

Microsoft Word in law firms

Are client relationships compromised by inadequate investment in Word?

A survey of fee earners and IT staff in the legal industry and their views on the importance of Word to their working lives.

Foreword

We commissioned The Lawyer to look at law firms' attitude to Microsoft Word and users' experience of working with it.

Word can seem rather unglamorous alongside AI or an all-encompassing practice management package so it may not attract the management focus of other technology issues. In our experience we see a varying commitment to Word from law firms, independent of their size.

The research shows that Microsoft Word is seen as a fundamental tool for fee earners. Despite this a substantial proportion of fee earners and IT staff feel that their firm does not get enough out of Word or that they do not invest enough in Word.

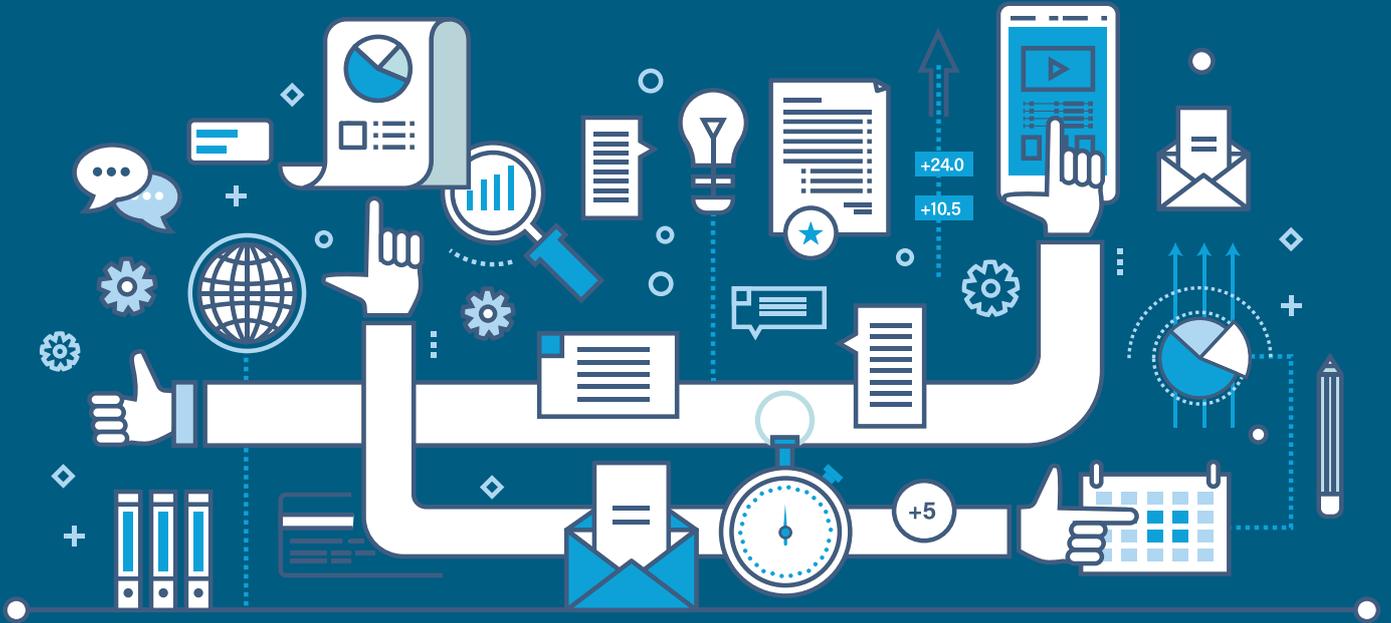
There is a similar story around irregular delivery of training because it is often assumed that new recruits already know how to use Word.

Lawyers spend a material part of their day working on documents that are ultimately the only tangible record of their service. The report shows that the respondents believe that helping fee earners to produce documents faster, more accurately and in the correct house style will be valued by clients and deliver time savings.

If you would like to discuss how you use Microsoft Word in your organisation please get in touch.

Nikki Pike
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99%

FEE EARNERS SAY WORD
IS A CRITICAL TOOL

The challenge

A worrying Word proficiency gap exists at law firms. While some law firms are trying to solve this problem through training and investing in tools, a greater proportion are standing idle, either unaware of the problem or lacking the desire to address it.

