

# Stop Copying and Start Leveraging with Knackly



## *“Stop Copying and Start Leveraging?”*

Computer scientist Larry Tessler developed the cut, copy & paste functions we’re so familiar with today in 1983. While they have—and will continue—to serve us well as some of the fundamental editing tools in document production, there are modern needs that Larry could not foresee in 1983. That is where Knackly steps in.

Leveraging your information instead of copy and pasting it means getting more out of your documents, your client management systems, and your staff’s productivity. Archimedes said that with a lever long enough and a fulcrum to place it on, he could move the world; Knackly is designed to help you move your world of document production to a new level of efficiency.

Copying and pasting information from one program to another is time-consuming and tedious, and can still lead to errors in your documents—one mis-copied name proliferates itself throughout your system, with no easy way to correct it in every place it is used.

With Knackly, you can instead *leverage* your information by having a single data-entry point which can flow from program to program and regenerate documents with corrected information in no time at all.

# Leveraging: What it does for you

Leveraging your data and your existing internal systems means giving you control over how your information is used in your documents.

Leveraging equals more **control**. More **power**. With **less work**.

This is the leverage that Knackly delivers:

- 1) A client-facing intake process that **shares data** across multiple platforms
- 2) **Cut up to 95%** of the hours you're currently spending on document creation
- 3) Permitting **clients to provide details** remotely
- 4) Guaranteeing **100% accuracy**

## How do we do it?

Instead of copying data, Knackly provides a set of customized tools to collect information and populate all the systems in your office. In one step, you can complete your CRM screens, intake documents, petitions, filings, letters, and more all error-free and all at once.

## What are the results?

We are consistently seeing a 75% to 95% reduction in the time it takes to create documents.

This means that in a given month if you are spending 30 hours creating documents you will see that time go down to 7.5 to 1.5 hours a month. In the average firm, this means a cost savings of over \$1000 a month per person drafting.

# Stop Wasting Time



A central theme with Knackly is to Stop Wasting Time. You see it throughout our system, whether during the intake process with External Client Interviews through to how our architecture is designed. We are always looking for ways to allow you to work on tasks that are important to your clients instead of wasting time on paperwork.

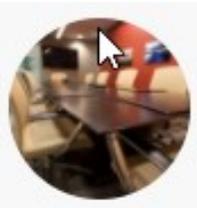
## Eliminating Errors

Most documents are drafted by either reusing a prior client's documents as a starting point or utilizing Word templates. In either case, the risk of introducing errors into your documents is high.



Errors creep in when the prior client's document you started with had a provision that is wrong for the new client you are reworking it for, or when find and replace misses a name or other personal information. Using multiple Word templates can allow information to get lost unless everyone is on exactly the same page as to which templates should be used.

With Knackly, you start with a fresh document every time so that old information doesn't carry through to the new client's documents, and the interview guides you or your staff through the process of creating the documents.



*We couldn't be happier with the results we are getting because of **Knackly**. It used to be that we had to have someone else proofread each document that goes out. Now, we have confidence that our documents are right every time! This has not only given us peace of mind, but has reduced costs and increased profitability for our firm.*

**John Griffin, Firm Administrator, Saalfeld Griggs**

# Increase Efficiency

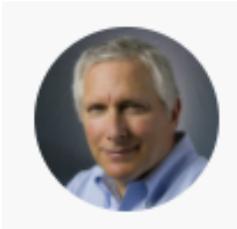


Knackly users are seeing a 75% to 95% reduction in time to draft their documents.

This time is saved through the two prongs of document production—the initial drafting and the review process.

In Knackly, instead of combing through old client files for an appropriate starting document or pulling previously-saved provisions from several different places, you or your staff will start the document creation process by going into an interview which will ask you smart, dynamic questions based on the type of document you need to create. Knackly will then use your answers to create a document based on YOUR templates and YOUR existing documents and styles, without running the risk of errors coming in from previous client files or provisions being missed.

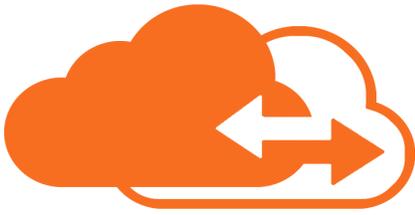
Once documents are created, the review process with Knackly is simpler and cleaner; where you know no previous client information crept over, and all the information you used to create the documents is reflected in them, your review process can be a quick and simple overview to ensure everything is in place for



*Knackly helped us go from creating a set of documents for our clients in 80 hours to less than 4 hours. It has been a game-changer for us to produce documents in 95% less time.*

**Dan Offner** SUP and O&A Legal

# Best-in-Class Integrations



Connecting to other systems is key to creating an efficient office. With our open API, Zapier Connection, Clio, FileVine, and other direct system connections, we have you covered.

Write-back is an essential part of a good integration, where you can change information in either system and update it so that you have consistency in your data. Knackly's integration allow write-back across platforms so that you maintain information integrity effortlessly.

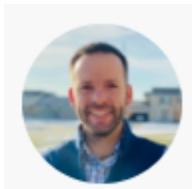
## Object-based Approach

Reduce, Reuse, and Recycle with Models

One of the benefits of Knackly is being able to create universal models that you can reuse as many times as needed.



- Reduce the need to manage multiple instances of similar information; for example, you need only create one model for “party” to gather information for many different types of people
- Reuse the “party” model for Client, Spouse, and Children in an estate planning system, or for Plaintiff and Defendant in a litigation practice.
- Recycle information that is used in one instance into as many other instances as needed. A spouse may also serve as an executor in a will, for instance, without needing to re-enter the spouse's information as the executor's information.



*We have tried a number of different document automation systems and every time we found things it wouldn't let us do, we would try something else. Then, we tried Knackly and we have automated everything we need..*

# Client-facing Interviews



Currently, most offices have two basic ways of collecting client information remotely: either you send out a document that the client fills in and returns, or you create a web form where the client can enter their information.

In both of those scenarios, your staff usually has to re-enter the information from the form into your client management system, and frequently your staff also then has to take the information from your client management system and type it into documents when they are drafting.

Knackly has a better way.

With Knackly, your client intake process is online, like the web form option above. However, the Knackly system then can import your client's entered information directly into your client management system, programs like HotDocs, and even better your Knackly-automated documents.

No re-entry by your staff. No errors, typos, or differences from what the client entered.

Additionally, Knackly allows your clients to upload files directly into the client intake process. Bank statements, titles, deeds, and any other necessary documentation can be collected right along with the client intake, reducing the steps your clients have to go through in order to get you the information you need.



## Knack and Associates

Please sign in to access Knack and Associates Portal

 SIGN IN WITH GOOGLE

 SIGN IN WITH FACEBOOK

 SIGN IN WITH MICROSOFT

 SIGN IN WITH EMAIL

The screenshot shows a web form titled "Knack and Associates" with a tree logo. The form is divided into sections: "Property Information" with radio buttons for "Who is the Lessor" (First Rents, Knackly Rents) and "Rental Property"; and "Tenant Information" with a list of tenants. Two tenants are listed: "1. John Doe" and "2. Jane Doe", each with a green checkmark and a close button. There is also an "Add another" button. At the bottom, there are "Save and Exit" and "Complete" buttons.