



Learn how Lexis® for Microsoft Office® turned hours of work time into minutes at Burr & Forman

Overview

Firm: Burr & Forman LLP

Location: Nine offices throughout the Southeastern U.S.

Industry: Legal services

Customer Profile: Tracing its roots back to 1905, Burr & Forman LLP is a full-service law firm with nearly 300 attorneys and offices in Alabama, Florida, Georgia, Mississippi and Tennessee. Burr & Forman offers a wide range of business and litigation services to diverse clients with local, national and international interests.

Business Situation: In 2012, the firm initiated a review of its online legal research providers and set out to restructure its contracts. In working with LexisNexis, the partners sought to bundle a variety of LexisNexis® research tools and services including Lexis® for Microsoft Office®, Lexis® Search Advantage and CourtLink®, in a way that would enable them to obtain the latest legal research technology within the most cost-effective pricing model.

Solution: The firm's partners and knowledge services professionals met with a LexisNexis representative who demonstrated Lexis for Microsoft Office, version 4.0 with Document Tools, an exclusive offering from LexisNexis that leverages the seamless integration of LexisNexis legal research content and the open Web with Microsoft Office applications attorneys use every day. A few senior litigation partners were immediately struck by the potential of this new offering and directed the law firm library team to include Lexis for Microsoft Office 4.0 with Document Tools in its new bundled agreement.

Results:

- **Timesavings** – Burr & Forman legal professionals are now able to complete citation checks in briefs in as little as 30 minutes, as opposed to the three to four hours that were routine in the past.
- **Installation** – Lexis for Microsoft Office was successfully rolled out inside the firm in a smooth and seamless manner, which enabled the firm to achieve widespread adoption and begin capturing the timesavings benefits very quickly.
- **Workflow** – The seamless integration between Microsoft® Word and LexisNexis research content has made the drafting of work product much easier and more efficient for the firm's attorneys, paralegals and other professionals.
- **Support** – The Burr & Forman knowledge services team has received excellent customer service from LexisNexis, ranging from product developers to technical support professionals, and is encouraged by the product roadmap for Lexis for Microsoft Office.

Product Summary: Research Solutions

- Lexis for Microsoft Office 4.0 with Document Tools
- Lexis® Search Advantage
- LexisNexis® Courtlink®

A Century of History

For more than a century, Burr & Forman LLP's experienced legal team has served clients with local, national and international interests in numerous industry and practice areas, ranging from commercial litigation and class actions to corporate transactions, including bankruptcy and restructurings. The firm traces its roots back to 1905, when it was founded in Birmingham, Ala.

Today, Burr & Forman is one of the most highly regarded law firms in the Southeastern U.S., with nearly 300 attorneys and nine offices throughout the region: Atlanta, Birmingham, Ft. Lauderdale, Jackson, Mobile, Montgomery, Nashville, Orlando and Tampa.

Burr & Forman attorneys draw from a diverse range of resources to help clients achieve their goals and address their complex legal needs. The firm's attorneys work with their colleagues across all offices and practice areas to ensure all of its clients receive the services they need to pave the path as a leading innovator for the years ahead.

“We were immediately impressed with Lexis for Microsoft Office because we saw the huge potential timesavings in our ability to access content, services and drafting tools from LexisNexis and other sources while operating directly within Microsoft Office applications.”

—Shawnte Thomas
Practice Group Analyst, Burr & Forman

Situation

In 2012, the firm initiated a review of its online legal research providers and set out to restructure its contracts.

“We’re constantly reviewing our third-party vendor expenses to make sure that we’re obtaining the best possible value for the firm and our clients,” said Helen Walker, Manager of Library and Knowledge Services at Burr & Forman. “We have always had an excellent relationship with LexisNexis and have found them to provide good value for our investment, so we sat down with their representatives to learn more about what they could do for our firm.”

In advance of their meeting with LexisNexis, the partners asked for guidance with how to bundle a variety of LexisNexis® research tools and services in a way that would enable them to obtain the latest cutting-edge legal research technology within the most cost-effective pricing model.

“They told us they had something exciting to show us that was a major competitive differentiator for LexisNexis,” recalled Walker, “so we were eager to check out their latest innovation in legal research.”

Solution

The firm’s partners and knowledge services professionals met with a LexisNexis representative who demonstrated Lexis® for Microsoft Office®, an exclusive offering from LexisNexis that leverages the seamless integration of LexisNexis legal research content and the open Web with Microsoft Office applications attorneys use every day.