Fee earners who struggle with basic formatting tasks are more likely to produce documents of a lower quality and take longer to do so, therefore increasing the time it takes to respond to a client.

With clients scrutinising their legal spend more stringently than ever, firms that can demonstrate the most efficient work processes will undoubtedly be favoured by clients.

Word proficiency gaps are jeopardising client relationships

Whether it is drafting a contract from scratch, updating a document to house style or proof reading an affidavit, Microsoft Word is ubiquitous in the legal profession. Yet our extensive survey of over 150 fee earners, secretaries and IT support staff reveals that a surprisingly large proportion of fee earners don't understand some of Word's most basic functions.

99%

FEE EARNERS SAY WORD IS A CRITICAL TOOL BUT...



1/3 SAY THEY DON'T GET THE MOST OUT OF WORD

The main issues for users

Some 30 per cent of survey respondents stated that they frequently find applying numbering challenging. Meanwhile 29 per cent frequently find it challenging to ensure indentations are consistently aligned, 28 per cent frequently find collaborating with others on a document challenging and almost 25 per cent frequently find it challenging to update a document to house style.

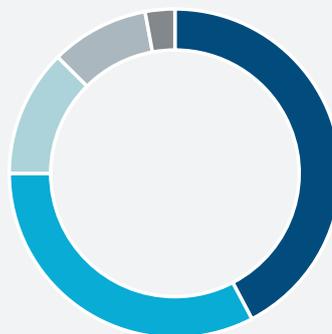
Accordingly, a third of fee earners do not believe they get the most out of Word. Although this is a minority, the proportion that frequently encounter difficulties is still surprisingly large given how vital Word is for lawyers - 99 per cent of surveyed fee earners stated that Word is a critical tool for their work.

Why is this a problem? Besides being frustrating for fee earners and burdensome for assistants, let alone IT support staff, it results in documents taking longer to produce, extending the time it takes to respond to clients' demands. Some 42 per cent of fee earners believe this is the most important consequence of a lack of Word proficiency, while 31 per cent said it causes frustration and 12 per cent said it lowers document quality.

42%

FEE EARNERS SAY LACK OF WORD SKILLS DELAYS RESPONSE TO CLIENTS

Fee earners: What are the most important consequences of not being able to execute the above Word tasks yourself?



- It results in documents taking longer to produce
- It's frustrating
- It results in lower document quality
- It increases costs to the firm (because more support staff are required)
- It means our documents sometimes don't have the necessary compliance terms included

“CLIENTS ARE LOOKING FOR EFFICIENCY”

DAVID LEE, BOND DICKINSON

“A LOT OF FIRMS ARE LOOKING AT IMPROVING THE GENERAL PRESENTATION OF THEIR DOCUMENTS”

RONNIE MYERS, BURGESS SALMON

Indeed unnecessary delays completing client work can cause irreparable damage to long-term relationships. Recent research by The Lawyer identified that law firms’ ‘responsiveness’ is the most important attribute to in-house lawyers when selecting external counsel.¹

“Most importantly clients are looking for efficiency,” explains David Lee, IT Director at Bond Dickinson. “If you have a lawyer typing their own documents and taking longer than necessary due to an insufficient understanding of the Word environment, it will naturally take longer to produce and therefore delay the time it takes to respond to the client. This can be unhelpful and isn’t best use of the lawyer’s time.”

The importance of document layout

Responsiveness aside, a lack of Word proficiency can lead to errors in consistency, formatting and styling. Many firms are putting greater emphasis on how their documents look in response to client demands.

“A lot of law firms are looking at improving the general presentation of their documents and in particular reports,” says Ronnie Myers, an associate in the private client team at Burgess Salmon. “For most lawyers there is probably scope to make better use of diagrams, colour and layout to create reports which are more accessible and visually appealing to clients.”

¹[Standing out from the crowd - What businesses value most from their law firms](#)
Thomson Reuters

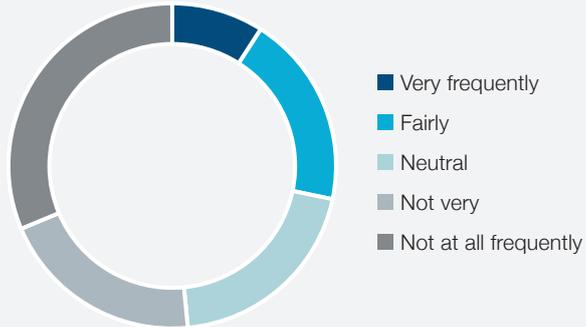
Collaboration is an issue

A lack of understanding of Word also makes it harder for fee earners to collaborate on documents. While only 28 per cent of fee earners stated that they frequently find document collaboration difficult, a significantly higher proportion (67 per cent) of IT support staff said that fee earners frequently have difficulties when collaborating on documents. This indicates that many fee earners who believe they are successfully collaborating with their colleagues in Word are not actually doing so in the most efficient way.

