

Legal Technology – The Best of What’s Out There

Tech Solutions for Busy Law Practices

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For presentation in:

Edmonton, Alberta – September 18, 2018

Calgary, Alberta – September 19, 2018

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1. **WHAT IS HOT:** Here are a few of the technologies and practice management concepts that are growing in popularity.

A. Document Automation or Assembly:

- i. **Document Assembly Defined:** Most document assembly programs integrate with your word processor and enable you to create sophisticated templates. Those templates typically generate an interview (series of questions) presented to the user. Upon answering the questions, a customized document is instantly generated. In addition to simply filling in blanks, document assembly programs support conditional logic (i.e., include the guardianship paragraph if the client has minor children or adult disabled children), infinite lists, and the ability to calculate text, numbers and dates.

The on-screen interview is quite powerful because the template designer can control everything about the sequence and content of the interview. With practice, you can reproduce your entire decision tree in the template and build in safe-guards that walk even novice users through the assembly process. An example of how an interview looks is shown below: