



## A CONVERSATION ABOUT BEST PRACTICES WITH DIANE POWER AND SUSAN POSTERRO OF GADSBY HANNAH LLP

Recently, *The Edge* had an opportunity to sit down with **Diane Power**, Chief Information Officer and **Susan Posterro**, Office Automation Coordinator of **Gadsby Hannah LLP** in Boston, to discuss the firm's recent Best Practices Initiative. This major initiative, spearheaded by Posterro, included implementing SoftWise NumberingSuite, customizing firm Styles, training all users on the proper use of Word Styles, and giving users Microsystems tools to help in the cleanup and styling process of documents. The firm hired Overall Domain Concepts, LLP to assist with their efforts.



Why a Best Practices Initiative? Power explained that the firm recognized that too much time was being spent by users “fighting” with documents, reformatting others’ mistakes. In addition, Posterro noted that IT was spending a great deal of time supporting these dysfunctional documents, and as with any business, time is money. Another goal of the Best Practices project was to ensure consistency in formatting of documents, because in today’s world, more and more documents are electronic work product, and can be judged by others outside the firm. “I look at document production as our work product. We need to streamline our production process,” said Power.

See [Gadsby](#), p.2

## ALL ABOUT PDF

Most everyone is familiar with PDF files, but if you're not, you should be. PDF – short for Portable Document Format – was originally developed by Adobe Systems as a unique file format to be viewed with an Adobe viewer on any other computer or platform. To view or print PDF files, users need nothing more than Acrobat Reader, which is distributed by Adobe Systems free of charge.

What many people are confused about is why or how to use PDFs to their best advantage. *The Edge* did a little research to give you the lowdown on the best reasons to use PDFs in the coming year:

See [PDF](#), p.3

## MICROSYSTEMS CLEANING THE WAY

By **Brian Hall of Microsystems**

Microsystems is the acknowledged leader in software-based document formatting and clean-up solutions for the legal market. Its Knowledge Partnership program provides more than 160 law firms globally (including Gadsby Hannah) with an innovative combination of software products, consulting services, and knowledge transfer sessions designed to improve the total document structuring and production processes.

Its software allows Word Processing centers, Help Desks, Legal Secretaries, Attorneys and the IT groups that support them turn problem documents that inevitably arise out of collaboration into healthy documents.

See [Cleanup](#), p.4



GADSBY, CONTINUED FROM P. 1

This was not Gadsby’s first attempt to encourage their users to embrace consistency through using Styles. When asked why they felt earlier attempts to use Styles failed, Posterro felt this was a much larger undertaking than they initially thought. “There were many pieces and logistics in what to roll out when, scheduling the training and scheduling the support to ensure we met our goals.”

Several other factors probably contributed to the firm’s inability to “catch on” to Styles in previous attempts. While the Firm has always used Microsoft Word, earlier versions weren’t as problematic as Word XP. “We did not design any custom Gadsby Styles until we broke the project down and focused solely on the creation and training of customized Styles,” said Posterro. As most Word users can attest, the Styles that come with Word ‘out of the box’ are rarely useful for typical legal documents. Posterro also agreed that they probably trained too much at one time, trying to incorporate Styles into an entire system conversion.

Posterro feels that there were a number of key factors to the success the firm experienced this September:

**Gaining top-down commitment within the firm.**

This included presenting a demonstration to the attorneys of how a “best practices” initiative would impact the firm in terms of cost savings, reduced turnaround time on attorney work product, and more professional-looking documents to the outside world.

**Hiring the right consultants.** A priority for Posterro was to meet with different training companies and interview the potential trainers who would be working with the users to ensure whoever they hired would be a

good ‘fit’ for the firm. The consultants were able to share knowledge of other successful implementations, and provide guidance at each step of the project. Throughout the project, Posterro had close communication with the trainers to continually monitor progress.

**Understanding the nature of the documents.**

With the guidance of their consultants, the firm created a “Lead Team” of users to assist with analyzing documents, understanding the needs of different practice groups. The Lead Team played an important role in communicating user concerns throughout the project, and helped all users to feel part of the process right from the beginning.

**Sufficient training and support.**

Posterro stressed the role of mandatory training for everyone, along with the right tools – both in the form of Microsystems products, and one-on-one floor support after training – in making Gadsby’s project a success this time around. Training was conducted in four ‘tiers’ – enabling users to master one step of the process before being required to learn another. Users were also given homework at the end of each class, which helped them solidify the knowledge they had gained in class.

As any IT or Training Manager well knows, encouraging users to come to training is often the hardest part of any rollout. While Gadsby made

their training mandatory, Posterro also ensured that it was comfortable and fun for everyone. All sessions included a meal or a snack, depending on the time of day, and attendees received various favors at each session, which ranged from a book on dealing with change – *Who Moved My Cheese?* – to a ‘doctor’s bag’ filled with candy, mints, aspirin, pens and paper. Those small details, which were the brainstorm of Posterro herself, made a tremendous difference in the overall perception of the project by the users.

