



## *Streamlining Document Creation and Assembly Using the Microsoft Office System*

**When preparing client deliverables, professional services workers often need to retrieve information from disparate line-of-business systems such as document management, contacts, and legal research systems. They might spend hours navigating to and switching among these different systems, searching for information, manually consolidating information, and often still not find the most current content. A document creation and assembly solution can help professional services organizations streamline document creation, improve the quality of deliverables, ensure the use of up-to-date-content, and increase employee productivity.**



### **The Document Creation and Assembly Challenge**

Law firms and other document-intensive organizations face considerable challenges when creating documents and managing their content. For example, content is often located in disparate systems and is difficult to access. Document authors must navigate a dizzying number of applications and dialog boxes when creating documents. And bringing new employees up-to-speed on document creation workflow can be time-consuming.

Specifically, large professional services organizations might experience the following challenges when creating and assembling documents:

- Accessing the organization's existing content is difficult and results in limited reuse
- Incorporating data from line-of-business systems into documents is manual and error-prone
- Identifying and enabling content for reuse is too complex and results in limited available content

### **Streamlining Document Creation and Assembly Using the Microsoft Office System**

A document creation and assembly solution built on the Microsoft® Office System can improve productivity and reduce errors by enabling content reuse, streamlining document assembly, and optimizing content capture processes. With dynamic document assembly, a legal organization can also improve quality of deliverables, and broaden scope of content available for reuse. And because an Office-based solution uses

Word, Outlook®, and other applications familiar to end-users, the costs associated with implementation, training, and adoption are low.

### **Enable Content Reuse**

Search published document content and line-of-business content, and generate documents from the corporate knowledge base:

- Easy access to content from within preferred desktop applications increases lawyer productivity
- Searchable knowledge-base of content ensures reuse of best information
- Familiar productivity tools and user-specified categorization of content increase end-user adoption and reduce training costs

### **Streamline Document Assembly**

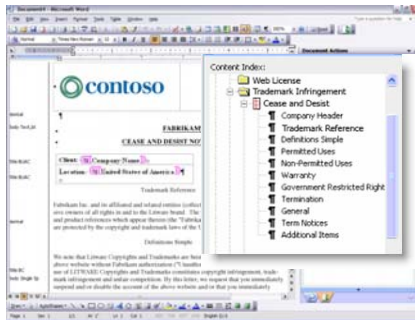
Incorporate customer data or other content from line-of-business systems with a few simple clicks:

- Incorporating current and reliable content from existing systems improves the quality of deliverables
- Professional workers save time by retrieving information without having to navigate across applications
- Risks associated with disparate document creation approaches and content re-creation are reduced

### **Optimize Content Capture**

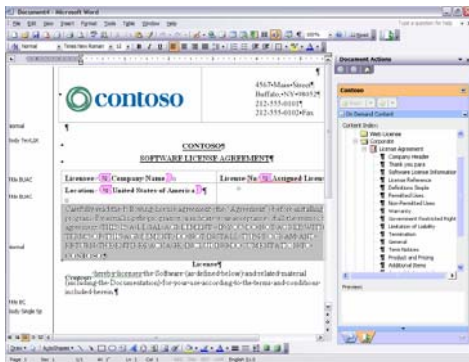
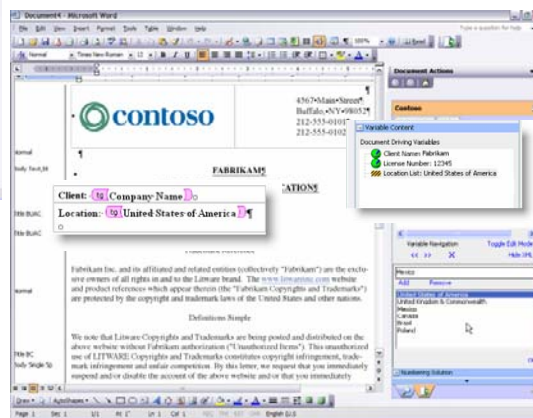
Content capture is optimized with administrative tools that simplify content harvesting and publication:

- Automated processes enable information workers to make content available for reuse without the help of an administrator



Save time by defining variable content and auto-updating key fields throughout the document

Access existing document content and other line-of-business content without leaving Microsoft Word.



Individual users can highlight, tag, and submit content snippets for future reuse

- Empowering professional workers to save content broadens scope of content available for reuse
- Streamlined processes for content review and posting reduce administrative overhead costs and facilitates compliance with changing legal standards

### Benefits of a Document Creation and Assembly Solution

A document creation and assembly solution based on the Microsoft Office System, enables professional services organizations to realize the following benefits:

- Easier access to content from within familiar tools increases worker productivity

- Incorporating current and reliable content from existing systems improves the quality of deliverables
- Searchable knowledge-base of content ensures reuse of best information
- Advanced formatting tools save time and assure consistency across the firm's deliverables
- Automated processes leverage a firm's intellectual capital by facilitating content capture and reuse
- Streamlined processes for content review and posting reduce administrative overhead costs and facilitate compliance with changing legal standards

### The Microsoft Advantage

As one of the largest technology providers in the world, Microsoft is uniquely qualified to deliver solutions that address the business challenges of professional services organizations.

- **Leverages Familiar Tools** Document creation and assembly solutions based on the Microsoft Office System are built on the easy-to-use, accepted foundation of Microsoft Office and Microsoft SharePoint® Products and Technologies.
- **Extends Existing Investments** Many companies have invested millions of

dollars in key line-of-business systems, as well as existing Microsoft software. Microsoft's approach to help organizations extend those existing investments rather than create new "silos" of applications and data.

- **Uses Existing IT Skills** Because document creation and assembly solutions are built on familiar Microsoft technologies, existing IT organizations likely have the skill sets ready and capable of supporting these new applications.
- **Provides Broad Partner Ecosystem Support** Microsoft is supported by over 300,000 partners worldwide, so professional services firm executives and IT departments will find professional resources that are skilled in the industry needs and current on the key technology capabilities from Microsoft.

### Next Steps

To learn more about document creation and assembly solutions built using the Microsoft Office System visit:

[www.microsoft.com/office/showcase/doccreation](http://www.microsoft.com/office/showcase/doccreation)

### Solution Showcase for the Microsoft Office System

Document creation and assembly is one of the many business scenarios available in the Solution Showcase for the Microsoft Office System. The Solution Showcase highlights examples of how leading organizations can solve business problems using the Microsoft Office System. The Solution Showcase provides guidance so Microsoft customers can obtain more value from their investments in the Microsoft Office System, and provides a featured listing of Microsoft partners who can help customers design, build, and implement Microsoft Office-based solutions.

For more information about the Solution Showcase, see:

[www.microsoft.com/office/showcase](http://www.microsoft.com/office/showcase)