



The Tipping Point for Document Automation: McDonald Carano

Contract Express® Case Study

The intelligence, technology and human expertise
you need to find trusted answers.



the answer company
THOMSON REUTERS®

The Firm

McDonald Carano has shaped the Nevada legal landscape for nearly 70 years, with more than 50 lawyers practising in Las Vegas and Reno. The firm advises a selection of Fortune 250 industrial and service corporations, Fortune 500 companies, financial and governmental institutions, fast-growth and mid-market companies, entrepreneurs, start-up ventures, and non-profit organizations.

Entrepreneurial thinking is at the heart of the firm's commercial law practice while creativity makes up its institutional DNA.

The Problem

Like many law firms, McDonald Carano had been circling the idea of document automation for years. The firm embraces the use of technology but wasn't sold on the available automation products.

Since document automation technology first emerged in the late 1980s, every generation of commercial products has extended the functionality and improved on its predecessors. The issue, however, was that too much complexity remained in the implementation and initial automation processes.

The driver for adoption at McDonald Carano has always been the ability to standardize the firm's work product. Lawyers in the firm's trust practice had a particular drafting style and set of documents they liked to start from for different matters. As a result, the firm didn't have any standard estate-planning forms, for example, making version control a consistent problem.

The Catalyst

When McDonald Carano acquired another firm with its own estate-planning templates, complexity and inconsistency became an even greater issue.

"Now we had four to five groups, with each doing its own thing," said Rob Sawyer, IT Director at McDonald Carano. Sawyer determines the firm's technology initiatives and budgets, creates or advises on technology policies and best practices, and oversees implementation of new initiatives, including automation.

The acquisition of the second firm took version control from difficult to impossible under current processes. Copy-and-pasting in an attempt to meld the different packages together led to issues with numbering, styles, consistency, and more. Documents increasingly became corrupted.

The Barrier

Sawyer knew the firm had to implement an immediate solution because of the extra pain points resulting from the merger. Additionally, the firm was moving cautiously because of concerns with document automation solutions such as HotDocs.

The firm looked at HotDocs seriously many times over 15 years, but was nervous about proceeding because of how complicated it seemed. Sawyer thought he would need to dedicate more IT resources to the project or pay HotDocs for template automation, which could be extremely expensive. It wasn't unheard of for some vendors to charge clients for 50 to 100 hours of work per template.

"Pagination was a pain. Attorneys were stuck on the document preparation phase instead of working on the substance."

— Rob Sawyer, IT Director,
McDonald Carano

The Tipping Point

Sawyer hadn't heard of Contract Express until after it was acquired by Thomson Reuters. After he reluctantly agreed to a demo, Sawyer quickly saw how a template could be automated in 15 minutes.

"Unlike HotDocs, where you had to diagram things out, with Contract Express you just started in MS Word," said Sawyer. "It seemed like a really organic workflow. It also seemed like something lawyers could handle, instead of having to rely on programmers.

"The firm signed up for a trial and, with about half an hour of training, attempted to automate something really complicated – a married-trust template package. I thought that if Contract Express could handle that, it could handle anything," added Sawyer.

Had McDonald Carano not had an opportunity to do a trial run of Contract Express, it may have never agreed to use it. The trust template package contained as many as 15 documents, including wills, trusts, schedules, bills of sale, general assignments, and powers of attorney. While the process of automating all of those documents took several months to complete, Contract Express sped up the process considerably. Many of the simpler documents were finished in minutes, whereas it would have taken HotDocs two to three hours to accomplish the same task.

"I really liked how one questionnaire could drive creation of the entire package. The top template decision of which documents to create is critical to driving efficiency. It could otherwise take a secretary four hours to cobble together the templates and find and replace all the names," said Sawyer.

The Rollout

The firm focused on a rollout that would last.

"We held multiple meetings with as many of the estate planning attorneys as possible to demonstrate the software and get their feedback on the templates that should be automated within the program," Sawyer said. "We followed up with live training sessions. We also identified and encouraged a couple of attorneys early on who were eager to use the program, with the idea that they would spread enthusiasm for the technology. User adoption is always an ongoing process."

Lawyers sharing their personal experiences and success with the software is critical in getting peers to adopt the software, too.

"Attorneys who have used Contract Express to quickly assemble a trust package have reported how much quicker it is compared to manual assembly," said Sawyer.

The Bonus

Moreover, Contract Express uses intelligent reasoning in its questionnaire to drive amendments through organic languages. For example, a question posed on the questionnaire asks, "Is the estate likely to exceed federal exemption?" If the answer was yes, Contract Express inserted new clauses throughout the package. The ability for Contract Express to fully automate and populate that answer throughout the package showed how a major change was controlled by just one answer.

The firm uses Contract Express for estate planning documents, primarily trusts and wills. Its success means the firm's lawyers are hoping to expand to other practice groups, such as corporate law. And while Contract Express provides obvious benefits for transactional lawyers, the firm believes that certain litigation documents could be automated, particularly in areas such as workers' compensation and employment law.

McDonald Carano is also exploring the possibility of offering the use of Contract Express to current and potential clients.

"Once you have the variables in place, it's easy to build the questions and produce the document," Sawyer says.

The Recipe for Success

Sawyer offered two tips for future adopters seeking to benefit from Contract Express.

1. "Make sure to train a mix of legal secretaries and IT staff so that they can collaborate on projects together. Contract Express is intuitive enough that non-tech-savvy staff members can program templates and questionnaires, but some projects may require IT expertise to complete."
2. "Try to identify the top 10 documents you want to automate from the outset. These are the documents that will give you the most bang for the buck. Let one person handle the automation, then have several people perform quality control and provide feedback on the documents before rolling them out to the firm."

It's important to communicate a strong success story throughout the firm, because McDonald Carano always focuses on its clients and they expect results.

"Our clients do not want us reinventing the wheel every time we take on a new project. We owe it to them to explore technological means to make the firm more productive and efficient," said Sawyer.

"Contract Express was so fast, easy, and user friendly. That's why we fell in love with it and abandoned HotDocs immediately."

— Rob Sawyer, IT Director,
McDonald Carano



Rob Sawyer

Discover why Thomson Reuters Contract Express is preferred by enterprise law firms and global corporations for their document assembly needs.

www.contractexpress.com

