

# Practice Tips

## Putting document assembly software to work for your firm

By Richard D. West

Document assembly software looms big in the future of Florida family law practice. I have been using document assembly programs in my practice for about four years and it has revolutionized the way I practice.

My paralegal, Terri duRhone, has been with me for almost eight years and she would never want to go back to the old fashioned way we used to generate documents.

Terri got me started with a document generation program. She came to my practice in 1994 from a firm that had developed an information-merge system to expedite the generation of documents. She figured out how to access the data in my case management program to make it available to merge into word processor documents. We built upon that system and reached the limits of what we were able to do. I've not been totally satisfied with our system so we have tried some of the commercially available software to "program" our own forms. We were never able to get the results we expected for the work that we put into developing our forms, so we have stayed, until recently, with our own little "home-grown" system.

We have finally found a document assembly program that meets our needs. It is fast, easy to learn and use, extremely comprehensive, and very affordable. I believe I have found the future of document assembly for Florida law practitioners.

I am a big proponent of integrating technology into the practice of law, and I'm often asked about document assembly and I am always ready to share my opinion.

The most common question is "What are the benefits of document assembly?" While I'm a little embarrassed to admit it, I love the people aspect of my practice but I hate the paperwork. Generating documents is tedious, mundane, and boring. If I never had to write another pleading for the rest of my life, I would be happy. But, even though Terri generates most of my documents, there are times when I'm trapped and I have to do them myself. My document assembly software allows me to get it over with quickly, so it allows me to spend more of my time with people and less time generating paper.

Document assembly software has helped me become a better lawyer in a rather surprising way. I learned a long time ago that the smartest tactic in a dissolution case is to work it backward. What I mean by that is that I start by drafting the final decree in which I lay out the final outcome that my client desires and create the framework to guide my entire case.

I realized while clerking in law school that clients don't hire me to file petitions, to file discovery, or even to represent them in court.

They hire me because I have a reputation for getting results for my clients that are consistent with the results they want. Working backward helps me achieve that objective because it keeps me focused on the outcome, not the process. The ultimate benefit of this method is that I enjoy a successful practice based on referral-directed clients.

A benefit that is difficult to quantify is the accuracy that document assembly brings to the process of generating legal documents. By using a standardized data source, document assembly means no more spelling errors, as long as we enter the name and other data correctly the first time. It also means that I don't have to worry about including all the correct statutory language; the software takes care of that automatically.

Finally, my document assembly software allows me to get much more productivity from my staff. A relatively inexperienced support staff person can typically do at least 90 percent of a task without my supervision. I can ask Terri, my very experienced paralegal, to do seven or eight petitions and she can do all of them in an afternoon without any supervision.

Sometimes fellow practitioners mention two concerns about document assembly programs: 1) a drop in income if it is really that efficient to generate documents, and 2) document assembly stifles creativity. I answer both objections with one thought. My clients are paying me for results, not for the paperwork. The better results, the happier they are and the more clients referred to me in the future. Document assembly allows me to take my mind off the tedium that goes into generating 90-95 percent of a pleading, for instance. That frees me to spend more time thinking about creative ways to address that pleading instead of spending time generating the entire document.

For example, ordinarily I might spend two hours working on a pleading. Now I can spend approximately 15 minutes generating the basic document with my software. That leaves me with over an hour and a half of time to spend thinking about the case instead of just reacting.

I am very satisfied with document assembly, and I'm surprised that more practitioners haven't jumped aboard. There are really no significant downsides that I can see and the upside potential is huge. Based on my experiences, I have a few suggestions for other practitioners who are ready to introduce document assembly software:

• **Forget about shopping for the lowest price.** Document assembly means many things to different people. A \$49 forms-on-a-disk program is not true document assembly. It may save you a little time but nothing like true document assembly, which does much more than

simply provide the boiler plate. You generally get what you pay for in document assembly.

• **Remember that support staff needs to buy-in.** They are already busy and stressed. Adding a new software program, no matter how good, results in time lost while learning a new system — time they do not have. Be supportive and sympathetic but insistent that they learn the new system. The long-term success of your practice depends on it.

• **Ask about the training.** Training, especially if it is done in-house, greatly eases the transition by your support staff. There is something very reassuring about having someone lead you through learning a new task rather than having to spend the time learning it by yourself.

• **Be sure it is comprehensive.** You can buy small programs to fulfill many different needs. Every one of them requires a learning curve, time, and money to keep current. Look for a document assembly system that incorporates as many different areas of law as possible and performs as many different functions as are relevant to you.

• **Make sure the software is flexible.** Some of the document assembly programs available today are based upon macros, which in turn, are dependent on a particular word processor and version of that word processor. You are in a bind if you have multiple word processor versions in your practice or if you decide to upgrade your word processor.

• **Learn the system yourself.** You may not commonly generate your own documents but there are times that there is no alternative. Already knowing the system means that you can get this unpleasant task over in a few minutes instead of hours.

• **Make sure the system is easy to learn.** There are some very complicated systems available that require intense training to master. If the staff person trained on it leaves, you're dead in the water.

• **Look on a good document assembly system as an investment, not an expense.** It is an investment in greater productivity, more professional documents, more time to better serve your clients, and better morale for your support staff.

• **Finally, reverse your thinking about your cases.** Use document assembly to start at the end of the case — draft your final decrees up front to help guide your case. You will be a better lawyer for it.

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