



FAST FACTS

Company:

Loeb & Loeb LLP represents multi-national Fortune 100 companies in mid-market transactions and litigation matters, and serves as primary outside counsel to diverse clients ranging from start-ups to high net worth individuals and families.

Industry:

Legal

Geography:

Headquartered in Los Angeles
5 offices in the U.S.
2 offices in China

Challenge:

Finding a suitable template, macro, and numbering solution software package that best integrates with Windows 7/Office 2010

Product Solutions and Services:

- PayneGroup Metadata Assistant
- PayneGroup Forms Assistant
- PayneGroup Numbering Assistant
- PayneGroup Master Series Class

Results:

Successful migration to Windows 7/Office 2010 and integrated solutions

Loeb Users Love PayneGroup's Forms, Numbering, and Metadata Assistants

COMPANY

Headquartered in Los Angeles, Loeb & Loeb LLP has between 700-800 total users, 375 of them attorneys, located across five offices in the U.S. and two offices in China. The firm represents multi-national Fortune 100 companies in mid-market transactions and litigation matters, and serves as primary outside counsel to diverse clients ranging from start-ups to high net worth individuals and families.

The firm stays abreast of all advances in legal technology that will increase productivity, make jobs easier, and perform well based on the firm's needs. We bought Metadata Assistant from PayneGroup in September 2009, which removes embedded confidential information from documents before they are emailed or routed externally. It has always been a solid performer which works well for the firm.

CHALLENGE

In 2010, Loeb & Loeb was planning to upgrade our computer environment from XP/Office 2003 to Windows7/Office 2010. With Word 2003, the firm was using Microsystems D3 (Dynamic Document Drafting) to generate our form documents, apply numbering and generate TOC. However, in 2009 Microsoft lost an infringement case that directly impacted the technology that D3 was built upon. We realized that D3 was no longer going to be supported in Word 2010 and beyond, so we knew we had to make a change.

EVALUATING THE POSSIBILITIES

To help us decide on a replacement for D3, we formed an evaluation group of 70 users comprised of attorneys, paralegals, and assistants to evaluate four different companies with reputable template products. The companies included PayneGroup's Forms Assistant and Numbering Assistant, The Sackett Group's Legal MacPac, various products from Esquire Innovations, and Litera's Innova.

Based on the evaluation group's feedback, we narrowed the choice down to two finalists: PayneGroup and The Sackett Group, which were tied in numeric ratings. To break the tie, we looked at the write-in comments from the users. The comments about

Loeb Users Love PayneGroup's Forms, Numbering, and Metadata Assistants

"I adore the folks at PayneGroup and they are always available to jump on any question or issue that arises. We are looking forward to our ongoing relationship, because PayneGroup is truly a great company and their software has been a wonderful asset for our firm." – Heather Morrow, Loeb & Loeb

PayneGroup repeatedly used the word "love" about Forms and Numbering Assistant, whereas the Sackett comments more often used the word "like" and no one used the word "love." The "loves" –and Payne – won out, so in October 2010, Loeb & Loeb purchased Forms Assistant, a template based document automation utility designed to quickly create letters, memos, faxes, agreements, and pleadings, and Numbering Assistant, a paragraph numbering utility that allows you to quickly add, modify, and update automatic multi-level numbering schemes in Word documents and generate tables of contents.

THE IMPLEMENTATION PROCESS

Once Loeb & Loeb decided to purchase Forms Assistant and Numbering Assistant, we needed about six months to get a pilot group up and running, because these software implementations hinged on our upgrade to Office 2010 and Windows 7. During that half-year, PayneGroup worked closely with our firm to develop customized templates and an entirely new working environment in Windows 7.

PayneGroup conducted a Master Class training on Microsoft Word for a small group of IT trainers and Help Desk staff, including myself. In addition to focusing on new Word 2010 features and functionality, these sessions also covered Word default settings and what the firm could change to make the Word environment more user-friendly.

From the beginning, we felt that the PayneGroup software was very intuitive and eased the burden for both our users and the Help Desk. Tasks that previously took a several steps could now be easily done in just one. First, we focused on priorities templates, such as the firm letterhead and pleadings, and then expanded out to more specific vertical needs.

Once a user understands Payne's basics, such as generating envelopes from a letter, modifying a numbering scheme, and generating a Table of Contents, all of this work can all be done more efficiently. We were even able to bring forward some code written in-house and add a custom button on the Pleading Assistant ribbon to generate Interrogatory Sets.

After our letterhead and foundational templates were in place and the upgrade rollout complete, one of the major projects Payne undertook was specific to our Intellectual Property practice group. Our trademark group had built over 100 forms within D3 and we needed to recreate that functionality with Forms Assistant. We saved those legacy forms into our iManage document management system to preserve them and then had to determine how to rebuild them in Forms Assistant. Payne's developers were able to design two of the more complicated forms. They wrote code to query and pull information directly from CPI, our Patent and Trademark database, and then

Loeb Users Love PayneGroup's Forms, Numbering, and Metadata Assistants

“We have found the PayneGroup to be great to work with and extremely responsive.” – Heather Morrow, Loeb & Loeb

added content controls and an extra input form to Forms Assistant to facilitate all the functionality needed. Once this was completed, I was able to recreate the remaining 98 forms in Forms Assistant.

USING THE SOFTWARE

Loeb's users only needed about two weeks to feel comfortable with the new desktop environment, which also included a switch from Office 2003 to 2010, as well as learning Forms and Numbering Assistants. In fact, all subsequent updates to the templates since that initial rollout have gone smoothly.

Using Numbering Assistant, we have been able to easily modify numbering schemes in existing documents and restructure the forms to make generating a TOC easier.

Additionally, we have found that using Style Separators rather than manually marking the TOC entries has resulted in substantial time savings, especially for our Corporate and Trust & Estates departments.

Another popular feature with Forms Assistant are Smart Blocks. This feature allows individuals to save blocks of reusable text, such as scanned signatures, graphics, text, and content for many types of documents.

We have found the PayneGroup to be great to work with and extremely responsive. As an example, recently our Hong Kong office graphics in the template needed to be

changed, and Payne turned the new templates around within 24 hours, so we were able to convert and train the Hong Kong users as scheduled.

RESULTS

With Forms, Numbering and Metadata Assistants, PayneGroup has provided Loeb & Loeb LLP with easy-to-use package of software that intuitively assists our users. These applications have immensely improved our productivity. I adore the folks at PayneGroup and they are always available to jump on any question or issue that arises. We are looking forward to our ongoing relationship because PayneGroup is truly a great company and their software has been a wonderful asset for our firm.

ABOUT THE AUTHOR



Heather Morrow is the Senior Learning Coordinator and Courseware Developer at Loeb & Loeb LLP and is based in the firm's Los Angeles office. Ms. Morrow is a published author who has worked in the legal industry for 17 years. Loeb & Loeb LLP is a national law firm with 375 attorneys and has seven offices located in Los Angeles, New York, Chicago, Nashville, Washington D.C., Beijing, and Hong Kong. Heather can be reached at hmorrow@loeb.com.