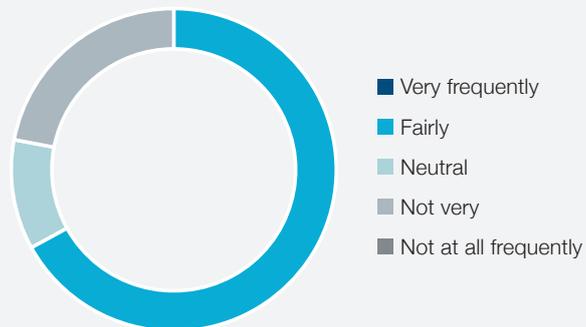


2/3 OF IT SUPPORT STAFF SAID THAT FEE EARNERS FREQUENTLY HAVE DIFFICULTIES WHEN COLLABORATING ON DOCUMENTS

Fee earners: How frequently do you have difficulty collaborating with others on a document?



IT staff: How frequently do staff have difficulty collaborating with others on a document?



“PROBLEMS ARISE AS SOON AS YOU INTERACT WITH ANYBODY ELSE”

FRANK FLANAGAN, MASON HAYES & CURRAN

Frank Flanagan, a partner at Mason Hayes & Curran, explains the difficulties of collaborating on Word. *“Problems arise as soon as you interact with anybody else,”* he says. *“If I’m dealing with affidavits that are being settled by counsel or working on documents that are being exchanged with other law firms, all of the numbering functionality seems to fall away.”*

“I will create a document with fields that should not be manually updated but other users will enter text and not actually stick to the structure that has been set up to make it automated and clean. I’ve even had documents where auto-numbering has been turned off by people and they have manually updated them. I’ve got to the point where I have abandoned using quite a lot of the functionality because it’s not going to be consistently used in the document by others.”

Competing house styles

A key challenge facing lawyers in the document collaboration process is dealing with competing house styles. Tellingly, it is the most common Word task that fee earners refer to support staff. Some 56 per cent of lawyers task secretaries to tackle this problem. Often, the problem arises when multiple law firms review different parts of the same document but implement their own house style.

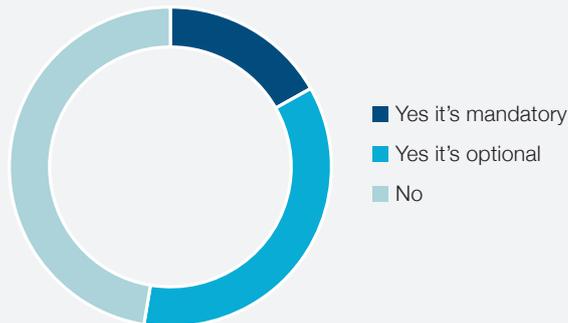
“A lot of the time you send documents out to a smaller law firm and you get them back with their own house style applied to all of the parts they worked on,” continues Flanagan. *“Most law firms have a house style that seems to get applied to everything they do even when it is someone else’s document. Solving this problem takes up valuable time. People don’t tend to be gracious and leave it in the style of the firm that created the document. But to be fair, it is not easy to make additions in another firm’s house style.”*

How law firms are plugging the knowledge gap

Varying commitment to training

Our survey data reveals there are large differences across the legal industry when it comes to investment in Word training. Just 53 per cent of surveyed fee earners said their firm offers training, mandatory or otherwise. The remainder aren't offered any training at all.

Fee earners: Does your firm provide Word training?



Survey respondents consistently stated that Word training is not mandatory because it is assumed that new recruits already know how to use Word. But as revealed earlier, the survey data says otherwise.

"Fifteen years ago it used to be the case that when people arrived at the firm you taught them how to use Outlook and how to use Word," explains Abby Ewen, IT Director at BLM. "Nowadays, you don't do that. When they arrive at the firm you assume they can use those applications. You teach them how to use case and document management systems and the finance system, for example, but you wouldn't necessarily focus on Word. But maybe this is an incorrect assumption."

