



DEG Member Survey

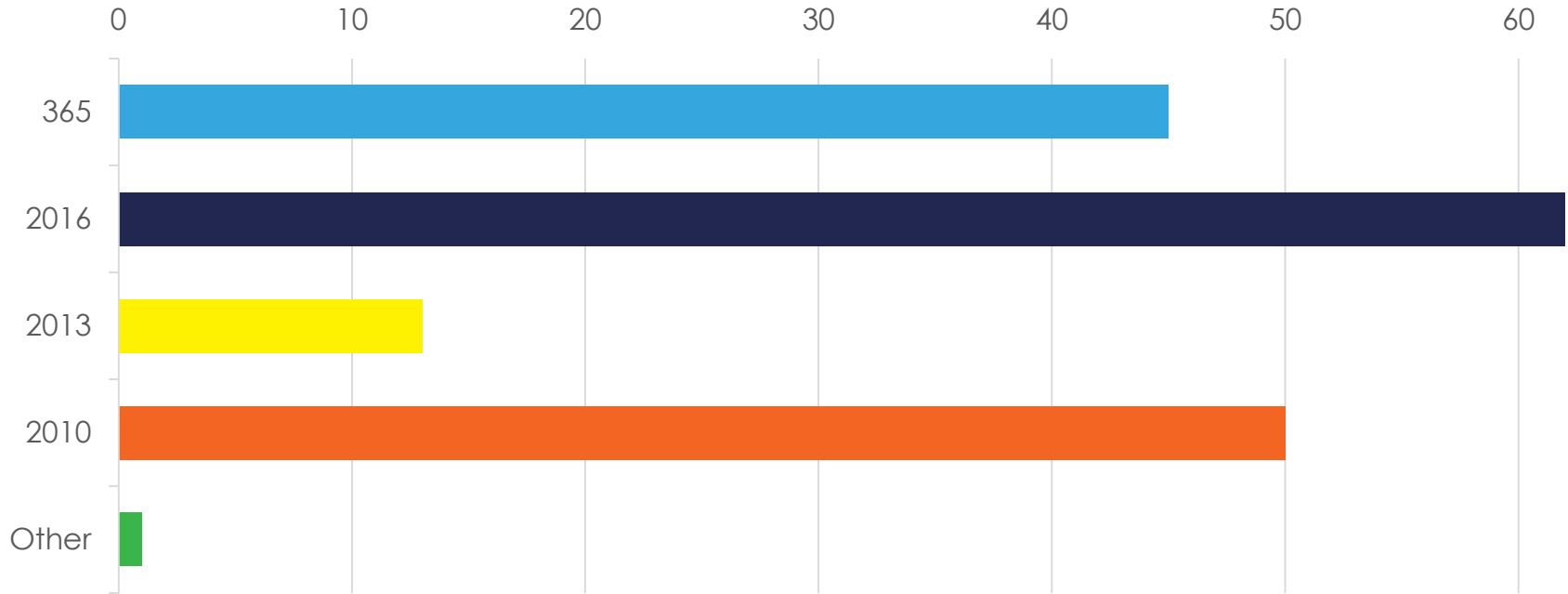
Results 2019

Responded to by 173 members giving a snapshot view of current software projects and plans for the future.

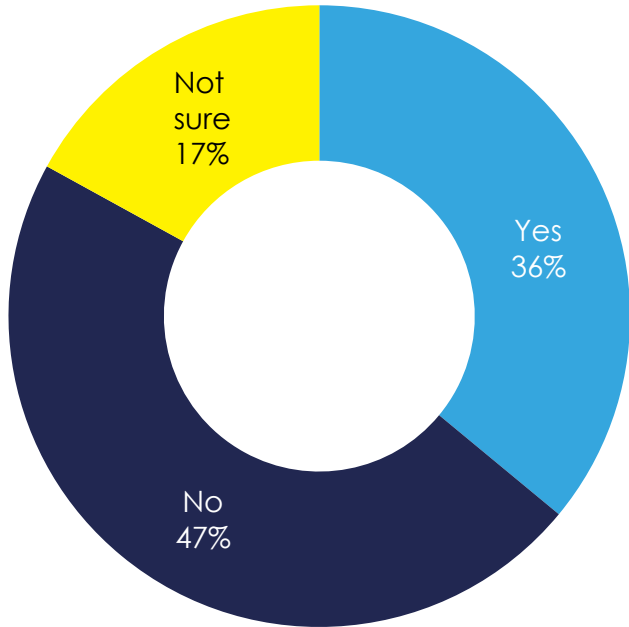


Document Excellence Group

Which version of Microsoft office is used predominantly within your firm?

