



A LAWYER'S GUIDE TO
**DOCUMENT AUTOMATION
AND BUILDING LEGAL
DOCUMENTS IN MS WORD**



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Lawyers juggle many projects every day, and drafting accounts for a big portion of that. They need to quickly produce clear, accurate, and consistent documents for various cases, send them over to clients for signature, and submit them to the court. Errors can be costly and can damage both reputation and credibility. If left unchecked, flaws can populate across different docs, costing more time to fix later. Sometimes, mistakes aren't even detected until they are submitted to the client or court.

But avoiding those mistakes can be a herculean task for firms that do this manually and work solo or with smaller teams.

36% of filings were rejected due to incorrect or missing information on the document or within the overall filing.*

Missing and incorrect information in documents was the top reason why courts rejected legal filings in 2021. And while the number has increased in recent years, it has always remained the main reason for document rejections. This doesn't mean that lawyers overlook proofreading, or that document review isn't a valued part of the routine. But between researching, client communication, billing, building up a case, and other related tasks, there just isn't enough time in the day to carefully examine projects.

The challenge of making time to proofread isn't new to the legal industry. Since before the pandemic, most lawyers have struggled to dedicate time to document inspection. In one survey, 33% of legal professionals admitted to skipping proofreading when creating legal papers. The obvious alternative is getting the drafting process right the first time. Minimizing manual intervention and utilizing free features within Microsoft Word to build dynamic, flexible, and accurate templates will help lawyers get past the top challenges within drafting. If employed smartly, these templates will maintain the formatting, consistency, and speed required to move this workflow faster.



In this eBook, we'll share how lawyers can use MS word efficiently to generate legal templates faster. We'll also share what automated templates are and what they do for your firm. Here's what we'll cover:

- **What is a legal template?**
- **The problem with manual drafting**
- **Tips to building better legal documents in MS Word**
- **The value of automated legal templates**
- **Types of legal documents**
- **Benefits of using automated templates**
- **Top features that make up advanced document automation**



I. What is a legal template?

For a single case, a lawyer has to produce various records, from court filings to briefs to affidavits and contracts. This is where templates can come in handy. They contain consistent document layouts, fonts, and style elements to meet a firm’s brand standards, and matter criteria, as well as court regulations. They often incorporate standardized wording, which must be customized based on client and matter details. Simply put, they provide the framework for lawyers to build detailed legal papers. Because legal documents have distinctive requirements and formats, templates become highly beneficial to simplify and speed up the drafting process.

Traditionally, firms created these manually by entering data and copy-pasting details to populate projects with client and case details. However, in recent years, firms have started automating this part of the legal workflow to achieve greater workflow accuracy, speed, and efficiency.

86% of law firms say that cloud-based legal technology improves client satisfaction. *-Legal Trends Report, 2022*

Automated templates drastically reduce data entry and errors resulting from repetitive typing. Many firms have mastered automated templates to complete routine drafting in just a few clicks. This fast-tracks the drafting process and allows them to onboard more clients and projects. While this enhances the customer experience by delivering projects faster, it also enables profitability and business growth initiatives with the extra time at hand.





II. The problem with manual drafting

The traditional approach to drafting legal documents was taking a similar record, copying the version, and then editing it with the client and case-specific details. The cumbersome process opens room for lapses like typos, consuming the firm's hours and money. Common drawbacks include:

Missing Details

While "Find and replace" is an excellent time-saver to automate text changes across the document, there will still be instances when it may not be most efficient to use, for example, in the text within a conditional logic section.

Incomplete Package

Depending on the case, a range of documents will need to be inserted into the package. Relying solely on your memory to know what to attach can be tricky. With document automation, you can depend on the software to understand what's required within the package and what's complete and ready for signature.


Outdated or Incorrect Versions

There is a chance you could be using an inaccurate or obsolete version of the legal template required by the court. Running a manual check to confirm its validity can be time-consuming and forgetting to do so can potentially result in rejection from the court. If you rely on online sources for your templates, there's also the risk of downloading a modified or outdated version which isn't acceptable anymore.