Even when training is available it can be challenging for lawyers to attend given the numerous constraints on their time, which includes other training courses that are considered more important. But the survey data also reveals many fee earners are simply not aware that Word training is available. Indeed 80 per cent of surveyed IT managers said their firm offers Word training. This is significantly more than the 53 per cent of fee earners that stated Word training is available. It seems firms need to communicate what training is available to their staff.

"YOU TEACH THEM HOW TO USE CASE AND DOCUMENT MANAGEMENT SYSTEMS AND THE FINANCE SYSTEM, FOR EXAMPLE, BUT YOU WOULDN'T NECESSARILY FOCUS ON WORD"

ABBY EWEN, BLM

Custom Microsoft Word environments and tools

Of course, training is just one way firms can improve their staff's use of Word. Many firms have invested in customising their Word environment to make it easier to use. For example many firms use customised Office environments to ensure document consistency and greater efficiency. While this approach can be helpful, over customisation can result in a lack of understanding of the underlying functionality, which might create problems for lawyers when they move to another firm or are seconded.

"We make it easy for lawyers but as a result we put a veneer over the Office environment which means they don't have to learn a lot about it," explains Abby Ewen, IT Director at BLM. "A lawyer being seconded to a customer, which happens quite a lot, is faced with a Word environment they might not recognise because it's not a BLM-customised environment. It almost becomes a vicious circle where we are all over-engineering everything."

Meanwhile some firms are streamlining their Word environment by investing in tools that not only provide customised Office environments, but can help with other tasks such as transferring content into house styles through a paste tool. This can be particularly useful for recently merged firms.

"We purchased a product that helped us with the rebranding process following a merger in 2013," explains David Lee, IT Director at Bond Dickinson. "It helped create a new suite of templates and a reuse tool so that old documents and precedents that existed within the old document management system could be opened and rebranded for use under the merged firm."

"It's really useful because the paste tool covers the rebranding requirements for when we rebrand again. We can even use it with documents from outside the firm. For example, if I have got a letter that I have created many moons ago when I was part of a different firm, I can create a brand new letter which is blank, and based on the new letter template I can open the old letter and highlight the contents within it, copy and then paste that into my new document. It will paste it into my new document based on the house style that's within the template that is attached."

In-house document specialist

Some firms are also employing document specialists to deal with formatting problems in order to free up fee earner time.

“We have a group of document specialists within the firm that are specifically trained to deal with formatting problems,” explains Ronnie Myers, associate at Burges Salmon. “They are a group of secretaries who ensure our house style works seamlessly with Word. If you have any formatting problems you would normally send it to them to deal with. Likewise if you have an external document, or for whatever reason you have a document that isn’t in house style, they would be able to rectify the problem quite quickly.”

Fee earners: To what extent do you get secretaries / support staff to assist you updating a document to your house style?

40%

I nearly always ask support staff to do this because it's not generally a good use of my time

17%

I nearly always ask support staff to do this but would prefer to be trained how to do it as it would save time

17%

I mainly do this myself but sometimes ask support staff to help

27%

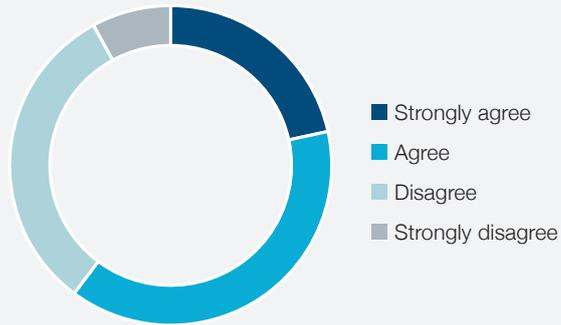
I always do this myself

On the one hand this approach is advantageous as it means that formatting tasks are carried out at zero cost to the client. However, on the flipside, an over-reliance on support staff can cause problems for fee earners working outside of office hours. A lawyer who is finalising an agreement in the early hours of the morning won't be able to rely on the normal support network and therefore could be caught out.

AN OVER-RELIANCE ON SUPPORT STAFF CAN CAUSE PROBLEMS FOR FEE EARNERS WORKING OUTSIDE OF OFFICE HOURS

Investment in Word

Fee earners: To what extent do you agree that your firm has invested in word (developed tools within Word)?

