



Improving Client Experience Through Technology

A practical guide for law firms



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INTRODUCTION



Every law firm says that they are client focused. As a lawyer, your top priority is your client work. We know the lawyer-client relationship is fundamental to keeping clients happy and coming back. However, no one person can control client experience in its entirety – it is a firm-wide endeavor. How does your firm put this into action?

Client experience is made up of hundreds of touchpoints throughout the client’s journey with your firm. From the first response they get from an inquiry form or calling your reception desk, to the updates they receive from you and your team throughout their matter and the ease of access they have to case files.

The challenge is how you and your team keep up with client expectations for each of these touchpoints.

Especially when service expectations are getting higher all the time. How do you make sure every interaction and communication your client has with your firm adds up to exceptional client experiences?

We’d like to show you how to do just that, and, how using technology can help you stay in control, without the need for micro-managing every little detail.

From this paper and our ABA TechShow 2021 CLE presentation, we intend lawyers and their teams to:

- Understand what great client experience looks like.
- Understand who is responsible for client experience.
- Understand the role of technology in client experience.
- Understand how to put your ideal client experience into action.



Firstly, let’s look at what client experience actually means.

CLIENT EXPERIENCE



Client experience is any moment where a professional service is experienced by its clients. We all understand what a good service experience looks like and feels like. Has the service been designed to make it easy for the person using the service? Have their expectations been correctly set? Have their needs been anticipated and met?

The stakes for professional services have never been higher. When it comes to service and experience, clients today are comparing apples with oranges. Meaning, the perception of your service by your clients is colored not just how your firm compares to other law firms, but how your firm compares to other excellent experiences they have had with any service provider.

There has been a broadening of service expectations because people are so used to receiving data, communications and timely delivery of information about what they are buying.

For example, if I can get a quote to have my window fixed online, why can't my lawyer do the same? If I can track my pizza order on my phone, why can't I be kept up to date with my legal advice?

These are extreme examples to illustrate the sphere in which clients judge their experiences. We do not suggest lawyering is like a pizza delivery service – but the comparison tells us how clients have built up an expectation of what good service looks like.

Today, the firms that are doing well are not just focused on being the best lawyers they can be - they are focused on and recognized as offering the best service they can for their clients.

We can look at client experience as having three main pillars. These pillars are:

- Responsibility
- Consistency
- Prioritization



PILLAR ONE: RESPONSIBILITY

Who is responsible for client service and overall experience?



“Client experience is made up of hundreds of touchpoints throughout the client’s journey with your firm.”

However, the fact is no one person in your firm controls client experience in its entirety (or if they do, they represent a serious point of risk in that client relationship). Client experience is made up of hundreds of touchpoints throughout the client’s journey with your firm. Each interaction with any member of your team has the power to improve or detract from client experience, be it a positive or a negative experience. Unfortunately, a negative experience can often be more powerful than a positive experience. Therefore, it is a firm-wide endeavor to create positive client experiences. This is both terrifying and exciting for many firms!

If every person at your firm has some responsibility for client experience, it follows that you should include your teams in the conversation about service at all levels, roles and functions. Seek out your team’s perspectives on what great client experience looks like and how they can help deliver that. Different team members will have different kinds of interactions with your clients. They see things partners or management might not - some may be closer to operational frustrations and small service wins than others.

PILLAR TWO: CONSISTENCY

How do you ensure consistency of experiences and set expectations for the required levels of client service?

To ensure consistency of client experience, your staff must have clear expectations, you need to track and measure how you interact with your clients, and you must use technology to eliminate human error.

As leaders of the firm, what are your goals for client experience? What takes priority? Measurable metrics related to efficiency, communications, data accuracy, access to information or broader guidance related to engagement style will ensure your team know what is required in order to deliver great service and overall experiences for your clients.

These metrics can be established as documented service standards or commitments. Your team need to be trained on how to support these standards. Ideally, these are also shared with clients and prospects, so they also know what to expect.