III. Tips to building better legal documents in MS Word

Using MS Word's free tools efficiently is critical to legal drafting. Knowing the ins and outs of it will make your job much easier. Here are some Microsoft Word features that will add more efficiency to a lawyer's routine:

1. Use basic text editing shortcuts



Cut

PC **CTRL** + **X**
ctrl

MAC **⌘** + **X**
command



Copy

PC **CTRL** + **C**
ctrl


MAC **⌘** + **C**
command



Paste

PC **CTRL** + **V**
ctrl

MAC **⌘** + **V**
command




Paste unformatted

PC **CTRL** + **↑** + **V**
ctrl shift

MAC **⌘** + **↑** + **V**
command shift


Pasting unformatted text can save time reformatting a cluttered doc in the future or even keep your lists from getting crushed by the newcomer style.



Undo

PC **CTRL** + **Z**
ctrl


MAC **⌘** + **Z**
command



Redo

PC **CTRL** + **Y**
ctrl


MAC **⌘** + **Y**
command



Save

PC **CTRL** + **S**
ctrl


MAC **⌘** + **S**
command



Paragraph

PC **ALT** + **2** + **0**
alt

MAC **⌘** + **6**
option



Section

PC **ALT** + **2** + **1**
alt

MAC **⌘** + **7**
option

Double-click: Select one word

Triple-click: Select a paragraph

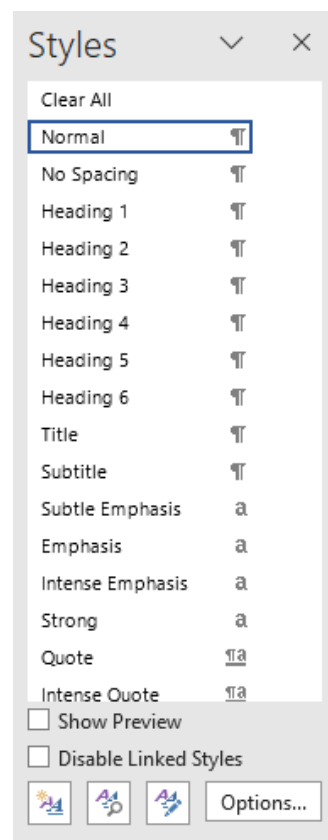
Find and replace: to replace all mentions of a specific term in a document with another term.

2. Try Word Styles

Documents with clean, consistent formatting reflect professionalism and attention to detail. But giving a messy document a meticulous makeover can be a tedious and time-consuming task. Word's Styles tool allows you to apply your desired formatting to the entire document quickly. All you have to do is determine what you want certain types of text to look like, and then, with one click, your document is coded in that exact style. Here are some Styles to consider:



- **Default Styles:** Word offers default styles and you choose whether or not they fit your business requirements. For example, Headings, font size, font type, paragraph spacing, line spacing, etc. will be set to a certain setting by default and if this fits your branding, you can easily use them.
- **Customized Styles:** Do you want all your documents designed with a specific font type, size, and headings style? It's simple to create styles. Simply click on the Styles Pane in the Styles tab, fill in your settings, create a name for the Style (e.g. Wills and Estate) and save. It's now ready to be populated whenever you like.
- **Adjust styles:** Have an existing style (default or custom) and want to modify it? Right-click on it in the Styles column and click Modify. From here you can easily make changes to existing Styles.



3. Create numbered lists

Start by setting up numbering templates. You can click on the list icons in the Home tab and choose from the list icons. The left option manages bulleted lists, the one in the center covers numbering, and the option on the right is for multilevel lists. Lawyers tend to use the right one most often. To customize the multilevel list, click on Multilevel List, and then Define New Multilevel List at the bottom of the popup. The screen with new list settings will pop up.



4. Track document changes

This feature allows you to record edits from different collaborators on a document. To turn on Track Changes, click on the Review tab and turn the Track Changes toggle on. If you can't switch it on, go to Review, select Restrict Editing, and then click Stop Protection to enable tracking. Remember to turn this feature on before editing the text, and make sure your colleagues do the same.

When turned on, Track Changes will mark deleted text with a strikethrough, and edits will show as underlined text. To change how updated text is displayed, click the Mark-up Options, go to Balloons and click Show All Revisions In-line. This will show all changes displayed as tabs. You can also hide changes from the Track Changes view by clicking Mark-up Options and selecting/deselecting any of the correction types (Comments, Insertions and Deletions, and Formatting). Keep in mind that the person receiving your edited copy will be able to see all your changes. In best practice, you (and any other document reviewers) should finalize edits and Accept or Reject changes before submitting any final version.

