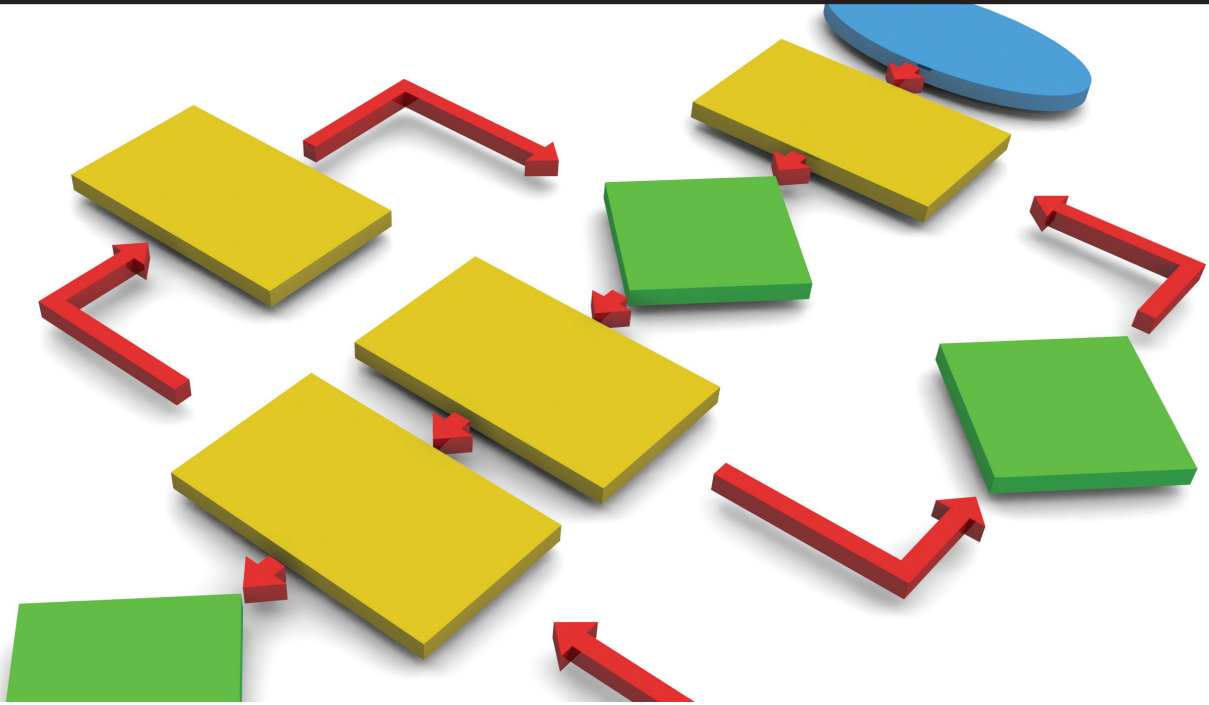


Tech tools for improving In-house legal operations

By Paul Saunders



In-house legal departments can benefit greatly from process improvement to enhance quality, reduce costs and increase speed and agility. Much can be accomplished by retaining experts using an approach like Lean Six Sigma who can work with your team to develop solutions to the unique problems they face (the most pressing of which is often getting more done with less time). The focus in such projects is often on eliminating wasteful activities and focusing on what the customer of the process truly values. However, ideas developed in these improvement initiatives can be challenging to implement as they often depend on selecting the proper technology tools to digitize and automate the new streamlined process. With so many software options available, it can be extremely difficult to find tools that work well in a legal environment and that will be embraced by busy legal professionals. In this article, we'll discuss two powerful and cost effective applications that can greatly assist in-house legal departments in streamlining their internal processes.

