

WHAT IS DOCUMENT ASSEMBLY?

For many small and solo law firms, document drafting is where time quickly disappears. A client engagement letter that should take five minutes stretches to thirty as you hunt down the right template, swap out last client's name, and check that every jurisdiction-specific paragraph made it in. Multiply that by every matter you open, and the inefficiency adds up fast.

Document assembly software exists to eliminate that kind of work. These tools automate the creation of contracts, court filings, estate planning documents, closing packages, and virtually any other document your practice generates repeatedly. Done well, document assembly saves time, reduces the risk of inconsistency, limits errors introduced during manual editing, and makes it possible for non-attorney staff to produce first-rate drafts under attorney supervision.

WHAT DOCUMENT ASSEMBLY IS

Document assembly, also called document automation, is the use of software templates to generate customized legal documents from structured data. Rather than opening a blank Word file and editing last year's version of a contract, you run your template through an automated process—answering a series of questions or pulling data from your practice management system—and the software produces a finished document tailored to the specific matter.

At one end are simple merge tools, typically built into legal practice management software (LPMS). These pull existing data fields, like client name, matter number, opposing counsel, from the LPMS and insert them into a template. They do not ask questions; they transplant data. The result requires editing but saves time on mechanical substitution.

At the other end are sophisticated template-driven platform. These systems drive the user through an onscreen interview (a sequence of questions) and use the answers to build a document. The template contains not just blanks to be filled in, but conditional logic, repeating data structures (*e.g.*, lists of children, financial accounts, or property), calculations, and decision trees that generate different language depending on how the user answers questions.

UNDERSTANDING SOPHISTICATED DOCUMENT ASSEMBLY

TEMPLATES AND VARIABLES

In a traditional word processor, a template is simply a document with placeholder text you replace manually. In a document assembly system, a template is an active document where every variable, every conditional clause, and every list item is governed by rules the template designer has set in advance.

A variable is a placeholder that gets replaced with actual data during assembly. Variables like «**Client Full Name**» or «**Property Address**» can appear throughout a document and will be populated consistently from a single answer. Change the answer once, and it updates everywhere.

THE INTERVIEW

When a user runs a sophisticated template, the program presents an interview (a series of questions) that gather the information needed to complete the document. The template designer often controls everything about the interview: the order of questions, whether questions appear at all (based on earlier answers), how the questions are worded, and what kind of input each question accepts.

The interview can encode your entire decision tree for a given document type. For example, a will template might ask whether the testator has minor children. If the answer is no, every guardianship provision is suppressed. If the answer is yes, a follow-up question asks for each child's name and age, and the document's language adjusts automatically: one child, two children, three or more, each producing grammatically correct and legally appropriate text.

Platforms like Knackly and Gavel make the interview experience client-facing as well, allowing you to embed intake forms directly on your website or send them by link. Clients fill in their own information, which then flows directly into the document template.

CONDITIONAL LOGIC

Conditional logic is what separates document assembly from mail merge, and simpler document assembly programs from more complex ones. A conditional statement tells the template: include this paragraph if [condition], exclude it if not. In a commercial lease, for example, you might include a personal guarantee clause only if the tenant is an entity rather than an individual. In a power of attorney, specific healthcare provisions are triggered based on the jurisdiction. In a purchase agreement, the earnest money paragraph takes different forms depending on whether the buyer is financing or paying cash.

These conditions can be layered and nested. The result is a single template capable of producing documents that previously would have required maintaining a separate file for every variation or careful manual editing every time.

LISTS AND REPEATING DATA

Legal documents almost always involve lists of parties, assets, beneficiaries, conditions, or obligations. The number of items on any given list changes from matter to matter, and the document's language must adjust accordingly. Document assembly systems handle this through list or repeating-data functionality: the user enters as many records as the matter requires, and the template produces the correct language for whatever number was entered.

A will template, for instance, might produce any of the following depending on what the user enters for children:

- *"John Doe has no children."*
- *"John Doe has one child, April, age 20."*
- *"John Doe has two children, April, age 20, and Bethany, age 18."*
- *"John Doe has three children, April, age 20, Bethany, age 18, and Charlotte, age 16."*

The template handles verb conjugation, conjunction placement, and Oxford comma rules automatically. The attorney sets the logic once during template design; the software applies it consistently thereafter.