5. Remove sensitive metadata from documents

Avoid losing sensitive metadata by using Word's Document Inspector functionality. This is information that isn't written explicitly in the body of a doc but is still present and accessible through the file, for example, comments, editor's name, links, etc.

To see the metadata in your document, go to the File tab, click Info, and select Check for Issues. Then click on Inspect Document. Document Inspector will display all found metadata by categories. You can delete anything that you believe shouldn't be visible by the recipient.



6. Password-protect your documents

Enhance your attorney-client privilege by password-protecting your documents. Setting this up will keep information only between the intended parties, adding that extra layer of security and giving you peace of mind. Here's how to password protect your documents:

1. **Go to** the File tab
2. **Select** Info
3. **Select** Protect Document
4. **Click** the Encrypt with Password option

There's almost no limit to the features and things you can do to improve template design and document generation. You will discover more shortcuts and tricks as you continue working on the platform, but we hope these tips will help you get on this path to better and more enjoyable work.



IV. The value of automated legal templates

Preparing motions, appeals, agreements, contracts, and thousands of other legal documents contribute to countless hours of effort. The manual process is slow, tedious, and error-prone. Firms often start with a similar document from another client's file and use a copy/edit process to change details to match the case. If your law firm is still using a manual document creation process and experiencing delays, mistakes, and other challenges, it's time to consider document automation.

Automated legal templates simplify drafting by auto-populating data across sets of documents, so you don't type everything out or make constant edits. Depending on the platform you're using, details such as case numbers, client information, party names, etc. will be auto-filled by the software, saving you time and increasing your firm's productivity. Once automated, legal templates are easy to customize using advanced features like conditional logic to adjust pronouns and align subject-verb agreements.

Automation also brings the opportunity to attract talent to your firm. Many legal professionals have technical skills and want to help improve access to justice. However, they don't necessarily want to spend time drafting documents from scratch every time. In adopting these new and efficient technology solutions, there is an opportunity to make your firm more attractive to talent and clients.

With document automation software like Lawyaw, you can easily convert your existing MS Word-based documents into **customizable templates** and populate them with client and



matter details in seconds. From here, you can share them with your team for collaboration or directly with the client for e-signature, and then securely store the document in the cloud.

It's important to note that automated templates do not replace humans with a robot or machine, but rather empower legal professionals to enhance the quality and speed of their day-to-day work. Lawyers who embrace change do not see automation as a threat. Firms using the right technology can produce high-quality work in much less time without experiencing frustration or fatigue. There is a massive latent demand for legal services that cannot be realistically met by the traditional business model.

Client satisfaction, employee performance, and increased revenue were the top three benefits for firms using cloud-based legal solutions, according to the 2022 Legal Trends Report.

Client expectations have also gone up. As people become comfortable using technology for daily activities like online shopping, electronic payments, digital appointments, virtual meetings, etc., it makes sense to adjust your operations to accommodate those habits. Will your clients want to visit your office to sign papers, review document changes, and pay bills?

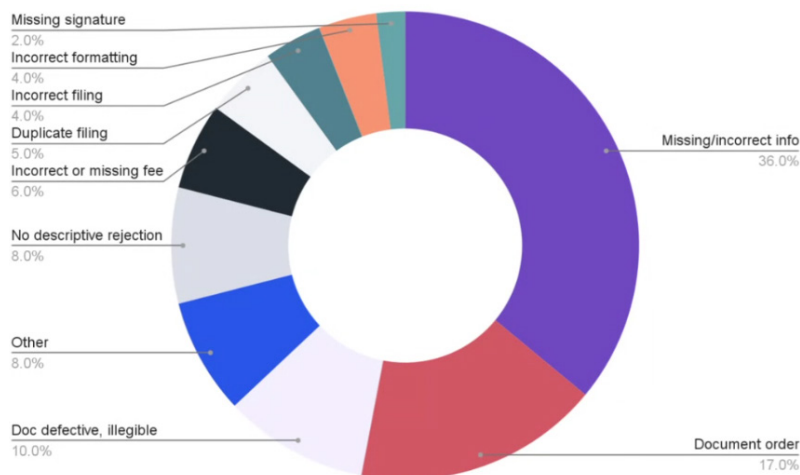
Let's keep in mind the value of a healthy work-life balance too. Lawyers are often overworked because admin work takes up a big chunk of their day. During the pandemic, the lawyer billed just 2.5 hours of an 8-hour workday, signaling that many firms struggle with inefficiencies that take time away from billable work. If you spend less time on administrative tasks, you will have more time to focus on billable work, leading to a healthier work-life balance and reduced stress levels. The end goal of automated tools is to free up more time that can be invested in high-focus or business growth initiatives like networking, CLE credits, marketing, or even pro bono work.

