

THE CASE FOR GOLD STANDARDS + WORD PROCESSOR AUTOMATION

BENEFITS OF FORMS PLUS

AN EXCELLENT STARTING POINT FOR EXAMINING YOUR WORK FLOW

This approach is an excellent testing ground for any further automation in that it starts your analysis process. As you break down a generic pleading template, standardize signature and Certificate of Service and replace core information with "click here and type" instructions, you begin to see the cross purpose use of the core template and how it relates to say, requests for production and answers/replies. Analysis of each of your form/document types and your choices for variable or fill-in-the blank information will help you decide on further information gathering/sharing needs and at a bare minimum help you rethink client/case intake procedures.

LEARNING HOW TO USE WHAT YOU ALREADY OWN IS A GREAT INVESTMENT

No matter what road you take in the future, the investment in a Word Processing package is a given. Leveraging as many features as possible keeps the initial costs of software down, and exploration of simple automation options is an educational experience that is not wasted even if you move on to expanded options.

SIMPLICITY OF CREATION

While WordPerfect and Microsoft Word vary in their arsenal of automation options, from "click here" and "ask" fields in Word to keyboard merges in WordPerfect, the concepts are relatively simple to master and cost not much more than time and investigation. Very small libraries of terms, conditions and optional clauses can be maintained with the aforementioned AutoText/QuickWords and other tools.

QUICK AND EASY TRAINING

Training on the use of Word Processor forms automation is also an easily assigned task, and when combined with detailed formatting/styling options can yield professional and consistent results.

ABSOLUTE FLEXIBILITY

Don't like the look of a form? Want to add new clause options? No programmer necessary here. This means that with some basic knowledge you have absolute control over the work product environment.

DRAWBACKS

You must have a strong grasp on jurisdictional rules and requirements. No one is going to warn you that the form does not meet the guidelines.

Updates or changes in rules and regulations mean that you are responsible for a forms library overhaul.

Though training may be a simple matter, it's in the hands of the firm.

Changes in core word processor technology are your problem. If a newer version of your favorite program alters, adds, or eliminates a feature, it's up to you to re-think your template/forms library.

Decision based (if/then) logic can be well beyond the native capabilities of the Word Processor without programming knowledge.