

PRODUCT BRIEF

Data Pooling & the Matter Record

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Current Situation

Re-keying = Inefficiency and Errors

Re-keying matter data across client documents is a significant burden for law firms. This process not only leads to inefficiencies but also increases the likelihood of inaccuracies and errors as information is transposed from one system or document to another.

Smarter Drafter has addressed part of this issue by integrating with Practice Management Systems, reducing the need to rekey client information like names and addresses. However, in cases such as divorce proceedings, where a defined sequence of documents relies on specific details, re-keying remains a bottleneck. For instance, information must be replicated across the Initiating Application, the Financial Statement, and the Application for Consent Orders. While document automation speeds up the drafting process, the need for a user to repeatedly re-enter the same information slows down efficiency.

Instruction-Taking Forms

Smarter Drafter currently includes online instruction-taking forms that can be emailed or embedded on a webpage. However, when these forms are customised to capture simple data that clients can easily enter, they are delivered in a pro forma format that doesn't match the final precedent. The alternative—sending a form that is the actual final document—often results in a document that is too complex and lengthy for clients to complete.

In both scenarios, the data is confined to the document that initially received the client's instructions. There's no way to share this information with subsequent documents in the sequence (e.g., after completing a Will, moving on to Enduring Guardianship). Essentially creating a 'data island' within Smarter Drafter.

Waging War on Re-keying

Introducing Data Pooling

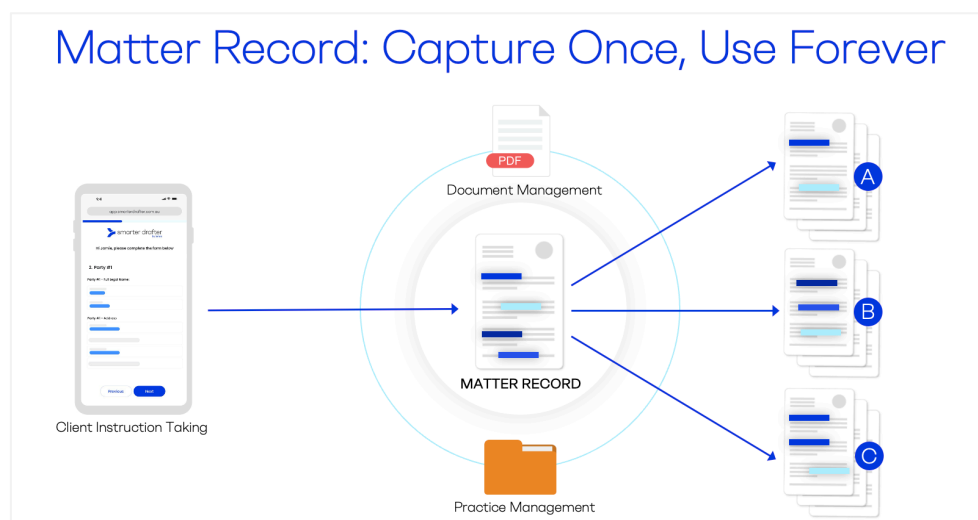
The latest release of Smarter Drafter introduces Data Pooling. At its core, this feature allows Knowledge Managers to map matter data entered into a client document to one or more subsequent documents as the matter progresses. Additionally, the data captured can populate a matter's properties within an integrated Practice Management System, ensuring that key matter information is readily available across the firm. Data Pooling eliminates the concept of a 'data island,' breaking down barriers and enhancing workflow efficiency.

While 'Data Pooling' accurately describes the technical implementation, it doesn't fully convey the strategic advantage this functionality delivers to a law firm.

Promoting the Matter Record

With Data Pooling, Smarter Drafter can now collate a Matter Record — a datasheet-style document where all key information is **captured once** and shared across client documents and integrated with Practice Management solutions.

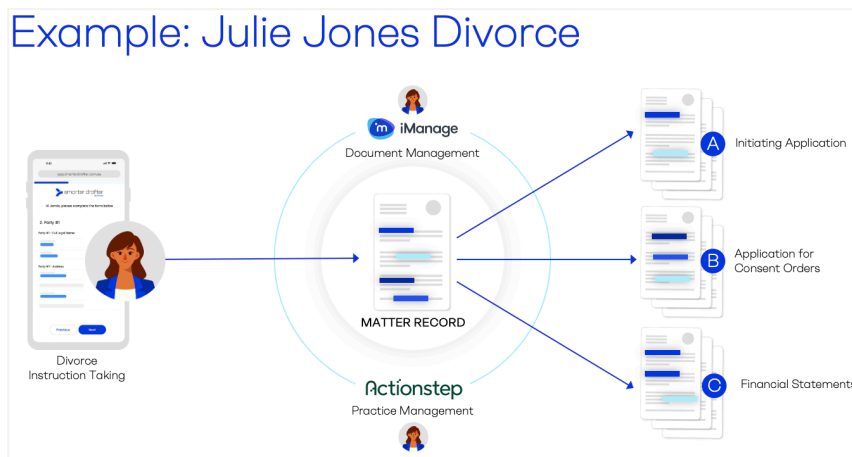
The Matter Record can be populated via dedicated, client-facing instruction-taking forms and with client details from existing Smarter Drafter Practice Management integrations. Further information can be captured during face-to-face interviews or transposed into the Matter Record by a paralegal. This Matter Record is then **available for all subsequent documents** created during the matter, eliminating re-keying, reducing overall document completion time, and increasing accuracy.



Example Workflow

A Family Law team follows an internal procedure when managing a divorce matter:

- **Step 1:** The client completes an online instruction form, designed with simple, client-friendly language for quick and easy completion. The information from this form populates the Matter Record.
- **Step 2:** A Lawyer conducts a phone interview with the client, gathering additional, more complex information that might not be suitable for a simple online form. The paralegal adds this information to the Matter Record and completes the submission. This process shares the data with the integrated Practice Management Solution. As a result, the matter data is readily accessible to all team members working on the case. If needed, the Matter Record can be exported as a PDF document for client sign-off or saved in a Document Management Solution like iManage.
- **Step 3:** The Matter Record is now accessible for lawyers to complete the relevant precedents—in this case, the Initiating Application, Financial Statement, and Application for Consent Orders etc. Since the data has been mapped from the Matter Record, the precedents are automatically populated, eliminating the need for the lawyer to consult separate systems or files.



Available Now

Data Pooling & the Matter Record is an Enterprise only feature and available now. As the feature is currently gated, customers must request access for the feature to be unlocked.