons learned from early adopter firms of various sizes and an invitation to construct the document platform for the next decade.

ADOPTION INSIDE LEGAL

The entire firm-client relationship is defined by the documents kept. When considering the stages of client engagement, document workflow connects and records each and every phase. Unlike previous Office implementations, client engagements — and our documents — herald a new economy and reach far beyond any one ZIP Code or national border. Now, more than ever before, firms compete globally and must approach document platforms and associated tools with an extended, or should we say, extensible, reach.

Fortunately, Office 2007 comes with attributes to meet this approach: a fluent interface (otherwise known as the “ribbon”), an open file format — XML — and seamless connectivity with applications and internal and external networks. Not only does the ribbon interface make it easier for users to find the tools they need, it provides an environment that can be leveraged to further enable document workflows, improved document processes and, best of all, an improved user experience.

At the core of Office 2007 is XML. From the document file formats to the ribbon, Microsoft has committed to an open and extensible standard. This means the manipulation of documents or launch of automated workflows can occur without the Office application itself. Imagine creating an entire family of documents that support the intake of a new client — engagement letters, associated waiver letters — without ever launching Word. Unleashing this digital document workflow is made possible by the Office 2007 system and third-party software applications that fully leverage it. The result? Legal finally sheds its \$2,500 typewriter, unleashing digital document workflows previously impossible.

With the radical redesign of the Office 2007 fluent interface, many firms worry about the impact to their users. As you will learn from your early adopter peers, this fluent interface creates an improved, more intuitive user experience than Office deployments of the past. Two to four weeks into the learning curve, document producers report being more productive than before the upgrade.

ADOPTION STRATEGIES AND LESSONS LEARNED

Through our experiences guiding and supporting clients in their Office 2007 implementations, we've learned some lessons and discovered how early adopter firms have leveraged their adoption techniques. This has led us to the development of a five-stage rollout strategy.

STAGE1: DOCUMENT EXCHANGE AND COLLABORATION

By now, every firm should be fully armed to meet the requirements of the document exchange and collaboration stage. Firms currently using a previous version of Office should have looked at, evaluated, tested and deployed Microsoft's Compatibility Pack.

Freely downloadable from Microsoft, the Compatibility Pack is a collection of file open and file save filters for Word, PowerPoint and Excel. It allows Office 2000, XP and 2003 applications to open the "x-files" created in Office 2007, where they can be edited, printed or saved — all while maintaining visual fidelity, file format fidelity and the file name. (Note: When integrated with a document management system, some limitations may exist. Check with your DMS vendor for current capabilities.)

The document exchange and collaboration stage creates the on-ramp for power users to embark on the other four stages of deployment. This is an exceptional way to get your users to understand the capabilities and enhancements of 2007, the limitations of the Compatibility Pack and where and how third-party tools are needed.

LESSON LEARNED: SAN DIEGO-BASED FIRM, 28 OFFICES

This firm's current environment is Office 2003. The firm receives Office 2007 documents from its early adopter clients, and it identified early on that first on its to-do list was to build and prepare an Office 2007 project team. The team would be charged with getting reacquainted with Word's native functionality, and to focus on the new features of Word 2007 that may impact decisions on add-ins from third-parties. Recognizing Microsoft had fully "tricked-out" Word 2003, the team wanted to determine the professional-level tools they would or wouldn't need when rolling out 2007. Additionally, it needed to become familiar with the functionality of the new Office system, given clients' adoption and the likelihood these features were being used in documents the firm received.

The project team jumpstarted its efforts with a one-day session, first to learn the new features and functionality. This evaluation helped the team recognize where third-party tools were needed to enhance the 2007 document production environment, and where document exchange and collaboration issues might occur.

After this meeting, Microsystems worked with the team to form specific plans for its document exchange and collaboration phase, most likely lasting 12 months. We presented a deep-dive session on considerations of the variances associated with document exchange, and the impact on collaboration between a firm on 2007 and one on 2003. Utilizing a Chicago-based classroom, and broadcasting to six of the firm's offices, we worked through pre-built documents that reflected a typical collaboration trail. This allowed the team to develop best practices around managing the workflow between now and the time the firm deploys.