Lexis for Microsoft Office is a drafting and review tool that significantly cuts down on the time it takes for lawyers and other legal professionals to draft or respond to legal documents, such as briefs, pleadings or motions. It achieves this by running right within the Microsoft® Word documents or Microsoft Outlook® emails in which most legal writing takes place.

“We were immediately impressed with Lexis for Microsoft Office because we saw the huge potential timesavings in our ability to access content, services and drafting tools from LexisNexis and other sources while operating directly within Microsoft Office applications,” said Shawnte Thomas, Practice Group Analyst at Burr & Forman.

Thomas noted that, “instead of toggling between the legal research application and Microsoft Word, for example, we could just click on direct links to research relevant to the brief under development.” Thomas was

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likewise impressed that, if the firm’s professionals needed to track down some information from the open Web, “Lexis for Microsoft Office allows you to just click on a word or case name and seamlessly access content about that item from the Internet.”

A few senior litigation partners who tested the new product were also impressed by the potential of the offering and directed the law firm library team to include Lexis for Microsoft Office in its new bundled agreement with the firm.

Results

1. Turning 3 hours into 30 minutes

The first and most important benefit that Burr & Forman has realized with the Lexis® for Microsoft® Office tool has been substantial timesavings in creating work product, such as briefs, pleadings and motions. This translates into improved client service as documents are created and finalized in much less time and in reduced expenses to clients as work gets done faster.

“Lexis for Microsoft Office has exceeded our hopes when it comes to the amount of time the product has saved our legal professionals while completing important documents,” said Thomas. “One of our legal secretaries was putting together a brief recently and was able to complete the citation checks in just 30 minutes. She told us that same volume of work would have taken her three to four hours before she had access to Lexis for Microsoft Office, and that tremendous amount of timesavings is very typical around our offices on a daily basis.”

2. Quick and Easy Installation

Walker and Thomas worked diligently with the LexisNexis team to make sure they gave the Lexis for Microsoft Office deployment the greatest chance of success. The LexisNexis trainers spent significant time working with Burr & Forman professionals to raise their comfort levels with the product and the LexisNexis customer service representatives worked with Walker and Thomas to roll out access to Lexis for Microsoft Office on a timetable with which everyone was comfortable.

“We started with a pilot launch in our Birmingham office and, after that went very well, we promoted it aggressively throughout the firm to maximize

awareness,” said Walker. “The result was a remarkably smooth and well-received installation that allowed us to achieve widespread adoption and begin realizing the benefits of the product right away.”

3. Significant Improved Workflow Efficiencies

The seamless integration between Microsoft Word and LexisNexis research content has made the drafting of work product much easier and more efficient for the firm’s attorneys, paralegals and other professionals.

“Lexis for Microsoft Office is a powerful legal drafting and review tool that has significantly improved our workflow efficiencies by allowing our legal professionals to work within the Word documents and Outlook emails in which they’re already working,” said Thomas.



Check Cite Format: Clear status icons help you see at a glance which citations are correct, and which may need correcting.

Conclusion

“We’ve had a terrific experience working with the LexisNexis customer support team and all of the specialists they’ve brought to bear in order to make our use of Lexis for Microsoft Office so successful,” said Walker. “We’ve been assisted by product developers, engineers and technical support professionals at LexisNexis, all of whom have been focused on helping us get the most out of this product.”

BURR FORMAN LLP
results matter



Helen Mellett Walker

Helen has worked in law firms for 15 years. Her current position is Manager of Library and Knowledge Services at Burr & Forman LLP, a Southeastern regional firm with 250+ attorneys. Before joining Burr, she was the Assistant Librarian at Bradley Arant Boult Cummings LLP. Helen earned her MLS from the University of Alabama. She is an active member of American Association of Law Libraries, and has served two terms as President of LLAA (Law Libraries Association of Alabama).



Shawnte Thomas

Shawnte Thomas is a Practice Group Analyst with 14 years of extensive IT experience and software skills, and works for Burr & Forman LLP. As a Practice Group Analyst she works with a team that is responsible for the development of training programs, software testing and implementation and other workflows/ processes that help in obtaining the most efficiency from the end user. Shawnte has a B.S in Management Information Systems and is also an iManage Certified System Engineer.

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