



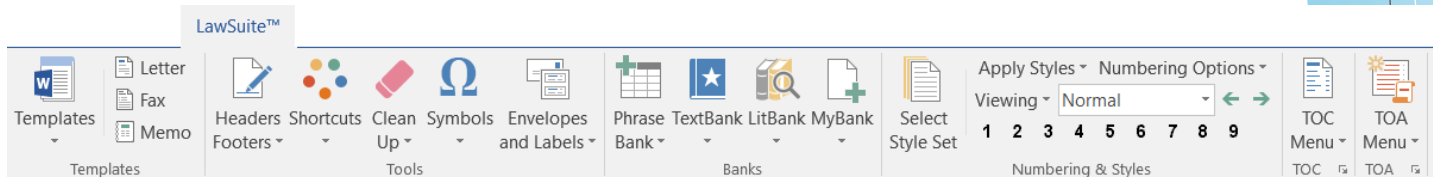


LawSuite®  
Easier, Quicker, Better

- Lawsuite includes a full complement of ready-to-customize templates and features designed for law firms.
- Our templates and author spreadsheet allow you to maintain the firm's standards and branding while allowing you to provide a customized level of user options for personalization and individual style.
- Why chance picking up metadata by recycling documents with questionable history? Use LawSuite templates to ensure reliability and stability.
- Lawsuite builds upon Word's native functionality which has many benefits, one being a more stable and hassle-free environment over other macro solutions.
- Lawsuite is easy to customize, quick to install and simple to learn.
- Provides the ability to quickly fix inconsistently formatted documents.
- Simplified Paragraph Numbering through the use of Style Sets based on Word's Heading styles.
- An affordable pricing structure and simplified licensing model with a generous support and upgrade plan.
- Lawsuite is customized according to the needs of your firm and can evolve as your firm grows.
- Add additional templates or custom functionality anytime, handle as much of the maintenance and development in-house as you like with no additional development-relationship fees.
- No complicated modules or pricey add-ons.
- Existing in-house macros or forms can easily be added to LawSuite under an existing button, new button or new command group.
- The firm's best practices can be effortlessly followed leading to increased productivity and profitability.

**LAWSUITE IS A USER-FRIENDLY  
SOLUTION FOR DOCUMENT  
AUTOMATION AND  
STANDARDIZATION, PROMOTING  
USER EFFICIENCY AND A  
STREAMLINED DOCUMENT  
PRODUCTION PROCESS.**

# LAWSUITE FEATURES



Standard LawSuite Ribbon

## TEMPLATES

**Generate:** Quickly generate letters, fax cover sheets, memos, pleadings and administrative forms.

**Assemble:** Easily assemble estate planning documents, engagement or audit letters using our document assembly tool.

**Maintain:** Our “dynamic template menus” generate automatically based on the templates stored in a folder. Your author database is easily maintained in an Excel spreadsheet or Access table.

## DOCUMENT STAMPS

Our *Stamp* tools insert the document number or path and filename into the footer or location of your choice. LawSuite works with all popular document management systems.

## SHORTCUTS

Our Shortcuts menu includes a variety of macros, shortcuts and handy features, including an attorney favorite, *Reveal Hidden Markup*. The Shortcut menu is a great place for your firm’s in-house macros.

## CLEANUP

Our Cleanup tools include the ability to identify and fix formatting, strip direct formatting, delete excess section breaks and hard returns, restore tab settings, set the Normal style, and perform a restoration of a badly-formatted or corrupt document.

## ENVELOPES AND LABELS

Quickly generate envelopes and labels from a letter or using one of our templates, or create labels from a list of addresses (such as a service list).

# LAWSUITE FEATURES

## NUMBERING & STYLES

With simplified paragraph numbering based on Word's Heading Styles, LawSuite provides 35 customizable Schemes with three different text wrapping options. Each style set includes nine levels of numbering plus a collection of common non-numbered styles.

## TEXTBANK

LawSuite provides a solution to the common task of having to open old documents to reuse routine blocks of text. Instead, store blocks of text in our Banks for easy retrieval into the document. Examples include COS, POS, clauses, signature blocks, transactional signatures, firm logos, etc. Our standard banks include TextBank and LitBank, but you can add as many banks as you wish, EstateBank, TransBank, CorpBank, etc. Our "MyBank" provides a personal bank for each user.

## TABLE OF CONTENTS

Easily generate a TOC for any document using Styles or TC fields. LawSuite provides every option you might need including an automated Style Separator feature for run-on paragraphs.