V. Types of legal documents

Before we jump into how to produce solid documents out of legal templates, let's take a step back and look at the type of documents lawyers use and the requirements from courts around them.

Typically, we have two types of documents—PDFs and DOCX. PDFs are primarily used to fill out court forms, and DOCX is used to prepare proprietary documents. PDFs are available on court websites and are free to download and use. Lawyers download these and fill them out with client and matter details. DOCX are editable Word documents, sometimes available on the court website, but mostly developed in-house or outsourced to a content publisher.

Top reasons for rejected documents



- 36% of legal docs are rejected because of missing or incorrect information.
- 17% of docs are in the wrong order.
- 10% are rejected due to doc defect or illegibility.





There are several reasons why courts reject forms or other documents—completing these repeatedly can be frustrating and a waste of time. That’s why it is crucial to understand the distinction between the two; what’s required in your jurisdiction; and when/how to use them. For example, PDFs can be mandatory to use in some jurisdictions versus others where they are optional or recommended. Understanding these details will help you complete projects faster and explain the process to your clients.





VI. Benefits of using automated templates

Saves Time

Based on 2022 legal research, lawyers work more than the typical 9-to-5 daily hours. About 56% of lawyers work beyond 5 pm, and an alarming 11% continue working after 10 pm. While some legal work requires expert intervention, such as research, tasks like drafting can benefit from automation. Automating documents enables you to create legal documents in minutes, freeing time to deliver more work and focus on value-adding tasks. This efficiency increases your realization rate and revenue for the firm. For example, if you charge \$500 to draft a set of documents that would previously take you 8 hours but now only takes 2 hours, you've increased your hourly billing rate by a huge margin.

Some lawyers report that using automation to generate documents results in time savings of **up to 83%**. This frees lawyers to work on more complex and valuable legal issues and sign new clients.



"I would literally go through the entire document and change everything, and then make sure it all corresponded with my notes. The issue with doing things manually is that you run the risk of slipping up and making a mistake. It doesn't look professional when you make those kind of errors."

Samuel E. Thomas | Law Office of Samuel E. Thomas | Athens, GA

Increases profitability

Alternative fee agreements are becoming widely popular within the legal industry. Document automation allows firms to take work that traditionally would have been billable-hour based and turn it into a fee agreement that best suits the project. This will enable firms to utilize their time efficiently to make more money and sign new clients. For example, if a client wants a lawyer to prepare his will, the firm can have it ready in an hour or less with automation, so it makes sense to charge a fixed fee. The fixed cost can be lower for the client's benefit, but the firm can still profit by serving more clients.



Reduce errors

Legal templates are a starting point for creating new legal documents for law firms, so it is critical that these remain updated and error-free. When you start each template from scratch, you risk inputting data inaccurately or omitting essential details. Plus, there's always the risk of sharing documents with clients without reviewing the complete package. In **one** survey, 33% of legal professionals admitted skipping proofreading when creating or reviewing legal documents.

With automated templates, you can quickly populate data across sets of documents instead of updating them one by one. As long as client and matter details are correctly entered into the system the first time, your templates will maintain accuracy, eliminating the need for proofreading. This saves the firm money and embarrassing mistakes.

It also ensures uniformity across all templates. You may set standards within the firm for creating documents for the organization. But you cannot be sure that the guidelines will always be followed. Automation maintains consistent branding across all templates, so it's ready to use for new and existing employees.

Enhances client experience

The speed of project delivery is closely aligned with accuracy. With automated legal documents, lawyers can design and share docs tailored to each client's requirements and specifications. If the software uses advanced features like conditional logic, you can easily customize the document with a few clicks. This can easily set you apart from your competition while saving both parties the time, confusion, and frustration caused by back-and-forth emails.

The actual return is when clients come back with bigger and more profitable matters, and your retention and referral rates and firm revenues increase.