STAGE 1: DOCUMENT EXCHANGE AND COLLABORATION — RECOMMENDED TASKS

- **Download Compatibility Pack**
- **Verify prerequisites**
- **Verify third-party support**
- **Test, then deploy Compatibility Pack**
- **Identify document experts**
- **Create 2007 playground**
- **Investigate all new features**
- **A pre-built document test collection**
- **Try on third party solutions in Office 2007**
- **Find the feature gaps**
- **Identify lead subject matter experts**
- **Inventory current desktop**
- **Jumpstart user training**
- **Solicit user requirements**
- **Network with peer firms**
- **Work in "compatibility mode"**
- **Identify strategies, goals**

STAGE 2: PLANNING

During the planning stage, the spotlight should be deeply focused on the user community. Why? In the decade since desktop technologies were last refined, roles of support staff, lawyers and the business climate they serve have seen significant shifts. As such, the automation that law firm IT departments provide may not adequately address the work requirements they have today, nor those anticipated in the decade ahead.

One way to begin would be to inventory the current state of your firm's document production environment by gathering a list of user requirements. Several research methods can be employed here. Consider surveying the users about their needs, annoyances and the holes that exist within the current environment. A focus group may be an efficient method of collecting user requirements. Also, consider face-to-face interviews that involve live environment walk-throughs. This research helps you establish goals and tenets for software selection, document design, interface design and deployment strategy.

Software selection: The goal is to rethink your entire document automation applications and processes. While the "desktop" has been a PC for two decades, it may be virtual or Web-based in the future. How does that influence decision and definition processes? Take this opportunity to define a process and criteria for selection of third-party automation vendors. Consider vendors that are professionally aligned with Microsoft, ones that help maximize your Microsoft investment. Determine if current vendors are investing in the technology that ensures they will be able to offer support for the next decade.

Document design: Another part of the planning stage is to update or rebuild templates. This step is an opportunity often underappreciated or overlooked altogether. Revisit some of the design choices made in the past such as how do you define your styles, numbering and branding, or how do you automate and maintain commonly reused content? Such considerations will help you realize a much more agile environment in the years ahead.

Interface design: Because the Office 2007 interface has changed significantly, the initial reaction of knowledgeable support staff may be one of apprehension. Ironically, the interface change is your best advocate for adoption and user acceptance: spend time planning what your interface is going to be. Define what tabs and functionality your ribbon(s) will incorporate, and involve the users early on. These decisions and this communication will ensure users are aligned and will reveal requirements often overlooked.

It is also very important to enlist and engage individuals and groups within your organization such

as human resources and marketing. These groups can help communicate the objectives of the rollout. The better you deploy the communication, the better you'll deploy the application.

LESSON LEARNED: TROUTMAN SANDERS LLP, 11 OFFICES

Troutman Sanders LLP is considering an Office 2007 migration in 2009 to provide the best tools and practices to efficiently produce documents.

STAGE 2: PLANNING — RECOMMENDED TASKS

- **Inventory current state**
- **Build, deploy "playground"**
- **Download MSFT learning**
- **Establish goals and tenets**
 - Software selection
 - Document design
 - Interface design
 - Deployment strategies
- **Interview vendors**
- **Define RFI process, issue RFI**
- **Gather user requirements**
 - Formal process?
 - Resources for process?
 - Organizational changes?
- **Identify lead business users**
- **Isolate drivers, justifications**
 - Alignment to other projects?
 - Sequencing to other projects?
- **Enlist HR, marketing, practices**
- **Institute educational initiatives**
 - Skills Assessment?
 - Refresh training?
 - Automation review?
- **Audit all templates, forms**
 - Automation?
 - Menus/customizations?
 - AutoText?
 - Styles?

STAGE 3: PILOT

An effective strategy among early adopter firms is to conduct multiple pilots — for IT and for the end-user. Pilots should be quick and focused on one aspect of the deployment. IT pilots will vet stability, integration aspects and continuity between applications and should test for challenges. User pilots should be conducted in a similar manner; except that lawyers and assistants should run through common workflows to identify gaps.

A key to pilot success is to communicate the scope and expectation of the pilot and establish an open understanding with the testers. It is important for the tester to know that not everything will be perfect, but that you are looking for very open, meaningful and specific feedback.

During your pilot process, just as when you deploy, you will need to fold in hotfixes and acquire updates (to the operating system and/or the Office edition itself). Plan for these so that you identify, in advance, what the communication mechanism is to fold these in. Do not wait until the end of the pilot to do this.

Another key is to identify staffing of quality control (QC) processes. Determine if there will be focused resources for QC or if the QC persons will be embedded within each of the user pilot groups. Determine if you will include internal resources for the QC process, or if it will be outsourced. Given this key aspect of the project, adequately anticipate requirements for design and integration documentation.

LESSON LEARNED: CHICAGO-BASED FIRM, 20 OFFICES

This firm is planning to have its Office 2007 rollout complete by Q3 of 2009 and is currently working in Office XP. It wanted to accelerate deployment of Office 2007 in an effort to improve the stability of its documents and of its users' desktops.

The firm created a Citrix playground to survey the users. As the users left the playground, feedback was provided right then and there. The immediate feedback was extremely beneficial and provided good insight, which the firm then rolled into its test plans and communications.

The firm mapped out the project by role and assigned tasks to specific team members and also assigned an administrative assistant to the project for the preparation and scheduling of meetings. This was very helpful, as it freed up IT time for very focused and efficient work.

In preparation for its rollout, this firm removed all VBA-based programs from the desktop; it wanted to tackle all of the things it could before fully migrating to 2007. The firm also ultimately converted an important set of its Office XP toolbars into Word 2007 ribbons, which facilitated practice area workflows.

STAGE 3: PILOT — RECOMMENDED TASKS

- **Plan more than one**
 - IT pilots (with goals)
 - User pilots (with goals)
- **Leverage SharePoint**
- **Identify diverse group**
- **Create an agreement**
 - What users should expect?
 - Communicate goals
 - Provide jumpstart info, time
- **Identify deployment approach**

- **Acquire hotfixes, updates**

- **Quality control**

- External resources
- Internal resources
- Current state

STAGE 4: ROLLOUT

As you approach this stage, it is critical to communicate the goals and expectations to the firm's leadership, practice area heads and support areas. Also important is to enlist human resources to partner in managing the change and transition for your users, freeing up IT to focus on those able to keep pace with the rollout and its learning events.

Do not dismantle your project team once this stage is completed; rather, let this team remain intact to function as an early warning system for potential issues and to further evangelize the Office 2007 implementation. Additionally, this team can effectively market and gather requirements for a second phase of training. This gives users peace of mind that they have an added opportunity to solidify understanding of new or advanced functionality.

LESSON LEARNED: CLIFFORD CHANCE LLP, 28 OFFICES

Clifford Chance LLP began its deployment to Office 2007 in Q4 of 2008. The firm had a number of goals and drivers, but primarily wanted to create a truly unified global desktop. Not only did it want to improve its document production workflows, but wanted to lower its maintenance costs as well. With the adoption of Office 2007 and additional software — DocXtools and D3, which leverage XML and seamlessly integrate with Word 2007 — the firm created a cohesive, global document production environment. As a result, Clifford Chance LLP simplified the development and its use of templates, minimized the number of third-party applications, reduced its IT maintenance and support costs and provides its users with a better solution for styling, comparison and overall document creation.

"Our deployment of a global desktop is a huge achievement for us. It has empowered our users to quickly produce document first drafts with accurate, firm-approved content, resulting in greater productivity, enhanced profitability and improved client service," said Robert Webb, of Clifford Chance LLP.

STAGE 4: ROLLOUT — RECOMMENDED TASKS

- **Expectation setting at all levels:**
 - Firm leadership
 - Practice heads
 - Support areas
- **Professionally trained staffing**
 - Strong empathy
 - Problem solvers
- **Enlist HR (for resistant users)**

- **Can marketing help?**
- **Well-planned design will evolve**
 - UI-enabler on the team
 - Do not dismantle focus groups
- **Enroll your vendors (they are team members)**
 - Know their requirements
 - Drive them
- **Guard gates and intersections**
 - Third-party integration points
 - Physical office migration stages
 - Client collaborations
- **Monitor capture systems**
- **Flexible training schedule**
 - Well-timed familiarization
 - “There will be a phase II”
- **Tee up for phase II**

STAGE 5: POST ROLLOUT

After Office 2007 is deployed firmwide, consider and plan for the unveiling of the rest of Office, including applications such as OneNote, Visio, Communicator, Groove or SharePoint. Also consider the server side extensions of Office for Excel and Project. These

extensions enhance productivity and foster an even better user experience.

It is also important to keep the marketing department engaged at this stage. This communication vehicle continuously provides users with helpful tips, tricks and success stories. This group can also help publicize available learning materials to lead users into Phase II training.

LESSON LEARNED: CANADIAN FIRM, TWO OFFICES

This Canadian firm completed its migration from WordPerfect 8 to Office 2007 in Q3 2008. A firmwide initiative to improve and align technology drove its Office 2007 deployment and adoption. Microsystems helped by converting all of the firm’s WordPerfect documents into the Open Office XML (.docx) file format, which the firm adopted as its default.