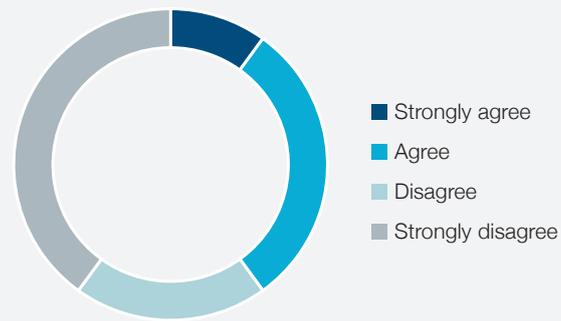


While some firms are investing in tools to make Word more efficient, most aren't or at least not to a sufficient level. Some 40 per cent of fee earners believe their firm has not invested or developed tools in Word. The view from IT personnel is similarly damning. Almost one in three believe their firm has failed to invest in Word while a further 60 per cent believe their firm does not get the most out of Word.

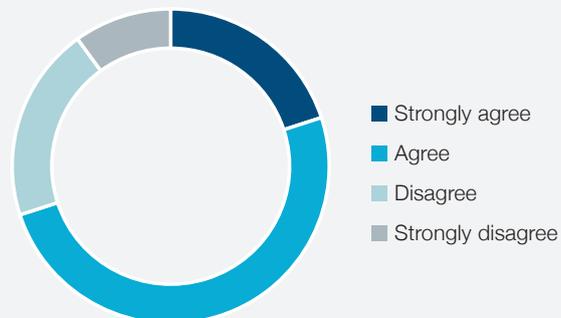
40%

FEE EARNERS BELIEVE THEIR FIRM HAS NOT INVESTED OR DEVELOPED TOOLS IN WORD

IT staff: To what extent do you agree that your firm gets the most out of Word?



IT staff: To what extent do you agree that your firm has invested in Word (developed tools within Word)?



About the research

The survey and report were written in collaboration with The Lawyer. The survey was undertaken by The Lawyer in July and August 2017, and was completed by more than 150 fee earners and senior IT staff at law firms.

To supplement the survey, interviews were conducted with the following individuals:

- > Frank Flanagan, partner at Mason Hayes & Curran
- > Ronnie Myers, associate at Burges Salmon
- > Abby Ewen, IT Director at BLM
- > David Lee, IT Director at Bond Dickinson

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We are a specialised consultancy that has been working with law firms for over 20 years. We develop the interface and tools in Microsoft Word to make the experience simpler and more intuitive for lawyers, fee earners and support staff.

Our work saves substantial time for users and makes documents more accurate and consistently branded. The system reduces and simplifies the management task for the IT team, and integrates seamlessly with the IT environment (such as DMS systems, Active Directory and CRM systems).

We have three main products.

Brochet Legal templates

The core product that we create to adapt Word's desktop and add the various tools, allowing users to produce all their legal documents – letters, agreements and court documents.

The key benefits:

- > robust and easy to use automatic legal numbering
- > improved productivity
- > professional client-facing documents
- > straightforward experience which is popular with all users
- > easy to manage and keep up to date
- > smooth integration with linked IT systems.

“I think Brochet is an excellent product and you are very good company to work with.”
Head of IT, Top 200 law firm

Brochet Paste

A unique one click button to convert and repair any legal numbered documents into your house style that:

- > can be used directly by lawyers and fee earners as well as support staff
- > works with any content whether copied from Word files, plain text files or direct from the internet
- > automatically restyles text, applying the correct legal paragraph styling, but with no need to map styles
- > adds comments to the updated document to alert users to any changes made
- > does not import unwanted paragraph styles into a document.

“We are unaware of any product that has the capability of Brochet Paste.”
IT Director, Top 50 Law firm

Brochet Cross reference

A super simple tool that dramatically speeds up converting manual cross references to automatic ones.

- > 'Find Next' button highlights and takes user to next manual cross reference
- > one click adds reference in the client's preferred house style
- > can create automatic links to manual numbered paragraphs.

“It is amazing that something so simple saves so much time.”
Legal Secretary, Top 50 Law Firm

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If you have any questions, would like to see a demonstration or discuss any projects David or Nikki would be pleased to hear from you.

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