See [Gadsby, p.4](#)

*“The new GH Styles class I attended yesterday was excellent...the new GH styles will make styling documents go much quicker.” Gadsby Hannah secretary*

*“This is helpful. I have been tremendously pleased with the various ways the technology here has made my transition back to a firm easier.” Gadsby Hannah attorney*

*“This document was scanned from the text of a meeting and required clean-up in WP...(t)he document is perfectly styled and numbered so that when it came to make fairly extensive changes, it was a breeze to edit...THANKS!” Gadsby Hannah secretary*



## PDF, CONTINUED FROM P. 1

- ✓ Any file that is created as a PDF can be viewed by another regardless of the originating software application.
- ✓ Document Security – PDF files can be password protected to allow viewing and editing of the file. You can also protect the file from being copied and printed.
- ✓ Digital Signatures – With Adobe Acrobat you can digitally sign documents for authentication and legal purposes. Once a user digitally signs the document, other users can verify that the signature is valid. The signature will also validate the integrity of the document and that it has not been altered once signed.
- ✓ Many government and business forms such as IRS forms, passport forms, and UCC forms have been created in Acrobat and allow the user to fill out, save and print completed forms.
- ✓ With the new Case Management/ Electronic Case Files (CM/ECF), both the U.S. Bankruptcy and U.S. District Courts in Massachusetts allow attorneys to electronically file and view court documents over the Internet. These courts only accept files that are formatted as PDF.

So how should you get started with PDFs? While the most common method still is using the Adobe Acrobat software, other choices are out there, including new copiers and scanners that have the ability to scan documents directly into a PDF format.

Note that the creation method used will dictate what can be done with the PDF. For example, some PDFs may simply be an image that can be viewed and printed, but with the right software users can create a form-fill type document, or a document that can be edited and collaborated on by many users. Be sure to explore all the options before purchasing new hardware or software.

If you already have Adobe Acrobat and would like to learn more about using PDFs to the fullest, call ODC to schedule flexible training classes: (617) 965-6013 or [sevans@odcllc.net](mailto:sevans@odcllc.net).

## ESQUIRE INNOVATIONS BREAKFAST

In December, ODC and Esquire Innovations, Inc. co-hosted an informational breakfast seminar on **Document Automation for Law Firms** at Goodwin Procter, LLP, which was attended by several Boston-area law firms.

Craig Keller, CEO of Esquire Innovations discussed document automation for law firms and previewed the Esquire suite of products – iCreate, iRedline, and iScrub.

If you missed the breakfast and are interested in learning more about the Esquire products, contact Susan Evans at 617-965-6013, or by e-mail at [sevans@odcllc.net](mailto:sevans@odcllc.net).

## IN THE WORKS:

### WORD 2003 SKILLS FOR TUTORPRO

ODC consultants are currently working in partnership with TutorPro, Ltd. to develop legal-based skills for Word 2003. If you would be interested in learning more about TutorPro, check out their website at [www.tutorpro.com](http://www.tutorpro.com), or call ODC to schedule a demo of the product.

## EXTRA! EXTRA!

### THE EDGE REACHES 500

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### QUOTE OF THE DAY

'Computers are useless. They can only give you answers.'

- Pablo Picasso



## GADSBY, CONTINUED FROM P.2

Another incentive for attending training, and using the tools after training, is the fact that from now on documents must be properly 'styled' in order to be accepted into Word Processing for additional support.

While all of this may seem like a lot of effort, Power stressed that it has been well worth it; the benefits to the firm are already tangible. As Posterro explained, "Secretaries say that cleaning a document is fun and both the attorneys and the secretaries enjoy styling their documents." More importantly, the turnaround time on documents has been greatly reduced, and users are experiencing much less frustration in dealing with poorly formatted documents, because they now are empowered to fix any problems they encounter, and create good, clean documents themselves. Posterro has also noted a drastic reduction in support calls, which frees the IT staff to work on other projects. And as most IT folks will probably agree, gaining time is the biggest benefit of all.

## CLEANUP, CONTINUED FROM P.1

Microsystems' document support model is unique. Via its Document Emergency Room service, a client can send us a problem document from 9:00am to 9:00pm eastern time, Monday through Friday. Within two hours, the company's Solutions Center typically returns that document with the problem identified and fixed, accompanied by a report that details this information so that the client is better prepared to tackle the problem internally if and when it next occurs. The Document Emergency Room service is included as part of Knowledge Partnership.

Microsystems also supplies document conversion and migration services; its products have migrated over 300 million documents for more than 400 law organizations worldwide.

*Brian Hall is Vice President, Knowledge Partnership & Marketing for Microsystems. Our thanks to him for contributing to The Edge and for his help in building the ODC / Microsystems partnership.*

## ASK OLIVIA

**Dear Olivia,**

***I have a lot of trouble when selecting large amounts of text in Word with the mouse: I click and drag, but the page moves too fast and I miss my target...then I try to move back and it goes too fast in the other direction. HELP!***

**Signed, Mousephobic**

Dear Mousephobic,

Stop hating your mouse...here's a great tip for selecting a specific range of text, especially a large area: Click to place the cursor at the beginning of the text. Then, using your scroll bar to get to the bottom of the text area. Press Shift+click at the end, and the entire range will be selected.

Bonus: You can use this tip to select a range of cells in Excel as well!

**Dear Olivia,**

***Do you have any cool tips for Excel?***

**Signed, Excelophile**

Dear Excelophile,

Here's my favorite little-known tip in Excel:

Ever want to add up some numbers, or count a list in your spreadsheet without writing a formula? Well, you can. Move your mouse down to the status bar at the bottom of the spreadsheet, and right-click on the gray area below the scroll bar. You'll see options for displaying the SUM, AVG, and other things for any group of numbers you have selected. Choose the one you want. Now, select any group of numbers and watch that area for the result. Voila!

*The Edge is published quarterly by Overall Domain Concepts, LLC. To learn more about ODC, or to add your name to our mailing list, please check out [www.odcllc.net](http://www.odcllc.net).*

Editor: Sara Davies

Contributors: Sara Davies, Nancy Dyer, Susan Evans, Diane Forman, Janet Kazmierczak, Olivia McMurray, Pat Sullivan, Bob Varney, and John Wood.