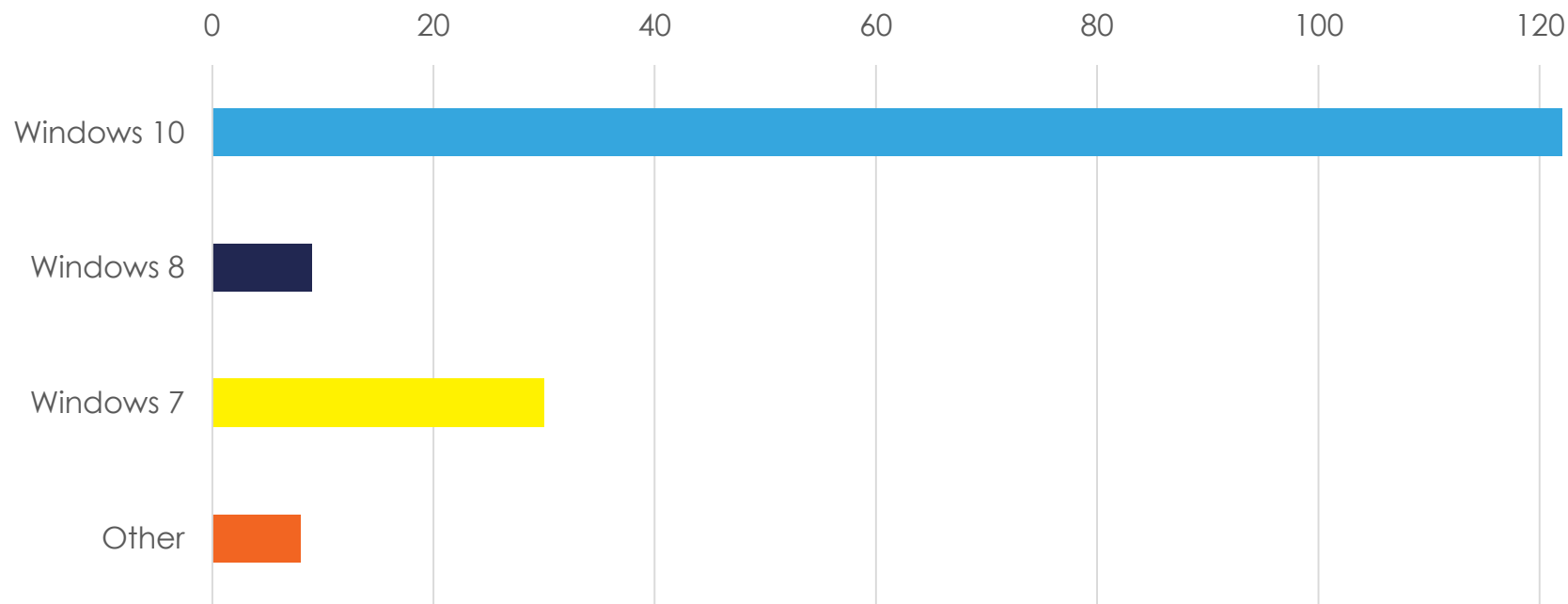


Is your firm planning to upgrade Office within the next year?

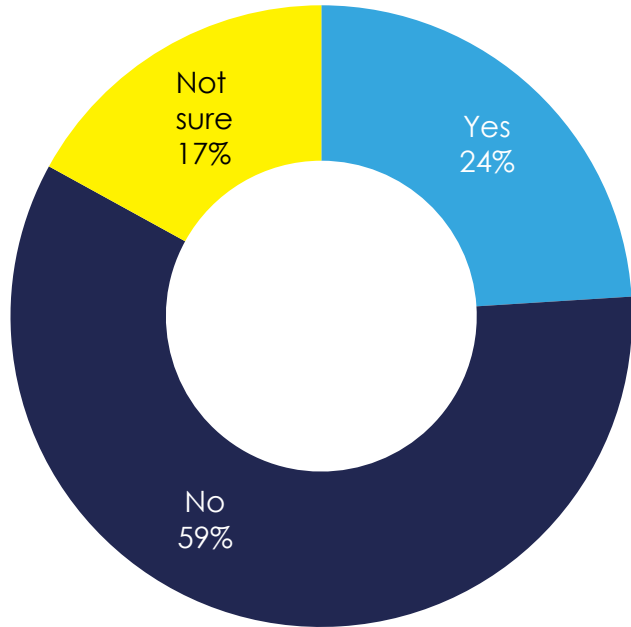


If yes, what are you upgrading to?	
365	17
2019	2
2016	6
Unknown	1

Which version of Windows does your firm use?



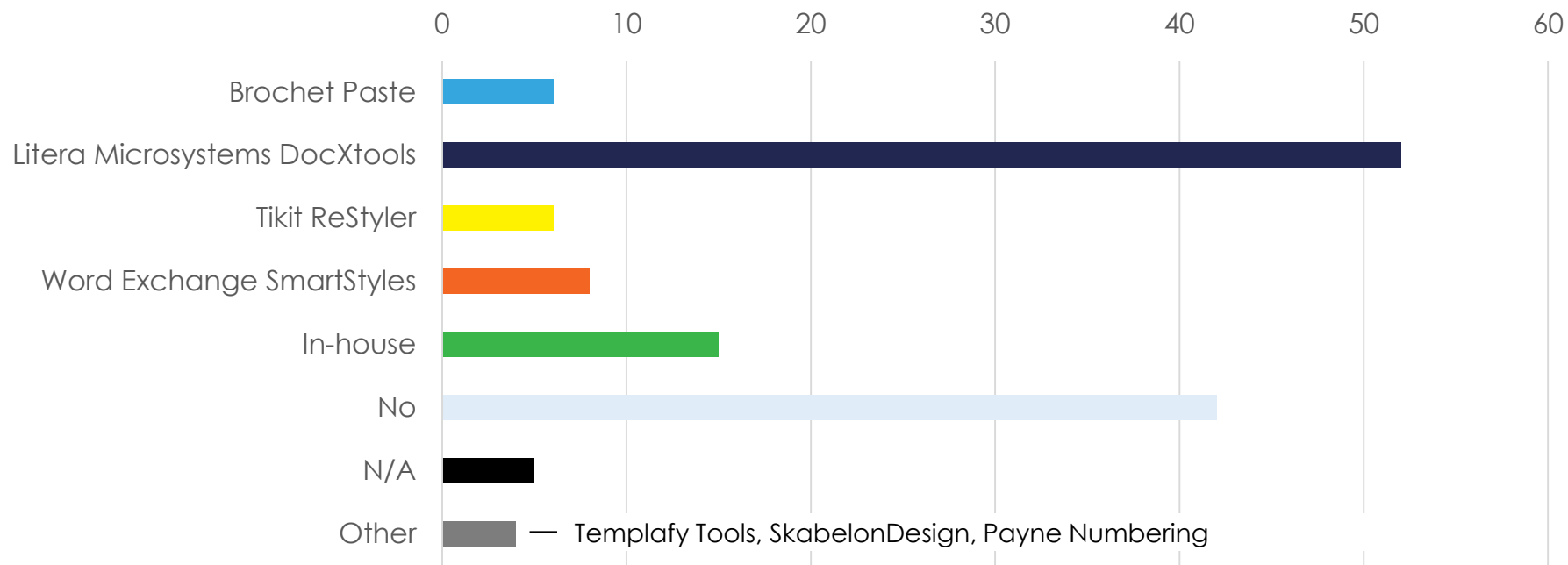
Is your firm planning to upgrade Windows within the next year?



