MacroView

Article

Baker & McKenzie Jumps to Office 2010 and Embraces Templates

Leading international law firm has created and deployed templates that help the firm cut costs, increase lawyer productivity, and polish its worldwide brand.

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Background

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Baker & McKenzie is by some measures the world's largest law firm. Currently it has approximately 10,000 lawyers and support staff in 73 offices in 46 countries. The geographic distribution, and cultural and language differences, make any global system project challenging. But replacing a core system can be especially harrowing. Fortunately, our story has a happy ending, as we successfully developed and deployed Microsoft Corp.'s Office 2010, including new templates. We were able to upgrade our software with minimal impact on our personnel, with the end result of creating new, effective systems, with lower maintenance costs, that also achieved long-desired global standards for document production.

Like many law firms, we bypassed Vista and Office 2007. The upgrade path for those technologies was not compelling from either cost or function perspectives. But when we looked at Office 2010 we realized that it offered many function advantages over Office 2003, so we started planning our upgrade shortly after it was released by Microsoft. Planning kicked into high gear when the first of our clients began talking about also upgrading to Office 2010. While we have completed our project, for firms that have not yet upgraded from Windows XP, this process is now becoming pressing as Microsoft will terminate its support for XP in April 2014.

We realized that our objective was not just to roll out Office 2010 across all our offices, but also to roll out a global set of Office 2010 templates. Templates are automated documents that enable our lawyers and support staff to quickly and easily create new documents that comply with our global branding and font and paragraph styles. They relieve people of having to manually format documents, and allow efficient re-use of both content and variables. For example, once a letter is generated to a client group of litigants, the client contact and matter details can be pre-filled when subsequent correspondence is created.

By introducing a new global set of templates we could minimize the impact on staff productivity during the switch to Office 2010 by automating basic document production and creating an intuitive interface to minimize the time that our lawyers and staff needed to spend on document layout and formatting — as well as generally adapting to the changes in Microsoft Office. We estimated that by adopting the templates and training our personnel to use them we would see a 6.5% productivity improvement— over a bare rollout of Office 2010 — and it required an investment of less than 0.1% of our global revenue for the same period. Although it is impossible to measure accurately, by spot testing during the launch, it appears our estimate was reasonable and affirmed our investment. Some of our partners have since confirmed that productivity in their offices has noticeably improved with the new system.

Importantly the firm had recently completed an exercise to refresh our global brand, including the presentation of our stationery and logos. The new templates enabled us to electronically embed these standards in nearly all documents produced in all our offices. In addition to the overall brand recognition advantages, this eliminated the need for any office to reprint stationery when, for example, a new office is opened. The templates have also reduced global technology maintenance costs by standardizing our document production by using a single shared technology.

Challenges

Of course, even as we articulated all the potential benefits, we were all too aware that this was a project that would face many challenges. Among them:

- **Technical**: There were obvious and considerable technical issues. Not only did we need to roll out Windows 7 (64 bit) and Office 2010 (32 bit) to more than 10,000 desktops in a brand new standard workstation image, but there were also mandatory server and client upgrades to our document management system, OpenText eDocs, and in some cases, we needed upgrades to desktop hardware to enable a 64 bit operating system.

- **Multiple languages**: Languages are a key challenge that has multiple ramifications. All systems had to be able to cope with Unicode/double byte characters. Many of our offices are multilingual, thus requiring multiple language variations of templates in each of those locations, and in some offices multiple languages had to be supported in a single template document. In turn, this required us to gather translations of everything from field names to disclaimers, and find a simple way of incorporating these into a centralized system without creating bespoke templates for each language in each office. Templates had to work with many different Microsoft Office language packs, and our training materials needed to be translated into multiple languages.

- **Paper sizes**: Most locations use A4 paper, but many key offices use "U.S. Letter," and a few offices use both. Changing between paper sizes needed to be as easy as possible, without significantly affecting formatting.

