

Partners at Pierce Atwood, 115-lawyer practice, pride themselves on operating in an efficient, business-like manner and providing a high-level of client service. The Portland, Maine based firm has also taken a number of innovative steps unusual for a firm of its size, including forming a government relations consulting arm and hiring professional marketers.

Attorneys in the firm's estate planning practice have kept pace with Pierce Atwood's forward thinking attitude. They have long enjoyed the benefits of an automated drafting system which includes more than 100 estate planning document templates developed using HotDocs® document assembly software. This system enables them to rapidly prepare a high-quality draft of any document a client might need.

oversaw development of the firm's estate planning templates, "What we had was working smoothly, but we wanted to take fuller advantage of it."

In a sense, the estate planners had become victims of their own success. Natively, HotDocs stores client data in separate files, essentially individual islands, each of which knows nothing about the other. The firm had generated over 1,500 separate HotDocs answer files, scattered over servers in the firm's various offices (the firm has five). In some instances, two offices of the firm had separate answer files pertaining to the same client. Duplicate data entry and storage raised the chances of errors and inconsistencies.

Many firms are coming to realize the value of being able to access client data, for a multitude of purposes. One is marketing. For example, when the tax law changes, it would be very beneficial to be able to identify the clients who might need to have their plans updated as a result. If you could identify which clients live in a particular jurisdiction, have a certain level of assets, or whose grandchildren are beneficiaries of a trust, you could target a select group of clients and urge them to contact you for needed services.

Pierce Atwood actually had all the data the firm needed for such purposes, but essentially stuffed away in separate cubby holes where it was unsearchable

*A law firm's estate planning practitioners have combined their existing automated drafting system with EstateWorks TruePlan software to achieve new heights of efficiency and organization.*

**Despite its benefits, their automated drafting system could not solve all problems.**

The firm's attorneys had come to realize that they were facing many challenges that the automated drafting system could not solve. In addition, they were looking for ways to improve the service they provide to clients.

"We were looking for a system we could use to centrally manage information about our estate planning clients," reports partner Terry Ingalls, who

and difficult to get at. "We had inadvertently created a database with valuable information, but it was not usable," Ingalls said.

**Integrating EstateWorks TruePlan, with document assembly, provides a robust solution.**

The firm found a powerful solution to the complexities of managing client information with a document assembly application. Pierce Atwood chose to engage EstateWorks to integrate its HotDocs document automation with EstateWorks' robust estate planning database. EstateWorks has had the web server version of HotDocs running in conjunction with EstateWorks since 2003. Recently, the company began enabling firms to use their own estate planning templates with EstateWorks.

EstateWorks allows a user to be "in" a particular client's file, where all of the information about the client and the status of work on the client's plan is available in a series of screens. One screen is devoted to a list of documents that can be drafted (the way the list is presented can be organized as dictated by the law firm). From this screen, the user selects a document, which results in a HotDocs interview being launched in the user's browser. Any information associated with the client that is stored in the EstateWorks software will

automatically appear in the interview and ultimately in the assembled document.

For Pierce Atwood, one of the benefits of this system is that all client information is stored in one central location, accessible to the firm's attorney's and staff from any of its offices and other locations, such as an attorney's home. Because the information is stored centrally, discrepancies between answer files have been eliminated.

When the firm first implemented the new system, EstateWorks imported all of the existing answer files into the EstateWorks database, allowing Pierce Atwood access to historical data as well as ongoing matters. In the process, EstateWorks worked with the firm to clean up inconsistent data. Of this endeavor, Ingalls says "EstateWorks handled that very elegantly. One day we were drafting documents on our desktop system and the next we were doing so over the web with EstateWorks." EstateWorks also set up the document selection screen to mirror the structure of the firm's original HotDocs library, so that users could easily find the entries for the templates within the EstateWorks software.

EstateWorks also provides the firm with a mechanism for storing all of its templates in one location, making

**TruePlan**

*Instrument Drafting  
and Execution Tracking*

*Automated Task  
Assignments & Alerts*

*Integration with HotDocs®  
Document Assembly*

*Automated Crummey  
Notices and Client Letters*

*Client Gift Tracking for  
709 Preparation*

maintenance easier. Previously, the firm had maintained separate copies of the same template on servers at different offices.

"One of the most gratifying things about using our templates with EstateWorks is the ability to access them over the web," says Ingalls, "The beauty of the web application is that you can use it anywhere".

### **Software helps partners track and manage client work.**

The EstateWorks software provides Pierce Atwood benefits in addition to those conferred by integrating its HotDocs templates with the EstateWorks system. The software provides a dashboard view of the work being done for each client, allowing partners to see at a glance who has done what and what remains to be done. This alerts them, for example, to a task that has been needlessly delayed or overlooked, helping achieve fast and consistent turnaround for clients. It also allows them to track the productivity of the firm's staff, by allowing them to view a variety of reports, such as a list of overdue tasks.

Pierce Atwood is pleased with how well the EstateWorks system has worked with its templates. "Our experience with the EstateWorks-HotDocs integration has taught us that it is robust, easily capable of supporting a system with a many complicated templates," Ingalls says.

The initial success has encouraged the firm to develop HotDocs templates for use with TrueSettlement, EstateWorks' probate administration module. The firm is already using TrueSettlement and has found its management features valuable.

EstateWorks has allowed Pierce Atwood to greatly enhance its existing automated drafting system with a powerful estate planning database and workflow solution. The combination of EstateWorks and HotDocs helps the firm achieve its goals of increasing productivity and the quality of client service and providing ready, access to client information. In the long run, these benefits should improve the bottom line.