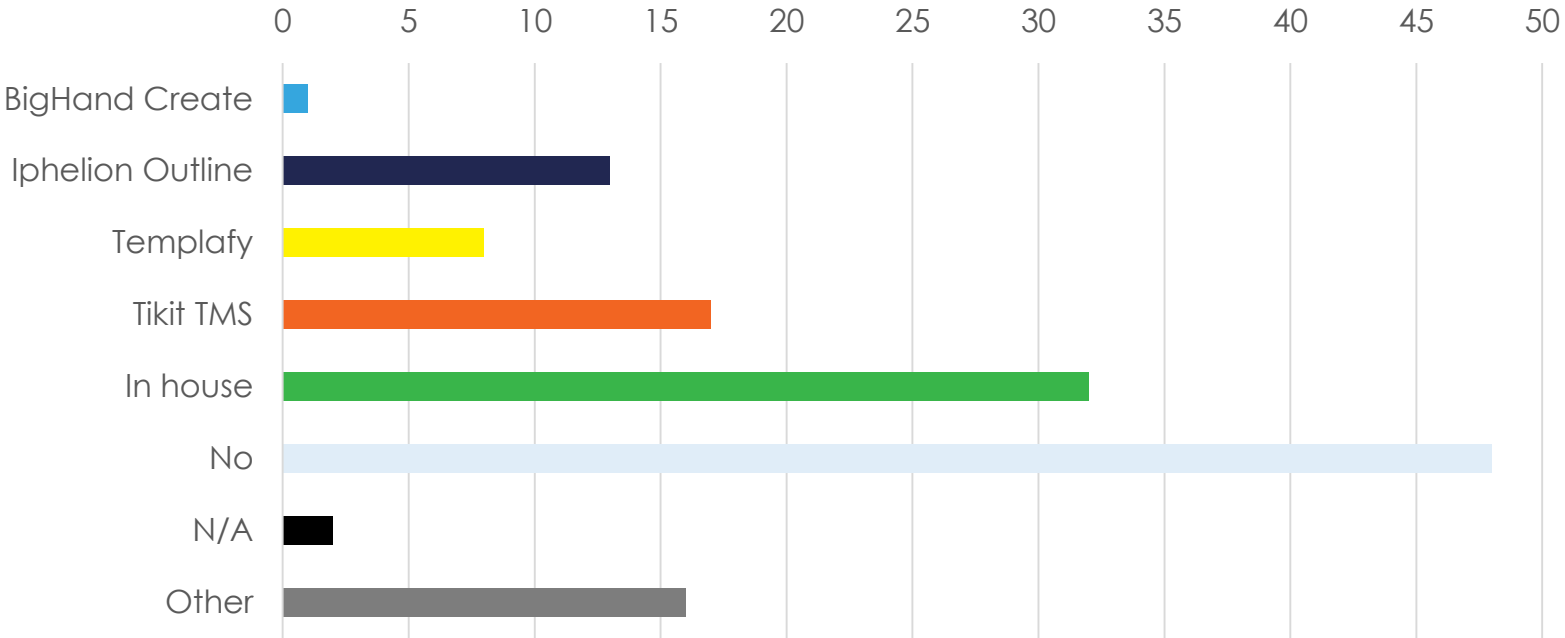
If yes, what are you upgrading to?

Windows 10	25
macOS	1

Does your firm use any reformatting tools?



Does your firm use a template management system?



Does your firm use a template management system?

Other

Currently Tikit, but moving to Iphelion Outline

HotDocs

Currently creating new templates in house

Innova and Forte

Legal Evolve by Practice Evolve

Litera Microsystems

MacPac

Mattersphere and Intelliworks

Word macros and templates within CMS

Payne Forms

Has your firm recently introduced software that you believe has had a major impact?

3e MatterSphere case management system - Is a completely different way of users doing their everyday tasks

E-signatures has streamlined and digitised a previously cumbersome process

Updates to all software to latest versions, and a new template management system to better globalise throughout offices

BigHand and DocXtools

Net Documents

iManage DMS. Major improvement to document searching capabilities and ease of filing emails

Capacity planning software... Development team much expanded with innovation policy

iManage Work 10

Aderant and about to introduce a new DMS. Massive changes for the users and some have struggled with this

A Restyling tool I created which will restyle any external text/document into house style in minutes

Has your firm recently introduced software that you believe has had a major impact?

Clause Companion for quick data retrieval of common content

Skype for Business

Intapp Time and Intapp Open for recording time and opening matters. Much quicker and easier to use.

Intelliworks in our Residential Conveyancing Department. This is a CMS whereas Mattersphere is only used as a DMS. Huge impact on staff

NetDocs - some people love it but it is a lot slower being in the cloud

Office 365 and a complete cloud transformation (no local data/storage/servers), all personal data/profiles are using Microsoft cloud services (ex. OneDrive)

pdfDocs, Objective Manager, Peakon surveys

Change Pro 10.4 gives you the ability to compare multiple file types (Excel, PowerPoint) and provides a powerful OCR engine

WebEx

Capacity planning software... Development team much expanded with innovation policy

Has your firm recently introduced software that you believe has had a major impact?

Not recent, but SharePoint continues to be a difficult document management system

Just started to roll-out Office 2016.
Making a big difference to speed of systems & new features

TimeCloud - ability to record time digitally

Contract Companion has had a major impact because it spots errors in your document that the human eye may miss

DocXtools! Hugely...

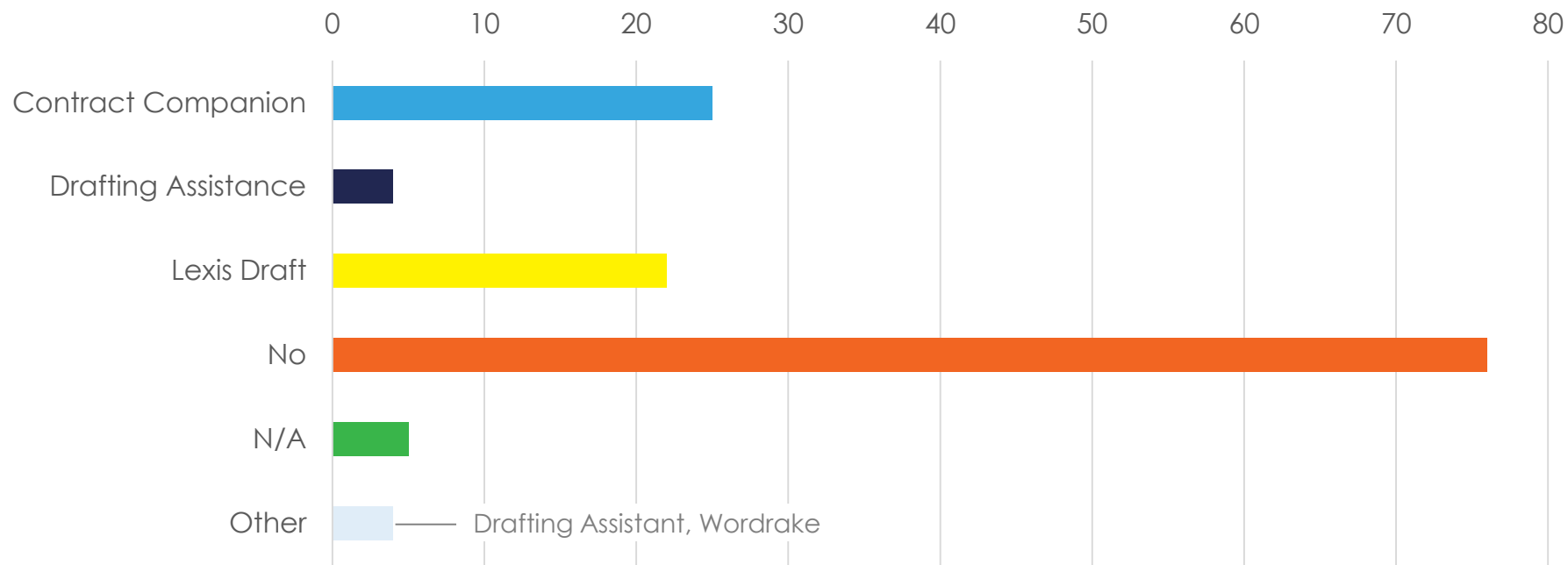
Not around document production, but Peppermint