- **Bar requirements**: Bar requirements in some jurisdictions result in, among other things, restrictions on how firms can be represented locally in marketing materials, or require certain information (e.g. disclaimers, lists of office addresses, or partners) to be included or presented in certain ways. Consequently we had to enable different uses of logos, footers, and address blocks, again without creating bespoke templates for each different scenario.

- **Information layout**: It is surprising how many different ways local customs dictate the order and style of things like addressee, date, subject, author and signature in a letter!

- **Styles**: Text and formatting styles could have posed insurmountable obstacles, or at least obstacles that could have resulted in significant delays. Fortunately the firm's recent global brand initiative had already determined standards, though they were yet to be embedded in core systems.

Change Management

We realized that the greatest challenge that we faced was change management — and this was huge. Our lawyers and support staff would be required to adopt an entire suite of new technologies. While the templates might reduce the impact of the change to Office 2010, there would be a learning curve associated with the new templates themselves. If those templates were designed to handle a world of different languages, layouts, bar requirements, etc, there was a real risk that users in any one office or practice group would find them over-complicated and clumsy to use, so they had to be as intuitive as possible. We had to secure local management buy-in to replace local templates systems with a global system, and local IT buy-in to deploy and support the global system. And we needed to get busy partners and lawyers to attend training. This required extensive communication throughout the course of the project.

In view of all the above challenges, and knowing the complexity of our environment, the program we embarked upon could have taken over two years. But we gave ourselves only nine months to get to deployment readiness, with additional time for office-wide installations in accordance with the individual scheduling requirements of each office. And we achieved this goal! How did we do it?

As any good project manager knows, when you are faced with a tough project you need to be sure to narrow down the deliverables as much as possible. Anticipating the potential complexity of automating compliance with our global brand standards, we defined the scope to be a core set of simple templates: blank, letter, memo, and fax.

Barely out of the gate, we rapidly had to extend the scope to include some marketing and due diligence templates, and even agreement templates! If you've ever tried to reconcile U.S., British, European, Australian, and Asian agreement styles, you will know that this was not minor scope creep!

Key Design Principle #1: User Experience

Where the rubber hits the road in any technology project is, of course, in the user experience. Assuming baseline functions and performance expectations would be met, we considered that adoption of the technology would succeed or fail based on the user interface and how easy and intuitive it would be for our personnel to adapt to the new systems. To this end, the global templates system we had proposed had the potential to make or break the project. If it worked well, it would make the transition from XP/Office 2003 to Windows 7/Office 2010 that much easier, and if it didn't work well, it had the potential to create a backlash that could have resulted in a complete failure of adoption.

We sought to standardize the look and feel of all aspects of the user interface wherever a high degree of consensus was possible. And where consensus was not possible, we relied on our second principle:

Key Design Principle #2: Standard Central Core with Customizable Local Components

The global templates system had to have a very flexible design that enabled core components to be standardized at a central level, while permitting easy updating of variable components at both central and local levels. Easy to say, but wickedly difficult in practice! Across **Baker & McKenzie**'s global enterprise there are many small differences that directly affected both Office 2010 configurations and, with more direct impact on lawyers and staff, the templates. In aggregate they posed great logistical and system challenges.

Key Design Principle #3: Launch Applications "Out of the Box " Whenever Possible

While it might seem that we needed to build a highly customized system, in fact our third key design principle was to use out of the box functions for all core systems whenever possible. Because of the complexity of our environment we need to do this to minimize the cost and impact of future upgrade paths. Clearly the templates themselves are bespoke, but their integration with other systems has been designed for minimal impact on core systems.

The Technology

After reviewing the template tools already available in many of our offices, we decided to work with MacroView to develop our system. MacroView is an Australian technology company that specializes in document management and automation systems. It had already successfully deployed Office 2003 templates to all our offices in the Asia Pacific region.

