



## Document Assembly and Automation – Why bother?

Document assembly (also often referred to as document automation) is the business of creating documents from pre-written content.

Most law firms have at least rudimentary document assembly even if that only involves starting a new document from a company master on a shared drive somewhere.

But there's a thing about document assembly, the more sophisticated you go, the longer it takes to set it up.

So there is a definite tradeoff between time taken to set up and the rewards thus reaped. So what are those potential rewards?

- Time saving – It takes less time.
- Reduced error – Errors are minimized.
- More Scalable – More documents can be created
- De-skills – Requires less skilled, hence less costly staff

All in all then the benefits are substantial, but that still doesn't mean every law firm can reap these benefits. That can come down to the type of law being practiced.

## The Essential concepts of Document Assembly

All document assembly systems will at least support the following key concepts:

### Placeholders

Most people have used the mail merge feature in Word. Typically, names and addresses are extracted from a database and placed in the appropriate point in a Word document. The result is a set of letters each individually addressed. The appropriate point where the data is to be placed (or written) is defined by a placeholder. The placeholder is often signified by brackets with the name of the Excel or database column within, eg {{FirstName}}. Placeholders are used extensively in document assembly. In all cases the placeholder will be replaced by the appropriate content.

Placeholders can be replaced by single pieces of text such as a name, or entire blocks of text, known as snippets or even derived values, such as the calculated value of payment in a fee agreement.

### **Conditional Statements**

There are a great many occasions when assembling a document where conditional statements apply. If male then his, him, he, else hers, her or she. If plural then theirs, them or they, if Dear Sir then Yours faithfully and so on.

As well as grammar, conditional statements can dictate the choice of sections of a document. If Texan then clause 1, if Californian then clause 2.

### **Snippets**

Snippets are blocks of text from which documents are assembled. Clauses and stipulations are obvious examples, but standard paragraphs and even full contact details are equally common for inclusion as snippets.

Snippets will often be formatted, and may themselves contain placeholders and conditional statements.

## **Is it right for your firm?**

If the branch of law practiced by your firm is characterized by a large amount of repetition, with not much deviation from matter to matter then your firm is a good candidate to benefit from document assembly.

Conversely if there is little repetition from matter to matter then the likelihood of reaping the benefits drops significantly. That's not to say they are lost altogether of course, most law firms, no matter how eclectic the case load, have standard elements such as engagement letters.

## **Making it happen on a Mac**

So you are convinced of the benefits, and the law you practice is a great candidate for introducing document assembly, but wait, you use Macs! Dream over?

Well it is true to say that the vast majority of products and tools in document assembly are Windows based. There are some that are browser based, so are technically cross platform, but when it comes to document assembly products developed specifically for a Mac there are precious few.

This is for a number of reasons; many developers regard the Mac market for lawyers as being niche and small, it is also true to say that hooks into the main tools of document assembly (in particular Microsoft Word) are limited on a Mac and are chiefly based around automation using Applescript.

Over the past 4 years we at CHL Software have invested heavily in providing Mac based lawyers with a native Mac tool set, and it is all based around our core product DocMoto.

## **How far can you go ... on a Mac**

Today DocMoto can cover most of the common (and some not so common) document assembly requirements for Mac based law firms.

Simple to highly complex automations can be created, with sophisticated conditional statements embedded into Word document templates.

Snippets can be drawn in from a snippet library and documents can even be personalized.