LexisDraft - huge help with drafting documents

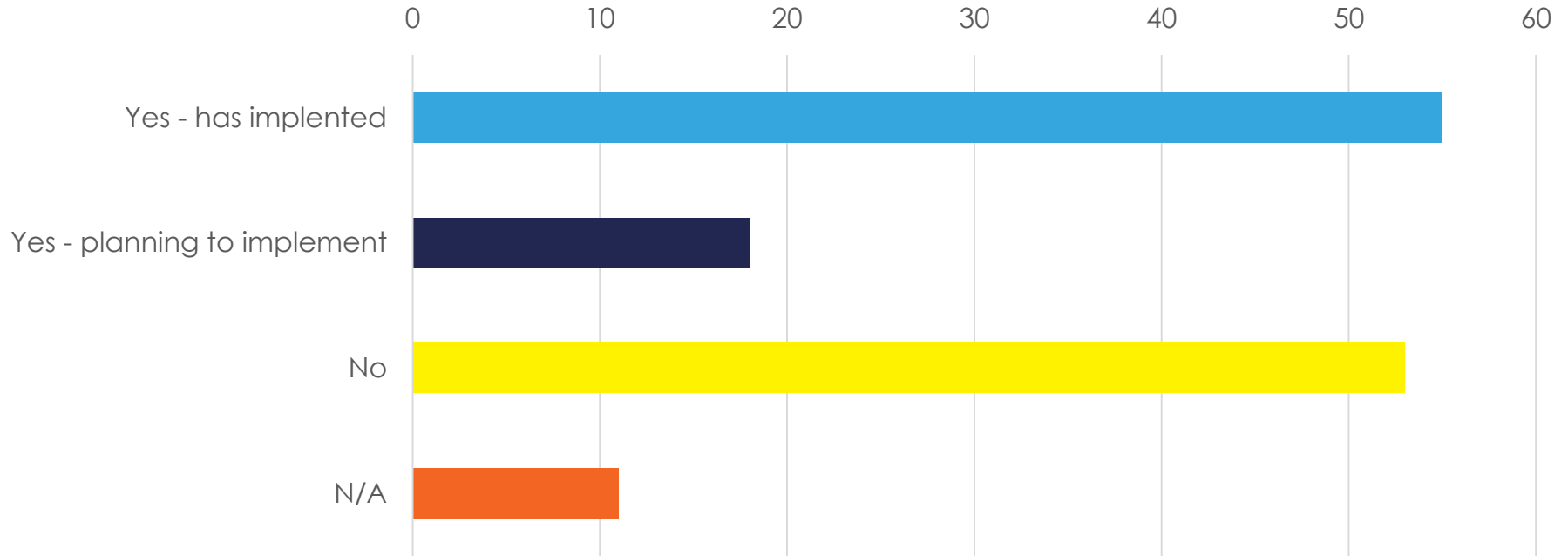
Nitro - much cheaper license than Adobe

Litera Desktop

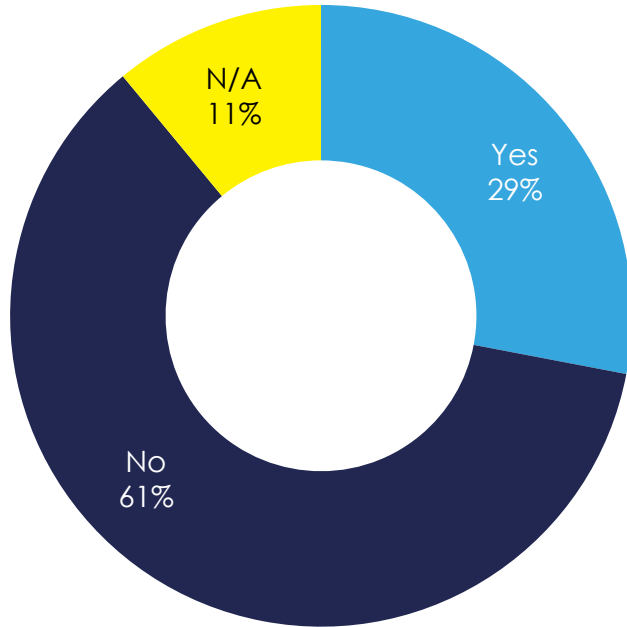
Does your firm use any proof reading tools?



Has your firm implemented document automation or is it planning to do so?



Has your firm adopted the UKDEG Standard Styles framework for legal agreements?



If no, is this being considered?

I am putting them into my new templates

Looking to do this in May/June 2019

In process

Not currently, although some new styles are being added this year and I have convinced the firm to adopt the UKDEG naming convention for those

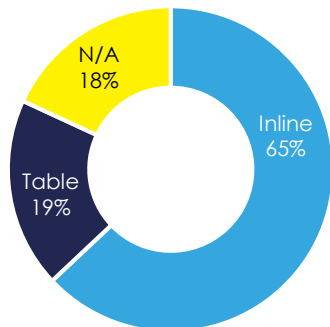
We have adapted it to fit in with how the lawyers work.

This is something we plan to do when we introduce our new house style

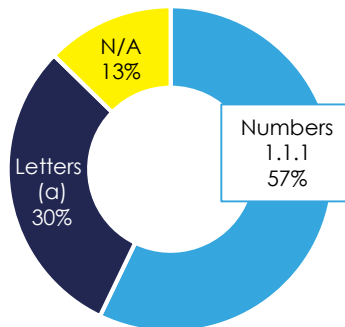
Yes – we need more information!

Formatting Preferences

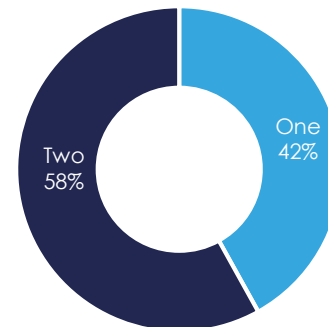
Are your Definitions formatted inline or in a table?