Technical aspects include:

- Integrations: We needed to integrate the template with a range of different systems that varied by location and included Active Directory, OpenText eDocs document management, Outlook contacts and InterAction client relationship management, comparison, and metadata systems and applications, as well as code control and deployment systems.

- Dynamic Ribbon: The Office 2010 ribbon is constructed in real time, based on the template selected.

- Dynamic Dialogs: The screen dialogs that prompt for variable input into each template are constructed in real time, based on settings specific to each template and location. The enhanced Word 2010 ribbon spotlights key desired functions as well as making the global templates intuitive to use.

- Brand libraries: A common store of the various logos, brand elements, legal disclaimers — often translated into multiple languages in single locations — and other bar requirements pertinent to specific locations.

- .Net class libraries and resource files: We needed to enable a common menu interface across Word, Excel, and PowerPoint, and support multiple languages.

- Common styles were needed to implement Baker & McKenzie's standard text and numbering styles.

The Experience

But what does all this mean? It means that a lawyer or secretary can very intuitively and quickly create and style a document, and have key details automatically added from other existing systems without manual data entry. Those documents can quickly be edited or re-styled, and the content or variables (addressees, etc.) in the document can quickly and easily be used to create new documents. These basic features are very intuitive and require almost no training and are consistent across Word, Excel, and PowerPoint.

How Did We Do It?

Careful planning was critical. But equally important was agility, and the ability to quickly adapt to rapidly changing feedback and requirements. We used a highly iterative method, with daily scrums for core team members, weekly meetings for extended team members, and a SharePoint based collaboration site on our global intranet for broader communication, feedback, and contributions.

The project required a high degree of communication and coordination across several internal business and technology teams including: Business Systems, Marketing, Workstation, Document Management, Security, Messaging, Network, Quality Assurance, and Knowledge Management. It also required coordination with or management of key vendors including MacroView, OpenText, Payne Group, Microsystems, and Microsoft.

Strong leadership was essential, as was a willingness to take calculated risks in decision making to enable rapid progress to be made. This was only possible because the core team included lawyers who had transitioned into technology, who could make accurate assessments of usability and business acceptability of key processes, features and interfaces.

I led the project, which involved many people from our offices around the world. Key contributors included:

- Maria Luisa Paul, from Chicago, who previously worked as a lawyer in our Caracas office and led the requirements development and liaison with our offices.

- Consultant David Morgante, from Sydney, who had previously worked in marketing in our Sydney office who coordinated the development effort.

- Steven Martin, from Chicago, the project manager.

- Jenny Wong, from Hong Kong, who led our global training effort.
- Our office IT managers, from all over the globe, who guided our efforts and led deployments.

Overall Result

Preliminary planning began in late 2010, the project commenced in July 2011. We were ready for deployment by March 2012. Within one year — by March 2013 — 71 of our then 72 offices had completed the installations (including training lawyers and staff). The last office was in progress. Perhaps most gratifyingly, most lawyers and support staff throughout our global firm have adopted the templates, largely without complaint, and with more than a few notes of thanks.

As offices have become more aware of the power and flexibility of the system, local staff have started creating templates of their own using the global templates (including their automation) as a baseline.

Shortly after we went live, the firm opened offices in two new locations — Istanbul and Lima. Previously individual offices using pre-printed letterhead stationery would have had to either discard existing stationery and reprint their letterhead stationery, or use inaccurate letterhead until their stationery supplies were exhausted. With short notice, we were able to change the letterhead of all offices on the day before the new offices officially opened. Not only has our global templates system saved the firm money, and increased productivity, it has helped us respond agilely to the changing face of our world market.

Finally, while there are no doubt more important factors that go into brand recognition, consistent quality in document production across all locations certainly contributes to brand recognition. In 2012 Acritas — which provides legal market research — reported that **Baker & McKenzie** is the most recognized law firm brand in the world, and had improved from seventh place to third among firms in the United States.

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