OUTPUT AND INTEGRATION

When the interview is complete, the software generates a finished document, typically in Microsoft Word format, that the attorney can review, edit, and finalize like any other Word file. Most platforms also allow users to save the answers from one matter to reuse when generating related documents, eliminating redundant data entry across a set of documents that share the same parties and facts.

Better platforms integrate with your LPMS so that data already in the system, like client name, matter number, contact information, flows automatically into the interview without rekeying.

AI DRAFTING TOOLS: A RELATED BUT DIFFERENT CATEGORY

Recently, a new class of tool entered the legal technology market at scale: AI-powered drafting software. These platforms use large language models, the same technology underlying tools like ChatGPT, trained or fine-tuned on legal documents to generate draft language from a prompt or a set of facts. Understanding how they differ from traditional document assembly matters for anyone evaluating technology for a law firm.

WHAT AI DRAFTING DOES

Traditional document assembly follows explicit rules written by a template designer. The logic is deterministic: given input X, the template always produces output Y. AI drafting works differently. You describe what you want and the model generates text based on patterns learned from vast amounts of legal writing, including potentially your firm's previously-drafted documents. The result is less like running a template and more like getting a first draft from a knowledgeable colleague.

AI drafting tools are well-suited to correspondence, contract clauses without highly defined parameters, motion drafts, demand letters, and other documents where the attorney's judgment and specific facts are more important than strict template adherence. Some platforms can review and redline existing documents, flag unusual or missing clauses, and suggest jurisdiction-appropriate language.

Clio Draft, formerly known as Lawyaw and now a Clio subsidiary, has moved in this direction, combining traditional template automation with AI-assisted drafting. Gavel launched its Gavel Exec product in 2025 with AI-powered contract review and redlining capabilities alongside its traditional workflow automation.

WHERE AI DRAFTING FALLS SHORT

For documents that require precision, consistency, and a defined structure, such as wills, deeds, closing packages, court forms, traditional document assembly remains the better tool. AI-generated text can be grammatically fluent but legally incorrect, and it is not deterministic: the same inputs may produce different outputs on different runs. It also cannot reliably enforce the kind of numbering schemes, cross-references, and defined-term consistency that complex legal documents demand.

AI drafting tools also raise professional responsibility concerns that the bar has not fully addressed. The attorney remains responsible for every word in a document sent to a client or filed with a court. AI output must be reviewed carefully, not treated as finished product.

Cost is another consideration. Enterprise AI platforms like Harvey, oriented toward large law firms and legal departments, price their services well out of reach for most small firm budgets, with minimum annual commitments in the range of \$288,000 or more as of 2026. More accessible tools are available, but the market is evolving quickly and pricing changes frequently.

USING BOTH

The most practical approach for many small firms is to use traditional document assembly for high-volume, high-consistency document types, like intake agreements, standard contracts, form-driven estate planning documents, real estate closings, and AI drafting tools for more bespoke work like correspondence, research memos, or one-off contract negotiations. Several platforms are beginning to combine both capabilities, so the line between categories is beginning to blur.

WHAT TO LOOK FOR IN A DOCUMENT ASSEMBLY TOOL

Before evaluating specific products, identify what your practice needs. The right tool for a high-volume residential real estate practice is different from the right tool for a solo estate planning attorney. Here are the key factors to weigh:

LPMS INTEGRATION

The more data your assembly tool can pull directly from your practice management system, the less rekeying your staff will do. Most leading platforms integrate with Clio Manage; some also connect with Filevine, Curo365, and NetDocuments. If your LPMS is less common, confirm integration options before committing.

TEMPLATE COMPLEXITY

Simple merge tools built into your LPMS may be adequate if your documents are straightforward and your variables are limited. If your documents require conditional logic, nested lists, or complex decision trees, you will need a dedicated platform with full interview-driven assembly capabilities.

CLIENT-FACING INTAKE

Several platforms now allow you to embed intake forms on your website or share them by link, with responses flowing directly into your document templates. This can eliminate a full round of data collection for many matter types.

TEMPLATE BUILDING

Consider who will build and maintain your templates. Some platforms use Microsoft Word as the template editor, which shortens the learning curve for anyone already comfortable with Word. Others use proprietary interfaces that offer more power but require more training. Ask vendors about onboarding support and the typical time to build a template for your document types.