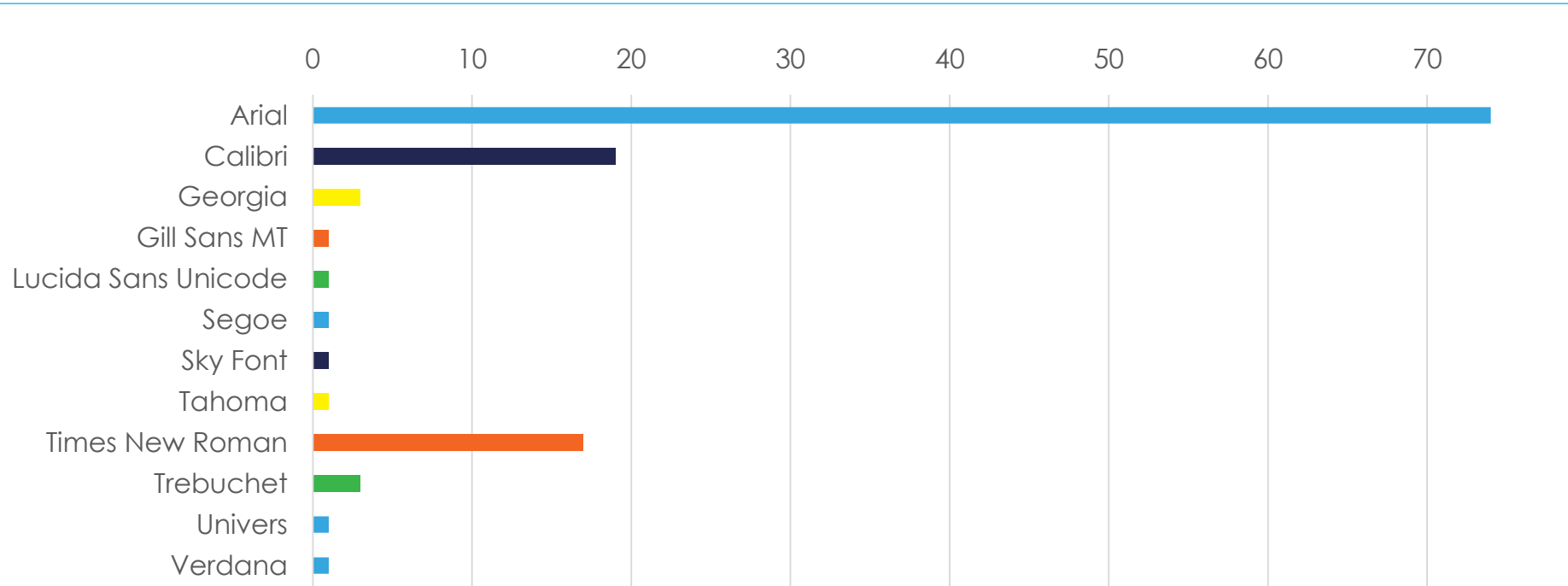
Which numbering format do you use for paragraphs at Level 3?



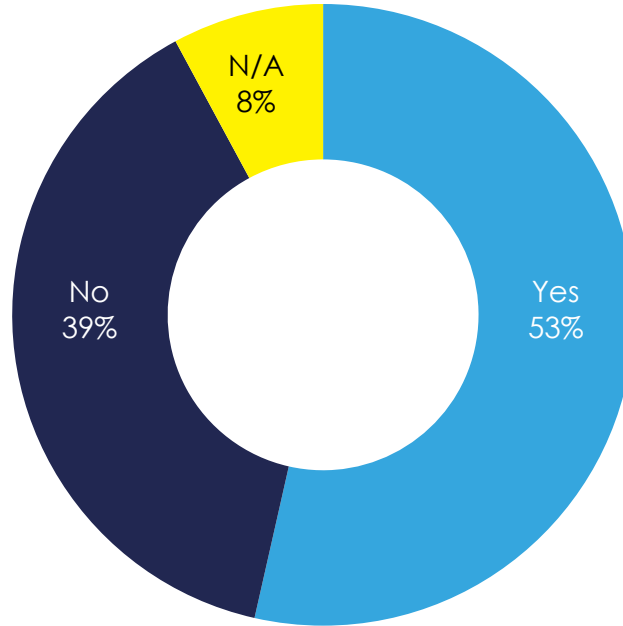
Do you use one space or two after a full stop?



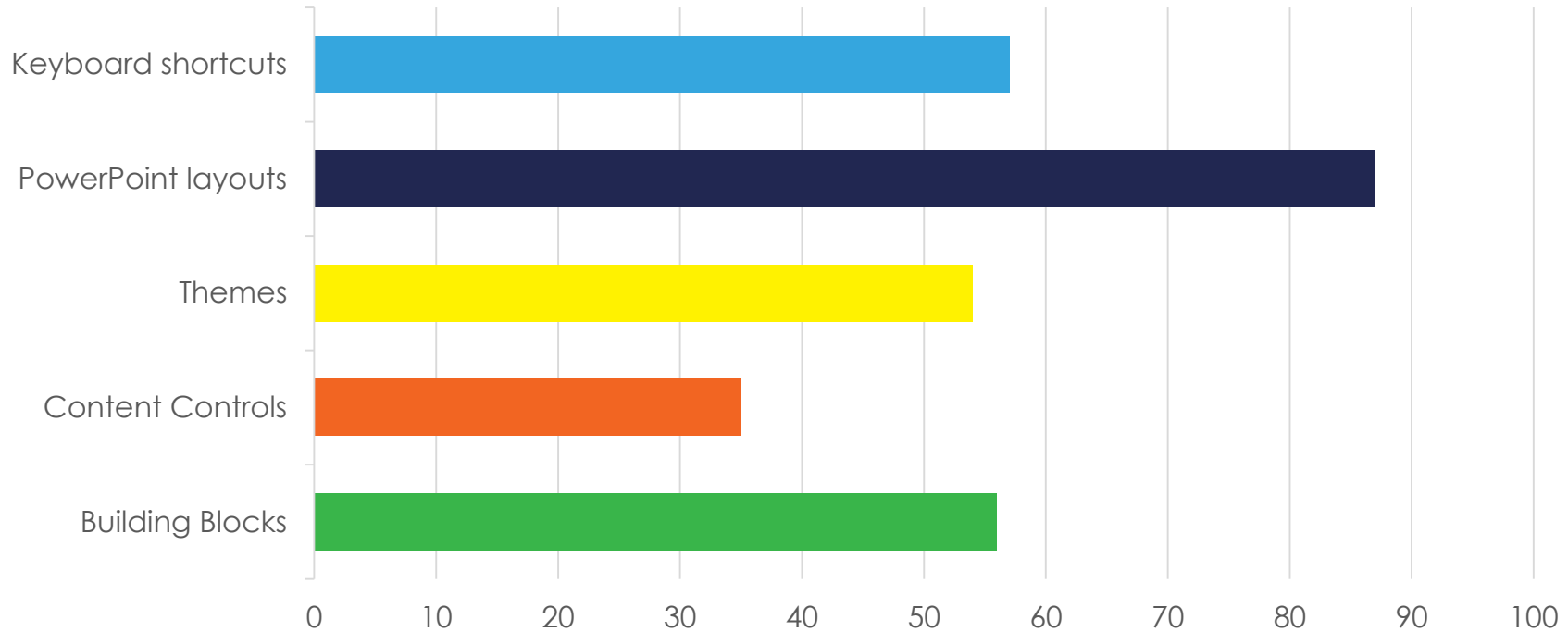
Which font is primarily used within documents?