How do you scale a consistently great client experience through automation?

Automation removes the reliance on human behavior, building it into repeated information mandated by your technology system. The goal is that no task or activity between you and your client will fall between the cracks.

Technology has the power to take many of these touchpoints and client service standards and automate them, so they don’t just exist as a line in the firm client service protocol or live in your practice manager’s head or get lost in human error.

Think about connecting all the aspects of your firm’s client activity – client intake, conflict check, matter set up, matter management, client data capture, document production, file storage, client relationship management, case-related communications, time tracking, billing, and accounting. They are all part of client experience.

Making sure these processes work together so that the client experience feels seamless and organized is the difference between great experiences and frustrated clients.



“Don’t just draw the dots, connect the dots.”



THE NEW NORMAL – LAW IS NOW DIGITAL

What is considered to be ‘good’ service changes over time. Expectations can evolve slowly or occasionally dramatically based on market factors or unexpected events.

Look no further than COVID-19 and the dramatic impact it had on law firms and their ability to work to their normal standards. It drove a ‘big bang’ of change in law firm innovation.

There is no doubt COVID-19 has accelerated the digitization of law – but it was always going to happen.

COVID-19 exposed just how reliant many law firms were on ‘human glue’ in their processes and client service. Once teams became dispersed, client data and client management processes had to be available to and followed by everyone on the team through technology to ensure consistency and oversight in relation to client experiences.

Gone are the days of:

- Conflict checks that required an IT resource to scour multiple data silos before matters could be opened.
- New client files that needed the finance team to set up client details in the billing system.
- Lead attorneys having to email their team for updates or confirmation of task completion.
- Client data being incorrectly represented on documents due to human re-keying.
- Paper review and written edits on lengthy documents.
- Lawyers dictating file notes for their secretaries to type up and add to a client file.
- Calls and emails from clients being notified via post-it notes on your screen and taking days to return.
- Retrospective allocations of billable time by different fee-earners.

All of these human interventions in day-to-day client processes led to delays, mistakes and dissatisfied clients.

These may have been accepted or smoothed over prior to COVID-19, when valuable relationship and service milestones included face-to-face meetings to connect with clients, group briefings on case status in the surrounds of a comfortable office, entertainment at nice restaurants, shows or sporting events, or even casual coffee catch-ups.

However, those options are no longer available to firms.

These kinds of experiences can no longer paper over the cracks of sub-par day-to-day client interactions.

To bring this to life practically, it is helpful to look at some examples of how practice management technology can help you change and improve the way clients interact with your firm and how your firm operates, resulting in exceptional client experiences and productivity improvements.

By systematizing aspects of your client journey within your technology, you and your team can deliver more consistent experiences. You do not need to tackle everything at once. There are obvious places to start at the majority of firms.

If your firm is looking for low-hanging fruit in order to start the evolution of client service and overall experience, the best places to start are with those repeatable everyday processes that touch clients the most. Identifying small gains in individual steps of a process can result in efficiency, communication and data quality that has an outsized impact for your clients.

