What triggers law firms and businesses to review their Word desktop and tools?

Microsoft Word remains an everyday part of lawyers' and document experts' lives. As a business or law firm grows, so does the complexity of its systems, including the management and integration of documents and templates. This can become overwhelming, and the realisation that the effectiveness of a team is being compromised often sparks a project to review the desktop and Word tools.

At Brochet, we see two main types of businesses: law firms and corporates. Their needs are similar, but they can have different priorities depending on whether the focus of the documents is legal, marketing-driven or administrative.

Client concerns tend to fall into three main areas

Productivity

Productivity often comes top of the list because it has the most direct link to cost savings. But better productivity also means less frustration for end-users and easier collaboration within teams.

Word - even for the most skilled user - can be time-consuming. When people get something wrong – maybe with paragraph styles, numbering or branding - it can all spiral out of control.

We find that by simplifying or limiting what users are offered, you can give them the options they really need, at their desktop, without having to hunt through all the myriad of tabs and commands. You can also add small things that people love. For example, we have a tool that finds square brackets within documents which lawyers love. It helps users fill them in and counts all the brackets at the end – ensuring none have been missed, giving added reassurance.

Finally, identifying the repetitive tasks specific to the business which can be automated - such as updating the header text across multiple sections - means we can help save valuable time, for fee earners and all other users.

Content accuracy and management

For some users, the integrity of the content of a document is critical. In many documents, it is a legal requirement to have the correct registered business details - which immediately becomes more complex with more than one legal entity within one organisation. Users also need to be confident in the integrity of the content itself, for example that the legal numbering and cross references are accurate.

A dedicated legal 'desktop' in Word can allow the smooth integration with document and case management systems, add a set of company-specific productivity tools, or host third-party add-ins to ensure the integrity of the workspace.

Brand presentation

Consistent presentation of brands tends to be more critical in consumer-facing businesses, however it is still relevant in the B2B world. So, whilst it's not a big factor in legal documents, law firms are mindful that their proposals and business development literature should be professional and distinctive. Some firms have separate divisional logos so need to carefully manage the graphics, adding further complexity.

To sum up, for any client understanding the relative importance of these three dimensions – productivity, content and brand – will underpin their decisions on how to approach the efficiency and usability of their Word and desktop tools.

brochet.co.uk