ProcedureFlow

One of the methods often used in process improvement is the creation of both current and future process maps. While the current state map sets out how the work is done today, the future state map outlines how an improved process might operate in the coming weeks or months. These maps can be created using whiteboards and sticky notes, or with software like Microsoft Visio or Excel. Regardless of the tools used, there is almost always a need to share the resulting maps with a larger group to solicit input, manage the process and train users. Sticky notes on whiteboards are great in the initial stages for spotting issues and brainstorming, but they

can't easily be packaged up and distributed to others. While MS Visio and Excel documents are slightly better for sharing the processes with others, version control and the collection of feedback is a real challenge with multiple copies floating around and no easy way to propose changes. Given the shortcomings of these standard tools, users of the new process are less likely to use them and will often fall back into the old ways of doing things.

One application that is helping in-house legal departments and law firms address this challenge is called ProcedureFlow. ProcedureFlow enables teams to digitize their standard procedures through simple drag and drop functionality in a user

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interface built specifically for mapping processes. Users navigate the new process by clicking through a series of small hyperlinked flowcharts called 'flows'. In addition to providing clear visual instructions on what is required at each step of the process, the flows can also include links to tools such as custom apps, databases, websites, checklists and precedents. This results in a shared central location that provides everything a team member needs to get their work done efficiently. The tool also enables users to easily propose changes to the current process, which are then automatically directed to a process owner who can approve or reject the changes. Once approved, users are notified with a visual side by side comparison. ProcedureFlow helps organizations develop a culture of continuous improvement, where all employees are actively engaged in collectively getting better at what they do.

TheFormTool

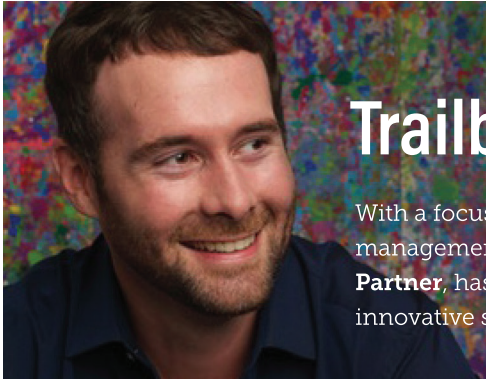
Another common focus area for legal process improvement initiatives is

streamlining the generation of standard form documents. Many in-house legal departments still rely on manual methods for most of their document creation. Documents are often drafted based on the most accessible and not necessarily the most appropriate template. Adding, removing and modifying documents from previous drafts can result in inconsistent wording and formatting. Drafts can also be full of incorrect cross-references, typos, missing language and other defects which often requires significant rework. These issues inject a vast amount of uncertainty and risk into the document drafting process, which increases time and costs.

The use of TheFormTool Pro or Doxsera document assembly software can address many of these concerns. While there are other document assembly applications on the market, TheFormTool strikes an excellent balance between its ease of use and powerful features. Rather than training users on an entirely new interface, the software simply adds a


new ribbon within MS Word, where form authors can easily insert fields, lists and conditional text throughout. Form users simply navigate to the bottom of a standard MS Word document, complete a questionnaire, click a button and entire sets of error-free and highly customized documents can be generated in minutes. Doxsera is TheFormTool's more advanced software option as it enables the creation of entire suites of related documents. Further, Doxsera DB has the capability to link to external data sources such as MS Excel or SQL databases for even greater efficiencies.

The most powerful capabilities emerge, however, when both ProcedureFlow and TheFormTool are used together. For example, users of a new and streamlined contract process could simply navigate to the appropriate step in the flow, complete TheFormTool questionnaire linked to that step and within minutes automatically generate all required documents. All this without spending any time hunting for instructions or templates. Answers from the questionnaire can then be saved and used at a later stage in the process without having to re-type any of the details. When used in conjunction with a new and improved process, these simple yet powerful technology tools enable in-house legal departments to simultaneously increase quality while reducing time and cost. And that translates into less waste, happier customers and better results.



Trailblazer

With a focus on process improvement and project management, **Paul Saunders**, our **Practice Innovation Partner**, has inspired our firm to think more like an innovative startup than an established law firm.



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