



Streamlined Document Production At Hinshaw & Culbertson

September 2007
By Valerie Pickel

Like many other firms, Hinshaw & Culbertson, LLP has always been focused on enhancing user productivity and efficiency as a means of working not only smarter internally, but also, and ultimately, delivering a higher quality product to the firm's prestigious client base.

Based in Chicago, Hinshaw & Culbertson is an Amlaw 200 national law firm with more than 425 lawyers in 27 offices across 12 states coast-to-coast. The firm offers a full-service practice, with an emphasis in commercial and defense litigation, corporate, environmental, employment, health care and construction law, as well as the representation of professionals in their liability matters.

Evaluating Business Need

Law firms must produce documents ranging in difficulty from simple memos to complex agreements, as well as disclosure documents and briefs. Firms are often under the highest pressure with demands for both accuracy and turnaround. As a result, it is imperative that they produce well-formatted documents quickly and efficiently.

In order to maintain continual commitment to our clients, we completed a re-evaluation of the firm's document production and automation tools, and selected Esquire Innovation's iCreate template and macro software to help further automate and accelerate our document production process.

During the selection process, we paid a great deal of attention to the products' level of customization and flexibility. We knew the system would need to be extensively customized to fit our particular needs, since each office has its own styles and preferences, e.g., custom pleadings based on state-specific court requirements. In terms of ongoing business challenges with our old system, we were faced with an upgrade that did not provide easy access when offline. We needed a product that worked exactly the same in or out of the office.

Selecting iCreate

While the firm evaluated several different solutions, iCreate stood out above the rest based on ease of use, limitless customizability and a more intuitive interface compared to competitive products. Its centralized template launcher, advanced pleading administration, enhanced outline numbering toolbar and contact management integration provides robust capabilities for creating, editing and standardizing legal documents.

We purchased the program in 2005 and originally set up a small team to customize the application based on our needs.

The fact that it is nearly impossible to apply direct formatting is an added bonus. For example, the "Hyperparagraph" button actually modifies the style without applying direct formatting. We also found automatic numbering extremely easy to use. Being able to modify iCreate to fit our exact requirements allowed us to add various tools to assist with applying styles and numbering, letterhead that works electronically, and other MS Office-based templates.

'Real World' Efficiencies

Overall, the rollout of iCreate has saved us a great deal of money in down time from corrupt documents. Users are now applying styles confidently and in the correct way; the firm's documents are now much more stable as well. There are not as many Word crashes with iCreate, and training on iCreate is easier and saves the firm money as compared to training on previous systems.

Now fully integrated into our systems, everyone at the firm — attorneys, staff, secretaries and file clerks — relies on iCreate every day for everything from letters, memos, agreement templates, pleadings and all administrative forms, such as check requests or

leave forms.

iCreate offers an exceptional return on investment by streamlining the document production process and increasing staff productivity. When document collaboration occurs between multiple parties via networks or e-mail, documents created or edited with iCreate can be viewed and edited correctly by Word users, whether or not they use iCreate.

Why Use iCreate: A Snapshot

Designed specifically for the legal industry, iCreate enhances the use of templates and automation by providing firms with total ownership over template creation and macro development. We have found the package simple to administer, and the fact that the source code is open has greatly increased our ability to customize it. iCreate components can be purchased separately or as a complete package. Comprehensive configuration guides and training are offered to ensure a complete transfer of knowledge is achieved. Other key features and benefits we have found include:

- Standardized document production. Establishing standards reduces future time spent selecting styles and customizing templates.
- Simplified paragraph numbering.
- Integration with major document management and contact management systems to further automate the document production process. iCreate's QuickMerge uses existing contact information from Lotus Notes' address book.
- Simplified administration of templates and macros — a key benefit when rolling out such tools across large user communities at multiple locations.
- Full pleading suite.
- All firm Microsoft Office templates (Word, Excel and PowerPoint) are organized and contained within one dialog box. Templates from virtually any location and from any application can be launched directly from the iCreate Template Launcher.
- The program's iCalendar allows the user to retrieve schedule information from an Outlook calendar and insert it into a clean table in Microsoft Word. This is perfect for consolidating multiple calendars/ authors into one table, specifying calendar format, inserting schedule information directly into an existing document or making it a new document, selecting start and end dates, and filtering by category.
- Ease of customization. For example, the "iHyperstyles Toolbar" easily creates and modifies outline numbering and styles, allowing the firm to create numbering schemes and save them for use on all documents, apply heading styles quickly by using shortcut keys or intuitive buttons, and simplify creation and updating of Table of Contents.

Seven Tips for a Highly Successful iCreate Roll-Out

Based on our firm's extensive and continual experience with introducing and implementing iCreate to our large and geographically disbursed staff, we have compiled several "lessons learned" for successful software rollouts. They include:

- 1. Listen to user needs.** Add styles that people want — titles, underlining, and new toolbars that aid in easily applying styles.
- 2. Ease of use.** Make it easy to use and easy to get to.
- 3. Customization.** Build and customize applications that work the way your users work. The code is open, so changes can be made easily.
- 4. Training.** Our secretaries received one day of training. All training was onsite and follow-up training on specific features was made available via Webex. We generally spent seven business days training in each office, including review sessions for all training groups.
- 5. Change management.** Understand the need and what is wrong with the old application. Manage resistance from users who are afraid of being less efficient while switching to new software.
- 6. Integration.** Integration with other applications such as Lotus Notes and firm document management systems is critical to achieve the goal of 100% user adoption.
- 7. Single point of entry for information.** Our ongoing goal is to get as much of the work product into the iCreate template launcher so users can find what they need in one place.

Valerie Pickel is the Training and Application Support Manager for Hinshaw & Culbertson LLP. Ms. Pickel, who has been with the

firm for 11 years, was instrumental in evaluating production tools and using iCreate to design state-specific templates and macros from scratch.

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