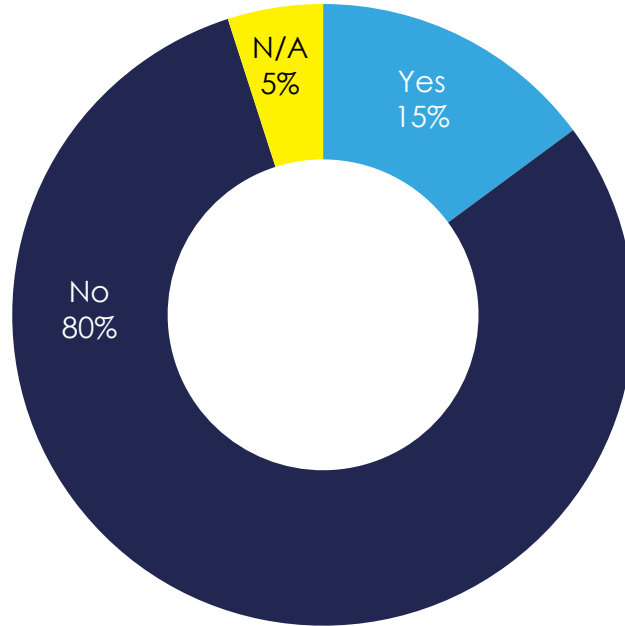
Does your firm have a central Document Production team?



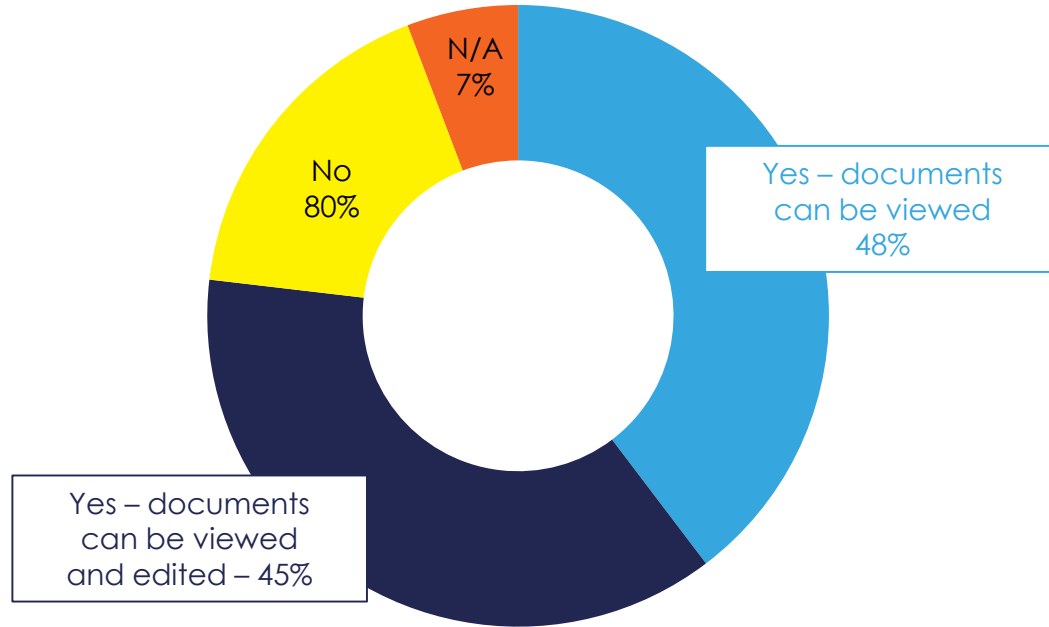
Have you customised or configured any of the following to make them firm-specific?



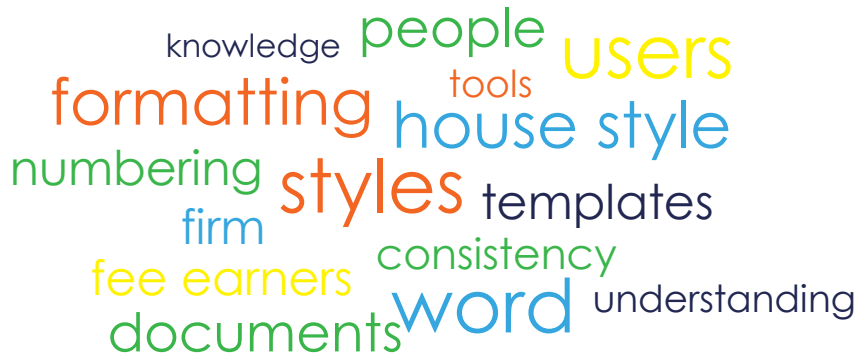
Is Word co-authoring used to allow multiple people to edit a document at the same time?



Are Word documents available on mobile devices such as smart phones and tablets?



What is the biggest challenge you face when working with documents?



Summary	
DMS	3
Technical - Word	15
Technical – other	1
Training	14
Workload	1

What is the biggest challenge you face when working with documents?



Multiple DMS and Word ribbon structures within the same firm.

The document management system for mobile users - we do not have a connection set up (although it is available).

Being able to get it open and closed without having issues with Worksite.





What is the biggest challenge you face when working with documents?



Consistency and individuals using the Word styles rather than manually formatting and numbering.

Pasting in text from somewhere else and bringing in formatting which corrupts documents and styling. Excessive cross referencing that tends to corrupt documents.



What is the biggest challenge you face when working with documents?



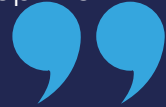
Broken client documents • Consistency and formatting

Document stability when using other firm's documents
formatting

Inadequate Templates and Styles • Inline formatting
and cross-referencing

Lack of tools • Other firms/people messing up the firm's
documents.

Paragraph styling being incorrect.



What is the biggest challenge you face when working with documents?