## TABLE OF AUTHORITIES

We provide convenient access to all native Word TOA commands along with our *Delete all TA fields* macro so that you have everything you need when generating your next TOA.

## LITIGATION

Our collection of Litigation Tools includes customized pleading templates for your state including Federal, State, Bankruptcy, Appellate, Superior, Water Court, Tax Court and a numbered lines pleading template. A Discovery Heading feature for inserting Interrogatories and other common headings and responses is included. The LitBank stores multiple POS, COS and notary choices, verifications and many others, organized by category if you wish.



# TRAINING AND LAWSUITE INTEGRATION

## Change Management and LawSuite Integration

While many staff members are willing to learn better ways of getting the job done, the truth is, the current document production processes and habits are embedding into firm culture. In our experience, if you provide a user with an incentive (a tool that is easy to use and offers better, faster methods for completing tasks and training) you've got the winning formula for success. Allow us to work with you to create a strategy for managing positive change and integrating LawSuite's powerful features into the fabric of your firm's processes.

## Blended Training Solutions

We were trainers before we were developers, so training is always an important part of the LawSuite onboarding process. LawSuite users benefit from a blended training solution using LawSuite with MS Word. With blended training, you will actually require less training than training on Word alone.

## Training Services Included with Maintenance:

### Training Video Library

All users will have access to a complete library of training videos covering many LawSuite and blended Word/LawSuite topics.

### Technical Training

Technical training for IT personnel is included with your package. Available on-site or via remote connection, we will thoroughly cover LawSuite architecture, configuration, installation and maintenance. New members of your IT group can schedule a complimentary technical training session with us anytime.

### One-Hour LawSuite Overview Video

Ideal for training new hires, you will receive a one-hour overview training video on the use of your package.

### Train the Trainer

Our Train-the-Trainer course will fully prepare your training staff to fully prepare your users to take full advantage of LawSuite. The TTT course is also suitable for the LawSuite administrator and Liaisons.

## Optional Training Services:

### Web-based Training

A variety of training sessions can be delivered via

### Training Credits

If you received Training Credits with your LawSuite package, these credits can be used towards any training activity, including user training and custom videos. Training credits are one of the possible add-on perks included in LawSuite pricing packages. See your account representative for more details.

webinar. Select from one of our standard classes or a custom class can be created for you. Hands-on practice can be added.

### Customized Training Videos

We can provide customized training videos on topics of your choice.

## On-Site Training Methods:

### Hands-On Instructor-Led Training

Hands-on training provides one of the most thorough training experiences for your users.

### Demonstration-Style Training

Demonstration-style training using conference room and projection equipment is a popular option. Hands-on practice can be added.

### Floor Support

Post-training floor support promotes user confidence and allows completion of check lists and important one-on-one time with the trainer.

### Desk-side Training

Especially popular with attorneys, desk side training provides a private setting for personalized upskilling and workflow analysis/improvement.

# TRAINING AND LAWSUITE INTEGRATION

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## Training and Assessment Tools

### **Efficiency Consulting and Performance Improvement**

Incorporating a macro package into your system's environment is the perfect time to conduct a needs and efficiency assessment. A client who is able to analyze the results from these assessments along with user skill surveys is better able to determine specifics for LawSuite function, workflow design and best practices, and will have a bird's-eye view of the firm's document production machinery as a whole.

Talk to your Project Manager about incorporating these systems and services into your LawSuite project.

### **Core Competency Standard Creation**

The general trend towards adherence to industry wide core competencies has everyone considering how they rate compared to other firms. These standards can be incorporated into your training program and individual Learning Plan Worksheets.

### **Workflow Design and Implementation**

We can analyze your current workflows and determine how LawSuite can improve and expedite those workflows. We can also assist in determining and highlighting best practices for inclusion into your training and LawSuite on-boarding process.

### **User Skill Surveys**

User skill surveys can be distributed, analyzed and data provided to client, before and/or after LawSuite deployment (included with package).

### **Learning Plans**

Learning plans provide a road map for each user, detailing the MS Word + LawSuite blended topic list along with the firm's core competency skill sets, best practices, prescribed procedures, etc. See your Project Manager for more details (included with package).

## VALUE ANALYSIS

An analysis of the bottom-line impact that a macro/template product has on the profitability of your firm will show a substantial net value and return on investment. See [www.law.com](http://www.law.com), May 8, 2007, "Beware the Hidden Costs of Bad Formatting" by Roberta Gelb where the yearly losses for her 20 member test firm were over \$750,000 resulting from secretaries and associates using ineffective editing techniques in native Word. LawSuite provides necessary editing tools, numbering styles, shortcuts and templates, which when combined with the proper training provides a winning combination that is guaranteed to reverse wasteful document production habits and boost your firm's profitability.