OUTPUT FORMAT

Confirm that the platform produces documents in the format you need; typically Word, with the option to export to PDF. Some platforms also automate fillable PDF forms, which matters for practices that use court-provided forms regularly.

SECURITY

Client data is confidential. Ask any vendor about data handling practices, particularly where client data is stored and whether it is used to train AI models. Look for SOC II compliance and, if your practice involves healthcare matters, HIPAA compliance. Confirm that data is not shared with third parties without your consent.

PRICING STRUCTURE

Pricing models vary: per-user subscriptions, per-matter fees, flat annual licenses, and per-computer licenses all exist in this market. Evaluate total cost at your actual volume, not list price per seat.

CURRENT OPTIONS FOR SMALL AND SOLO FIRMS

The following is an overview of the principal options. This is not an exhaustive list, and [Lawyerist.com](https://www.lawyerist.com) maintains current reviews of many of these tools if you want more detailed analysis.

STANDALONE DOCUMENT AUTOMATION PLATFORMS

GAVEL

[Gavel](https://www.gavel.com) (formerly Documate) is a cloud-based document automation platform widely used in solo and small firm practices. It offers a no-code template editor, client-facing interview forms, conditional logic, and integrations with Clio and DocuSign. Gavel launched its Gavel Exec product in 2025, adding AI contract review and redlining alongside its traditional workflow automation. Pricing for the workflow automation tiers ranges from approximately \$83 to \$417 per month. Gavel maintains a zero-data-retention agreement with the AI providers it uses.

KNACKLY

[Knackly](https://www.knackly.com) is a cloud-based platform suited for practices with higher template complexity. It offers nested conditionals, repeating data, multi-document generation from a single intake, and an open API. Integrations include Clio Manage, Filevine, Curo365, NetDocuments, and OneDrive. It is particularly well regarded in estate planning, family law, and real estate practices.

DOXSERÁ

[Doxserá](https://www.doxsera.com) (from TheFormTool) is a Word-based document automation tool that runs inside Microsoft Word for Windows. It supports rule-based assembly generating multiple fully formatted documents from a single dataset,

with conditional logic and list management. Priced from \$129 per computer per year, it is among the most affordable options available.

LPMS-INTEGRATED OPTIONS

CLIO DRAFT

[Clio Draft](#) (formerly Lawyaw, acquired by Clio) is now Clio's primary document automation and AI drafting product. It allows users to convert existing Word or PDF templates into smart documents that pull data from Clio Manage, and includes AI-assisted drafting capabilities through Clio Duo. It is most powerful for Clio users and is well suited for firms that want automation and AI drafting from a single vendor. Pricing varies by Clio subscription tier.

SMOKEBALL

[Smokeball](#) is a practice management system with document assembly capabilities built in at a relatively sophisticated level for an LPMS. It includes a library of over 18,000 pre-loaded court and administrative forms, conditional logic, clause libraries, and bulk document assembly. It is particularly well suited for real estate and litigation practices with high document volume.

A NOTE ON HOTDOCS

HotDocs has long been the best-known document assembly platform in the legal market and remains in active use. It was acquired by Mitrtech in June 2024 and is now marketed as Mitrtech HotDocs. Mitrtech's focus is enterprise legal and compliance departments, and the platform has moved upmarket accordingly. Small and solo firms evaluating new tools should be aware of this repositioning and compare it carefully against the options listed above before assuming it is the right fit for their practice.

GETTING STARTED

The firms that implement document assembly successfully share a few common traits. They start with a single high-volume, high-repetition document type rather than trying to automate everything at once. They identify who will own template development and give that person adequate time to learn the platform and build well. And they build in a review process so that the first several dozen documents produced by a new template are checked carefully before the firm relies on the output without review.

A good starting point is to audit your last sixty days of documents and identify the five types you drafted most often. Pick the one with the most consistent structure and the most variables that currently require manual substitution. That is your first template.

Most vendors offer trial periods, demos, or onboarding support. Use them. The best way to evaluate a document assembly platform is to build one of your own templates in it and see whether the experience is intuitive enough that you, or whoever will maintain templates at your firm, can work with it without constant support.

Document assembly is not a new technology, but it remains one of the highest-return investments a small firm can make in its operations. The firms that use it well draft faster, make fewer errors, and free their attorneys to spend time on work that actually requires legal judgment. In a practice environment where AI is now also generating first drafts, the case for systematic template-driven automation is stronger than ever.