The firm has enjoyed greater agility in the creation of automated document workflows. In anticipation of clients or collaborators who might not yet be on Office 2007, lawyers incorporated a link to the Compatibility Pack into their signatures in Outlook. When the lawyer was uncertain about the collaborator’s access to the Compatibility Pack, they published to PDF. The firm has enjoyed greater agility in the creation of

Document Generation Using Word 2007 OPENXML

by Marcel van Kampen of Bell Gully

New Zealand law firm Bell Gully was seeking a more efficient way to process loan applications and supply conveyancing services to lenders. Document generation, which involves document creation and content automation, presented a sure fire way to improve business efficiency. In this article, developer Marcel van Kampen looks at Bell Gully’s experience developing and implementing an MS Word based document generator (DG) that was recently ported to a server side DG that processes OPENXML Docx files.

Document Generation in Action

Document creation can range from producing one document from a single precedent to the complex creation of multiple documents. DG requires the marking up of the precedents that are used to create the documents. They have a user interface in which the precedents are opened, marked up and saved in Word format, a proprietary format or an intermediate format like xml or rtf.

The second step of preparing precedents for automation is capturing the business rules for the document generation and content automation. Generation and automation logic is captured in formulae or expressions, *e.g.*, Insert FixedTerm.docx if AccountType=FixedOnly, Add Guarantee.docx to bundle if Borrower=Company, remove CarParkClause if JobTitle#Partner.

The host application can be the DG itself, MS Word or a third party/in-house application that interfaces with the DG. The DG can extract its input from a database or prompt the user for the data. The user inputs can be captured for re-use to regenerate the same document or produce others.

Developing a Server Side Document Generator

My first experience with DG was an in-house development for Bell Gully in 1998, producing a Word-based generator called Lex Machina. It resided in a global template written in WordBasic and was later ported to VBA. Over the years, Lex

automated document workflows. Users enjoy a much improved and more productive experience.

STAGE 5: POST ROLLOUT — RECOMMENDED TASKS

- **Expect positive changes**
- **Continue focus groups**
 - Solicit feedback
 - Answer questions
 - Capture additional automation requests
- **Engage marketing to facilitate communication**
 - User stories
 - Continuous tips, tricks
 - Available learning materials
- **Engage phase II training**
- **Seek further opportunities**
 - Extend automation
 - Ease collaboration
 - Refine best practices

• Plan for the rest of Office

- OneNote
- Visio
- Communicator
- Groove
- SharePoint

CONCLUSION:

A successful Office 2007 migration is dependent on a firm's approach to planning and managing around the opportunities for change. Early adopter firms have already experienced improvements that unleash digital document workflows at a pace previously unattainable. In this global economy, such capability ensures the ability to meet the needs of a diverse and expanding client base. **ILTA**

Machina has generated documents from requests originating from Word dialog boxes, MS Access databases, VB6 and .NET applications and Web applications.

When Office 2007 was released with its OPENXML Docx file format, it became apparent that this could be used to build a server side document generator in the shape of a .NET application that produces Docx documents without using Word itself and without Word even being installed on the server.

Microsoft has given OPENXML its full support. There are excellent publications on the Web supported by blogs from the MS product developers themselves, and you can even find useful training videos.

The OPENXML standard itself covers thousands of pages, but you can read OPENXML by Wouter van Vugt instead.

Available on the Internet, it describes the Docx file format which is in fact a zip file containing multiple directories each with multiple xml files. Starting on a new file format and new standard can be daunting, but with van Vugt's help, you'll be speaking fluent OPENXML in a couple of days.

You can extract the Document.XML from the Docx file and start editing Word documents with XMLNotepad within hours. Document.XML is the xml component in the Docx zip file that contains the body of the Word document. .NET applications

can use an assembly to open a .Docx file and access, delete, modify and add xml components. It took about a week to rewrite the core of the Lex Machina document creation features in a .NET application that reads and writes Docx files.

The Word 2007 content controls (under the Developer tab of the ribbon, revealed by selecting a Word option) are excellent for marking up Docx files for content automation.

The Project Timeline

It took a Word developer, a .NET developer and Web developer three months to develop the server side document generator using the experiences obtained from developing and using Lex Machina. The extra challenge was developing the environment for the document generator to operate in. This involved writing a Web service to receive requests, a queue handler to process them and additional services to evaluate the business rules, invoke the document generator and deliver the produced documents via the Web, by e-mail or in Word.

The end product has presented the opportunity to provide document generation outsourcing services to external parties which include marking up the clients' documents and capturing their business rules. Truly a win-win project. **ILTA**