FREE WORKSHEET

Word LX™

TEMPLATE AUTOMATION WORKSHEET.

Plan your first automated Microsoft Word template on one page, with the practice group lead, before anyone opens the Developer tab.

PART 1

PICK THE DOCUMENT

Document	Produced per year	Minutes each	Hours a year	Template owner
e.g. engagement letter				

Hours a year = documents per year x minutes each, divided by 60. The highest number goes first.

PART 2

MAP THE VARIABLES

VARIABLE	TYPE	WHERE IT APPEARS	CONTROL OR FIELD
Client Name	*Text*	*Header, page 1, signature*	*DocProperty field*
Governing Law	*Choice*	*Clause 14*	*Drop-down list*

PART 3

THE 7 STEPS

- [ ] Collect 10 real versions and compare them
- [ ] Fix the Styles and automatic numbering
- [ ] Mark every variable and finish the map
- [ ] Add content controls and fields
- [ ] Save optional clauses as Quick Parts in the template
- [ ] Save one .dotx in one shared place
- [ ] Test on a live matter and name an owner

PART 4

WHERE WORD RUNS OUT

- [ ] Matters often need 5+ documents with the same details
- [ ] One clause change would touch 10 or more templates
- [ ] Your current templates depend on macros
- [ ] Nobody can say which version is the approved one
- [ ] More than 3 people edit templates with no review

Score 1 for each box you tick.

PART 4 SCORE

0 to 1
Native Word is enough. Follow the 7 steps.

2 to 3
Build in Word now and plan for a template tool.

4 to 5
You have a library problem. Talk to us.

Past one template? Word LX manages law firm templates and clauses inside Microsoft Word. Bring your most used template and we'll walk through it with you.

Book a walkthrough