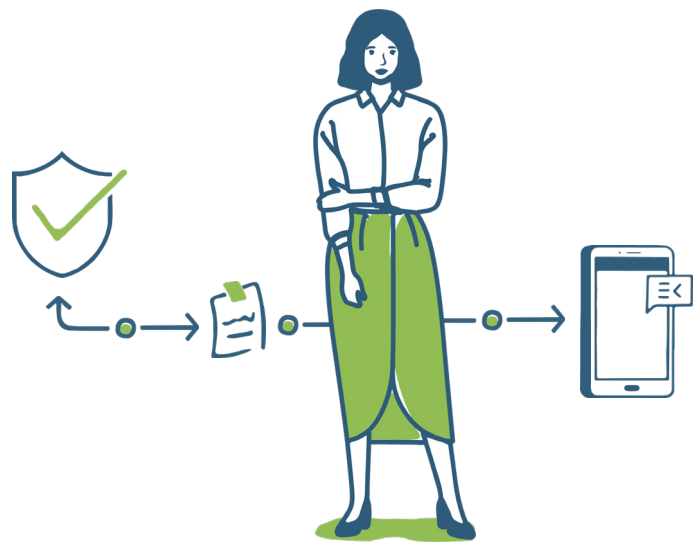
THE BIG BANG OF MODERNIZING LAW

Throughout 2020 law firms have had to quickly adopt technology to allow them to work from home and deliver legal services to the same, if not better, standards than before COVID-19. Firms who had already embraced modern software prior to COVID-19 did better throughout the pandemic than firms who had not. This business continuity or lack of it was obvious to law firm clients – they took note. Now that law firms have taken steps to be more digital, more flexible and more data-driven, it turns out clients really like it.

Clients enjoy the efficiency of bookings and calls over Zoom or Teams, they feel more engaged working in collaborative online spaces rather than reviewing paper copies in meeting rooms, they see the efficiency of automated information requests rather than having to re-write their details on various forms, they like knowing they can find updates on matter progress or having access to their files through digital

matter management tools (rather than waiting for an update call or having to call and ask regularly). Legal teams and firm management are getting insight into the health of their practices which they never had before based on the data being captured in their new, accessible software.

Clients (and staff) are going to continue to expect this new normal of digital law long after COVID-19 leaves us. Why? Because it is categorically better for everyone involved.



CONSTANT EVOLUTION – ONE STEP AT A TIME

Even without market influences of the magnitude of a global pandemic, there are so many possible marginal gains to be made along the client journey from initial consideration of your firm through matter execution, billing and even debriefing after the matter is concluded. Do not ‘set and forget’ client service – keep iterating and adding value to every client interaction.

For some, having to re-engineer their firm with new technology was a game-changing shift, however, in order to keep your firm keeping up with client expectations of modernization, constant evolution is required.

Not every change has to be ‘big bang’ – improving client service standards to meet expectations can start small. Not knowing where to start is not a good enough reason to do nothing. We see many firms simply start with one thing, improve it, measure results, learn from it and move onto the next thing they want to improve. They take a systematic approach, dealing with the issues they have identified as priorities one by one.

SMALL STEPS LEAD TO GREAT CHANGE OVER TIME

Many typical client interactions may seem on the fringe compared to higher-profile case and matter milestones. However, each of these have significant potential for positive client experience impact.

Consider adding standards of service to some of the following:

- How quickly a client gets a call back on an active case.
- How often clients are sent case updates without having to request them.
- How few/many data errors clients find on their documentation.
- How often clients have to re-supply data they have already shared with you or your team.
- The ease of access clients have to their case files.
- How long the phone rings or how often clients are put on hold at reception.
- How well-informed clients are in relation to important milestones, dates and deadlines.
- How detailed bills are, so clients know exactly what they are paying for (and aren’t surprised when they see the detail!).

The challenge is how you and your team keep up with client expectations for each of these touchpoints. We know that service expectations are getting higher all the time. And these are the experiences that drive your clients’ propensity to recommend or talk highly of your services.

How do you make sure every interaction and communication your client has with your firm adds up to exceptional client experiences? Using technology, you can be in control of every step of your client’s journey with your firm, without having to control every little thing.



PILLAR THREE: PRIORITISATION

Knowing that client experience is both a firm-wide endeavour and something that touches every step of the client journey, how do you know where to start? We suggest starting with your clients' feedback.

Even more valuable than team feedback about client experience is feedback from actual clients. As direct consumers of your services, they are best placed to provide actionable insights and identify the bottlenecks or points of friction in your processes that you may not otherwise have known existed.

Surveys, email feedback and/or quarterly client relationship calls can all provide insight that should be captured and considered. Feedback is not always good – but just asking for feedback is a positive first step. Don't bury negative feedback – you might not agree with it, but your client's opinion matters more than yours. Be transparent with your team because just knowing that issues exist is the first step to solving them. Something worth underlining is that once you solicit feedback from clients, it is really important to respond and tell your clients that you have listened and are taking their views on board.