Paragraph numbering being incorrect. DocXtools helps greatly, but this always depends on the document

Performance - slow opening times

Remote working, different versions/compatibilities

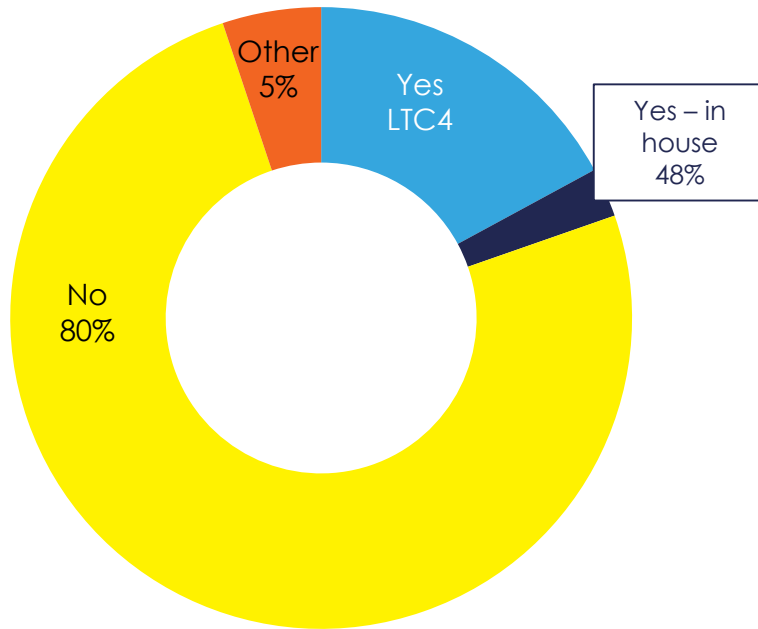
Track changes and comparisons

Version Control Process

Versioning through LNVF



Has your firm adopted LTC4 or any other system of Core Competencies?



Other - detail

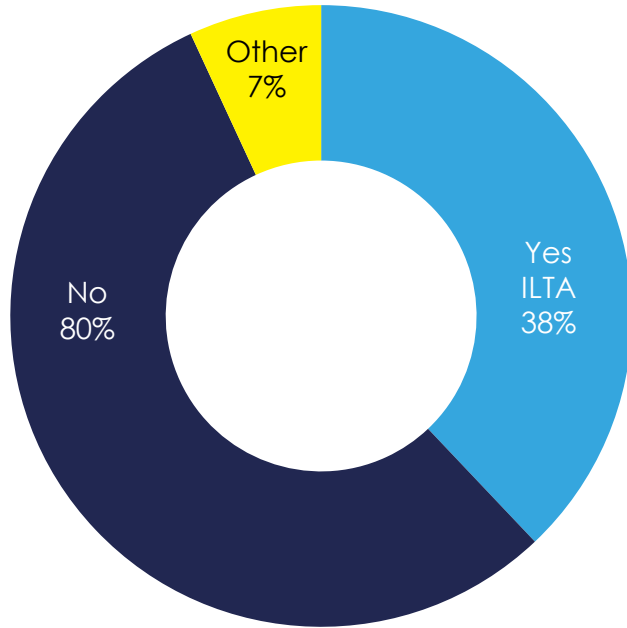
We are implementing an LMS soon and will be considering LTC4 thereafter.

We have developed our own competency framework.

Reliance

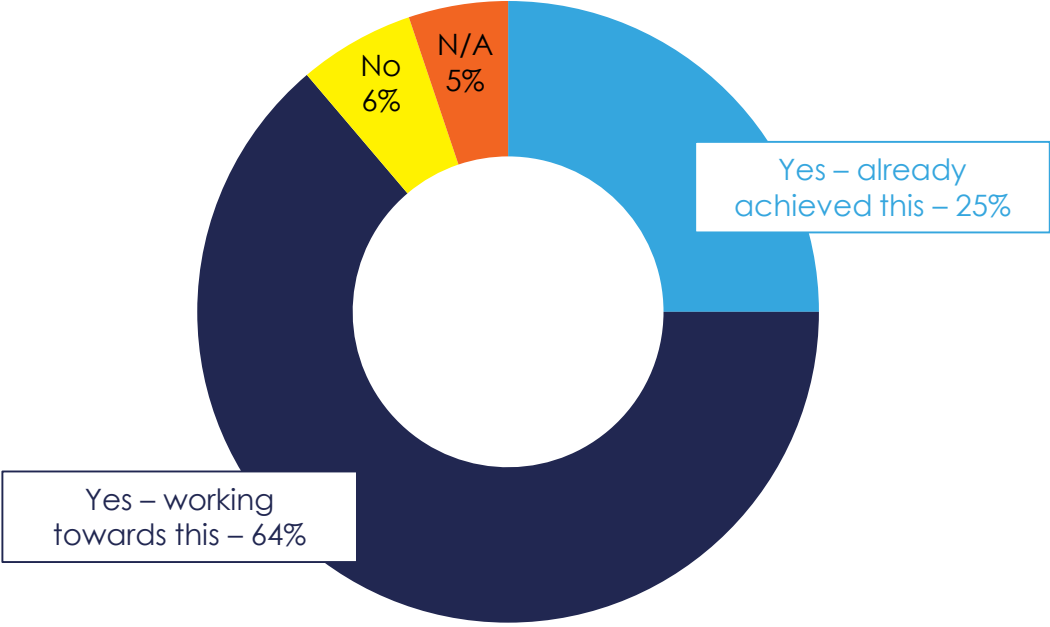
Not sure

Has your firm adopted LTC4 or any other system of Core Competencies?



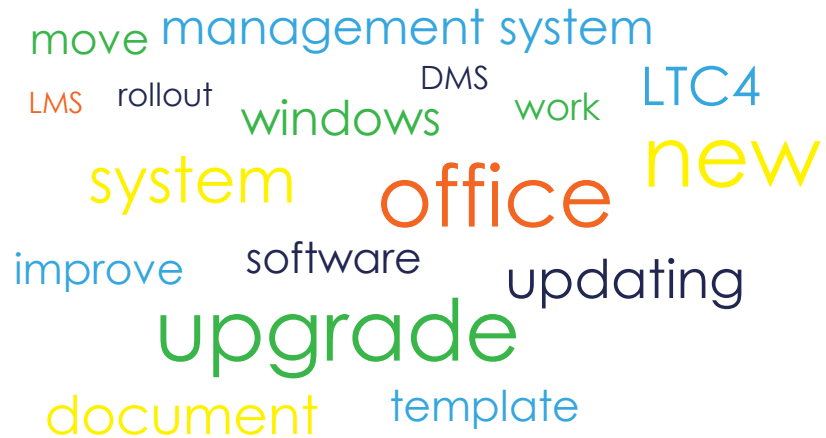
Other - detail	
CLOC	1
Individual memberships	1
Unsure	6

Is your firm trying to reduce its reliance on paper?