### LAWSUITE BENEFITS BY JOB TITLE

Management				
Attractive Pricing	Simplified Licensing	Promotes Adherence to Best Practices in Word	Enforces Branding Standards for a Polished Image	
IT				
Simple to Deploy and Update	Reduced Training Time Due to Blended Training and Web-based Training Resources		Ability to automate the setup and configuration of your MS Word environment	
Staff				
Easy to Use	Paragraph Numbering and Styles are Simplified	Greater Volume of Documents Processed in less time	Forms & Shortcuts are Easily Accessible	No Hunting for Firm Standards or Attorney Preferences
Attorneys				
Realize an Exceptional Return on Investment	A LawSuite purchase serves as proof of a firm's commitment to providing document production value to their clients		Document cleanup and formatting protocols increase productivity and decrease frustration for everyone	

### Pricing

Number of Users	1-9	10-24	25-49	50-99	100-249	250-500	501-1500	1501-5000
Base Licensing (per office, lifetime)	\$600.00	\$900.00	\$1200.00	\$1500.00	\$1800.00	\$2100.00	\$2400.00	\$2700.00
Package Price (per user, lifetime)	\$155.00	\$125.00	\$95.00	\$80.00	\$65.00	\$50.00	\$35.00	\$20.00
Maintenance (per user, per year)	\$65.00	\$55.00	\$45.00	\$40.00	\$35.00	\$30.00	\$25.00	\$20.00

Pricing Table – Rev. 11/02/2017

*Please contact our office for current specials and discounts.*

## PROJECT MANAGEMENT

- Each LawSuite project is assigned a project manager and project assistant. These two representatives will take the project from beginning to end.
- We utilize a project management website to facilitate communications, task lists and file updates throughout the project.
- We offer on-site or remote LawSuite project management and development.
- We provide a detailed questionnaire and a project planner along with template and numbering scheme catalogs to make creating your LawSuite package fun and easy.
- We offer full-service LawSuite project management, development, beta testing, user and technical training for our firms. For large-scale projects we recommend that the training be provided by one of our national training partners such as Traveling Coaches or Brain Candy, Inc.
- A development partnership is formed with each LawSuite firm so that you are free to maintain and develop your own package as you wish. We provide the necessary training for your in-house personnel depending upon the level of LawSuite development involvement desired by your firm.

## LAWSUITE INSTALLATION AND MAINTENANCE

LawSuite's simple design and back end requirements make it an attractive choice for firms of all sizes. LawSuite can provide simple automation and setup for smaller firms while providing unlimited functionality and growth potential for larger firms. The basic LawSuite package can be enhanced by our programming team or provide a starting place for an automation platform designed by your in-house personnel.

Many times macro packages are weighed down by complicated functionality that isn't used. The basic design of LawSuite provides an affordable and streamlined solution that can be built upon at a fraction of the cost of some popular macro package products.



## About Us

Stein Consulting is a 21 year old Florida-based company specializing in providing enterprise-class document automation solutions through our premiere software product, LawSuite. LawSuite is a comprehensive suite of tools used with MS Word to expedite the legal document production process. The LawSuite Ribbon contains an intelligent collection of complimentary tools designed to work in a synergistic manner.

## About the Creator of LawSuite

Our co-founder and the creator of LawSuite, Julie Stein, has been working with attorneys since the late 70's. She is a law office workflow specialist, software developer and trainer. LawSuite represents the best of her many years of experience creating automated solutions in the document processing arena. With over 35 years of experience in the legal environment, Julie is now focused on making Lawsuite the best it can be for her clients and spends her time mentoring consultants and resellers.

### LawSuite Configuration

#### SYSTEM REQUIREMENTS:

Any version of Windows

Office 2007, 2010, 2013 or 2016

2.0+ GHZ Processor

2 GB RAM

500 MB available hard drive space

#### INTEGRATION FOR STAMP MACROS:

All Document Management Systems including but not limited to: Autonomy WorkSite, OpenText DM, WORLDOX and NetDocuments

#### INTEGRATION FOR CONTACTS:

Contact Managers: Microsoft Outlook, Lexis-Nexus InterAction, Novell GroupWise and Lotus Notes



#### Office Location/Mailing Address:

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