Promotes knowledge building

The process of designing high-quality templates usually involves input from the best legal experts. Automation enables you to share these with junior staff or new employees so they, too, can serve clients with the same level of quality as your senior lawyers. And even if a drafter leaves the firm, you will have the internal knowledge to produce the necessary documents. Instead of reinventing the wheel every single time, your legal staff can gain access to smart automated templates and start generating documents in minutes.



VII. Top features that make up advanced document automation

Conditional logic

Legal documents require modifications beyond the standard details like name, address, and date, and that's where conditional logic comes in. It allows you to add if/then rules and conditions, like pronouns, to create reactionary automation. Once you've set your rules, it will automatically delete or insert text, sentences, and more based on specific case details, and populate within all corresponding documents.

The screenshot displays a legal document editor interface. On the left, a document template is shown with several conditional logic rules. The first rule is an 'If' condition: 'If Billing Information...' followed by a text block: 'Billing: The fee for representing you in this matter will be [Billing Information...] % of any sums recovered from [Opposing Party Full...].' This is followed by an 'End Billing Information...' tag. A second 'If' condition is shown: 'If Billing Information...' followed by a text block: 'Billing: An advance payment of fees in the amount of \$ [Billing Information...] is required. We will mail you a monthly bill detailing the work that was performed on your matter. These monthly bills will first be applied against the advance payment. When the advance payment is depleted, we expect that you will timely and consistently pay the monthly bills in full. Payment is expected within [Billing Information...] days of receiving the bill. In addition to the advance payment, there is a flat administrative fee of \$ [Billing Information...] payable immediately, representing administrative costs the firm incurs in opening a file, entering your data into firm calendaring and document control systems and drafting any initial documents. This flat fee is refundable only to the extent that this administrative work has not been performed at the time the attorney-client relationship is terminated.' This is followed by an 'End Billing Information...' tag. A third 'If' condition is shown: 'If Billing Information...' followed by a text block: 'Interest of [Billing Information...] % per year, non-compounded, is applied to all balanced not paid within [Billing Information...] days of billing.' This is followed by an 'End Billing Information...' tag. The final text block reads: 'In addition to paying for the legal services described above, you are responsible for paying or reimbursing out-of-pocket expenses related to your case. These may include things like.'

On the right side of the editor, a logic tree is visible. It starts with an 'AND' condition: 'Matter Information Limited Scope Representation by Proceeding DOES NOT EXIST'. Below this is a 'Billing Information Contin...' section with a '1' in a green box and an 'Apply' button. This is followed by an 'IF' condition: 'Billing Information Contingent Fee Percent EXISTS'. Below this is another 'Billing Information Retain...' section with a '1' in a blue box and an 'Apply' button. This is followed by another 'IF' condition: 'Billing Information Retainer Amount EXISTS'.





For example, with Lawyaw's advanced conditional logic, you can easily update personal pronouns (he/she/they) based on client information with conditions that automatically populate pronoun variations (him/her/them) throughout documents. You can also reuse the rules in other templates.

Form duplication

Save you and your team the trouble of recreating new packages for existing clients using document duplication. Lawyers often have to create similar documents for one client but only change minor details like name and date. For example, a client with four children wants to make his will. If you were to do this manually, you would have to build the form four times and type out the details of all four children one by one. With automation, you only create one copy, duplicate it three more times, and auto-populate their details into the document without leaving the drafting workflow.

E-signature

In the last few years, there's been an increase in the number of firms and clients embracing electronic signatures. Not only do they simplify and speed up the signing process, they also address a pressing need of the pandemic: the ability to collaborate over and sign documents remotely.

When researching a document automation platform, look for an e-signature tool that allows for easy sending and tracking. A robust software will automatically update you about pending and completed signatures. It will share mobile and web access for a smooth user experience, intuitively guiding you and your clients through the document for e-signature. Lawyaw comes with built-in e-signature features, which means you can draft your documents in the cloud and share directly with teammates and clients for signature.

Whether you are looking to transform your firm's existing MS Word documents into easy-to-fill, reusable templates, or quickly populate client data from our library of official state and USCIS forms, **Lawyaw can make it happen.**



Thousands of law firms across North America have generated a combined 10 million documents in Lawyaw. That's more than 833,000 work days' worth of manually cutting and pasting in Word docs saved by our users.

You may also be interested in:

Video Tutorial: Building a Solid Foundation in MS Word

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Reduce Time Spent on Routine Drafting by 80%

[Discover the solution](#)



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