What are you focused on this year? (summary)

2019 Focus for Members	
Business Development	4
Compliance	2
Document Improvement	3
Process Improvement	11
Technology	35
Telecoms	1
Training	8
Training and technology	4
Wellbeing	2
N/A	2



What are you focussed on this year? (Risk, BD, templates, workflow responses)

Achieving a consistent house style and formatting tools.

Updating document production templates and styles.

- Attracting new clients
- Marketing
- Rebranding
- Making sales

GDPR compliance. Increasing security around matters, finalizing electronic archiving policy, upgrading most of our core systems.

What are you focussed on this year? (Risk, BD, templates, workflow responses)

Precedents and case work flow
Streamlining standard responses, creating libraries of approved responses
Merging products • Agile working
A template design refresh with potential template management system change in the next year or so

Improving system performance and user confidence • Winning the war on paper!
We have made big strides in the right direction but there's a way to go!
Increasing efficiency and improving quality
Workflow management templates
Vendor consolidation

What are you focussed on this year? (Technology responses)

- Litera Desktop
- Introducing a template management system
- Implementation of new document technologies

Technology innovation!

- Document Management system implementation
- DMS replacement
- iManage upgrade and move to cloud

Testing and implementing new case management system. Creating new "on going" training for existing staff. Implementing further the case management system, utilising more features and integration with conveyancing software.

What are you focussed on this year? (Technology responses)

- New 3E PMS and rollout of Windows 10, Office 2016 and iManage Work 10
- Intranet re-brand
Kickstarting new PMS replacement
- PMS replacement and process improvements
- Adoption of Peppermint for CRM and CMI
- Elite 3E rollout

20 respondent are upgrading core systems such as Windows 10, Office 365, Office 16, DMS and Telephony

What are you focussed on this year? (Training and Wellbeing responses)

Education around working well with documents.

LMS

LTC4

Continuing to engage attorneys in document quality and capability issues.

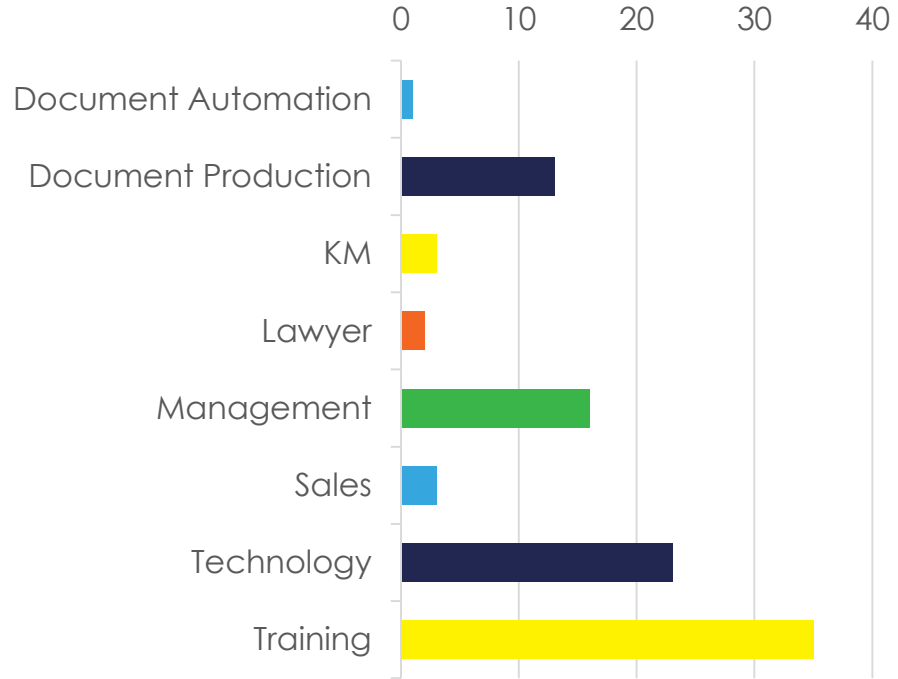
Less stress

Office 365

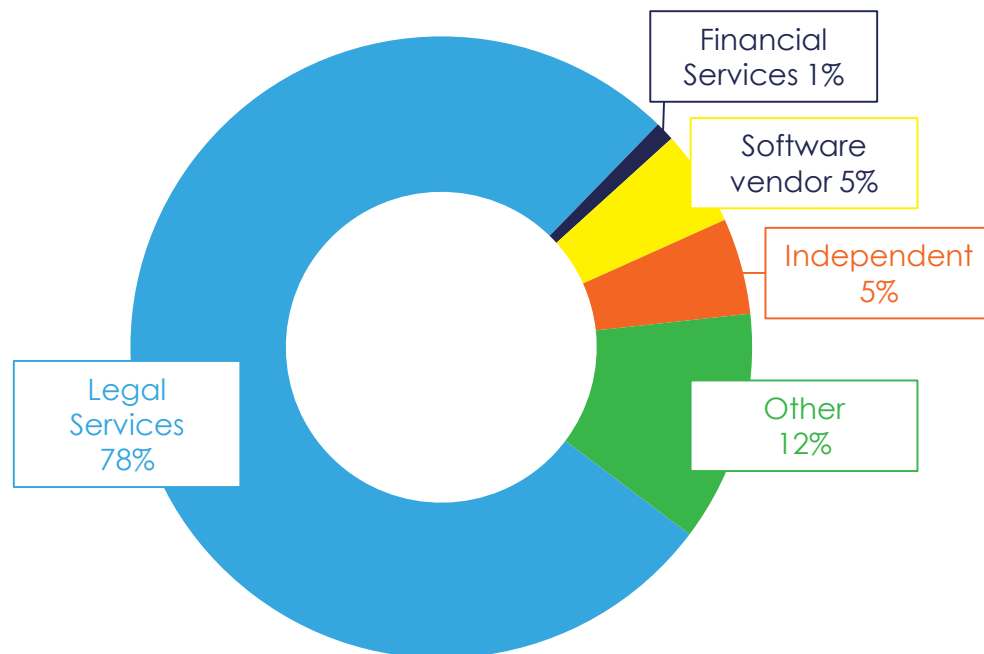
Getting people to use NetDocs and improve their productivity.

New hire redevelopment
- Onboarding!

Roles



How would you categorise your firm?



Other - detail

Implementation partner	1
In house legal team	2
IT Support Services	1
Legal and Financial	1
Manufacture and licence electric motors for cars	1
Medical	1
Real Estate	2
Shipping Protecting and Indemnity group	1
Software Development	1
Training Company	1

Thank you
to everyone
who took part in
the Survey.

