

IMPROVE EFFICIENCY WITH DOCUMENT AUTOMATION TOOLS

How many times have you tried to create a document in Microsoft® Word®, only to be annoyed at the lack of control you have over document fonts, paragraph formatting and page numbering, or any other manual adjustments needed to make your document look the way you want? Many industries, including legal organizations, scientific communities, and publishing, to name a few, produce complicated documents and most organizations find it necessary to purchase a template product to expedite and standardize document creation.

Microsoft Word (and the M365 Office¹ suite) is a document processing application widely used by businesses. However, Microsoft Word's basic document templates are structured in a manner that meets the needs of a wide number of users, but one size doesn't fit all. Microsoft Word works best when styles are used to format the document content, yet many people don't apply styles because they don't understand how to use them. Features like section breaks are necessary for complex documents that require different content in the header and footer, or pagination changes in different parts of the document. Unless you know how to take the necessary steps to make these alterations to your document it can be quite frustrating. And most of us don't have the time, or want to take the time, to perform laborious set-up which results in people taking short-cuts, poorly formatted documents that can lead to document corruption, and further repurposing of those not-so-healthy documents.



Templates By Design (TBD) is a document automation tool that works in conjunction with Microsoft Word to provide configured templates, style sets, and automation tools to make document creation a breeze! From custom correspondence templates configured with organizational branding, to complex forms designed for specific purposes, or practice-specific documents such as litigation pleadings or estate planning forms, TBD tools will help you construct your documents with ease.

How would you benefit from a document automation tool? Document creation should be as simple as typing the text on a blank page, but it's not. Below are a few frustrating components of Microsoft Word's new blank document template:

- Every Microsoft Word template is loaded with styles to be used for paragraph formatting. Yet, in Word's new blank document template, Heading styles are larger than normal font sizes, and they are blue in color. This might work fine for desktop publishing, if you are designing a newsletter or a marketing brochure, but this type of formatting isn't used in standard business documents, such as letters, pleadings, and agreements. Modifying the styles to suit your document needs is off-putting for those who don't have the time to do so, and often requires many steps to accomplish the task.

¹ Throughout this document Microsoft and Word, M365 and Office are mentioned, we acknowledge the copyrights for these products owned by Microsoft Corporation.

- Heading styles are used often with documents utilizing outline numbered paragraphs, and several Word features (e.g., navigation pane, TOC generator) rely on Heading styles for their automation. By default, Microsoft Word's Heading styles are not formatted with any type of outline numbering. If you want Heading styles to include outline numbering, you have to modify the styles to suit your needs for the various paragraph levels, and it's not as simple as you might think.
- Microsoft Word also provides **List styles** for general numbering (1,2,3) and bullets, but they include a spacing between the number or bullet and the paragraph text that is equal to .25 – many formal business documents require a .5 tab spacing, and if you modify one of Word's List styles to be anything other than .25, I have seen Word mysteriously change the tab settings back to the default .25! Not only is this frustrating, but not dependable.
- Since approximately Office 2010, the normal paragraph font in the new blank document template has been Calibri 11pt, and in future releases Microsoft could change their default font again. The document font can be modified if you know how to do it, either per document (but who wants to do this for every document?) or by modifying the Normal template, but this means some engineering must take place if you are not satisfied with the paragraph formatting out-of-the-box. As technology evolves, there are new fonts being introduced, but not all industries keep up with these. The older fonts were based on former typewriter settings (10 and 12 pitch, which translates to 12 or 10 points on computers, respectively). Calibri was chosen by Microsoft over a decade ago when the world began to recognize that more documents were electronic rather than printed on paper, and I assume Calibri 11pt (which comes with a nonstandard 1.15 line spacing) was considered easier on the eyes when reading on a computer or cell phone. The problem is that many document-heavy businesses are slow to adopt changes. For instance, many law firms are still using Times New Roman as their standard document font (which has been a preferred font since I started in the industry over 25 years ago) and some courts still require font type and font size standards for legal documents.
- Microsoft Word documents are designed like a book, with sections. A new document starts out with one section, and if you want anything to change as the document is constructed (e.g., different content in the header or footer on a certain page, or adjustments to page numbering or page orientation) you need to know how to insert breaks, disconnect one section from another, format the content for the new section, and so on. This is too much effort for some people.

What is the ROI with document automation?

Although many processes have been automated with software improvements, clients are demanding more value for their investment. You should ask yourself “how much time do I want to spend on creating a document, and how much of this is being passed on to my clients?” If keeping rates reasonable and enhancing client satisfaction is an important goal, you can leverage document automation technology to improve productivity, reducing the time it takes to prepare legal document sets, contracts, forms, and correspondence, reduce errors that can happen when you reproduce old documents to create new, and ensure that everyone is producing professional

documents with firm branding. Spending less hours on these time-consuming tasks allows law firms to spend time on other valuable business activities.

This is where TBD comes to the rescue!

How document automation tools can increase productivity and improve the document creation process:

- Sustain standardization established by the firm,
- Ensure consistent firm branding with document templates,
- Eliminate frustration during the document creation process,
- Reduce the time needed to generate documents,
- Built-in page and paragraph setup can ensure consistent layouts,
- Built-in styles can quickly provide desired formatting,
- Automated forms with boilerplate content expedites creation and reduces errors,
- Easy editing to suit individual preferences,
- Customizable template content,
- Integration with Microsoft Outlook[®] contact information,
- Easily compile document sets,
- Correct poorly constructed documents with document clean-up tools,
- Automated processes can quickly fix document issues.

Why Choose TBD?

- A. Easy, straightforward, and not overly designed.** The Microsoft Word ribbon offers access to frequently-used features; TBD will maintain that ease of use while adding helpful functionality.
- B. Two Products in One.** TBD combines a set of custom templates with legal-specific styles and outline numbering tools. In comparison, our competitors' software products sell their template package and their numbering tools separately. (A developer version of TBD is available separately).
- C. Built for all users.** Professionals, as well as staff, will find our template and automation tools easy to use, especially with the ability to designate author preferences and preserve personalized content.
- D. Templates and Databases.** Firms can manage their template environment day-to-day; trained Administrators can easily update database tables, add new forms and templates, and structure the library content. Super users from departments can manage their own content development. Alternately, the firm can contract with EPP to handle these tasks.

- E. **Training.** To get the most from your investment, TBD training helps your users understand how to incorporate our tools into daily work processes. We support your goals for knowledge, efficiency, and productivity. Quick Reference Materials and monthly tips and tricks are available. Contact EPP to receive user training and support.
- F. **As-Needed Support.** No required annual support commitments. Maintenance and support for TBD is available from Education Partners Plus on an “as needed” basis -- a policy that is very attractive to cost-conscious law firms. We are there when you need us.
- G. **Responsive Consulting and Development Services.** TBD is a configurable tool. We will work closely with your Administrators and decision makers on template design, custom configurations, and form development to meet your organizations specific needs. Although we provide basic templates, we encourage a firm’s input into template design and provide tools to assist in developing proprietary content.

A Demonstration of TBD Can Answer Your Questions

To see how **Templates By Design** can solve your document automation needs and to speak with a sales representative, call Education Partners Plus, 651-245-8612. Alternately, visit our website to request additional information or to request a call back. www.educationpartnersplus.com.