Once you have the feedback you need to start making decisions about improvements to client experience, the next step is planning out how to put them into action - embedding them into your processes and culture. Because client experience is a firm-wide endeavour, any initiatives to improve it have to be supported by leadership and implemented through technology. Expectations of what good service looks like need to be communicated internally.

We see 3 areas that law firms typically tackle first in order to improve overall client experience:



Client Intake



Client Communications



Matter Management

CLIENT INTAKE

How you start an engagement - sets the tone for your clients' journey with your firm. Think of the key steps involved and how the process for each can be shortened, automated or improved with client experience in mind:

- Inquiry Forms
- Intake Process
- Required Data
- Conflict Check
- Matter/File Opening
- Engagement Letter

As firms look at some of these key aspects of client intake, there are questions each firm should consider in order to understand and improve client experience. Each firm will have different processes and therefore different things to investigate. However, looking at two of the most common areas requiring improvement from a client experience point of view – initial inquiries and conflict check.

Inquiry Handling:

- How easy is it for your prospects to get in touch with you?
- What information do you ask for up-front?
- Consider if this is all required information or a barrier for engagement
- How does this information flow through to your systems and get utilized in engagement letters or other documents?

Conflict Check:

- How long does conflict check take?
- What data or systems are involved in a conflict check?
- Does the process hold up matter/file opening processes?
- What are the bottlenecks?
- How frequently do you communicate with clients during these processes to let them know what the progress is or what is required?

The technology you have in place to support these processes should have the ability to automate and connect the steps involved in all these processes. For example: Data collected at inquiry should flow through to conflict check, a completed conflict check should trigger a file opening notification and an automated communication to update your client and tell them to expect an engagement letter. The final step of file opening could be the creation of an engagement letter, which is automatically drafted from a template using the pertinent information already gathered and on file. So far, no room for human error or delay.



MATTER MANAGEMENT

Once you have a matter file created there are many tools and functions within practice & matter management technology that support great client experience.

These should include:

- Tailored matter steps to suit your individual practice area processes.
- Document collaboration capabilities.
- Custom client data use.
- Task management.
- Automated client updates.
- Task, deadline and information requirement reminders.



However, whether you know it or not, how your firm manages matters is essentially your current workflow. You have a system (however organic) which your team follows to decide who does what, when documents get created, which templates are used, and at which points progress gets communicated with clients.

The term 'workflow' is used by technology providers to describe how a process or series of processes interplay to trigger next steps and tasks, or pull data from the system based on the requirements of these processes.

In an ideal world, your workflow should be supported and improved by your technology's workflow. It should adapt to your firm. Being able to customize the steps and activities and bake them into your matter management software. Meaning you can take care of your client work and client relationships at a consistently high level of quality.

Firms these days are spending far too much time and resources on the administration of a matter or case, rather than the work itself. What a practice and matter management system should do above all else is free up your team so they can do their best work - exceeding the expectations of your client.

Workflow is the key to transforming your law firm into an efficient business. You can create a unique set of steps and tasks for each matter type, automate each step to collect information, assign tasks, and make sure everything is checked off before moving to the next step. Delegate work to your staff with the assurance that everything will be done according to plan.

Two questions law firms typically ask in relation to matter management and workflow are:

- How do you know what your current matter workflow is?
- How do you make sure your clients are being taken care of throughout your matter process?

Only you can answer those questions for your firm, but here is how you find the answers: When a law firm adopts configurable matter management software, they first go through an exercise to map out the steps of the 'ideal' matter processes for different matter types. These mapped steps are used to build systematized, automated workflows into your chosen software.

With the right technology, each matter type should have a specific workflow to guide your staff through a series of steps. At each step, the workflow automates certain actions, tasks and notifications such as automated email updates, document creation from templates, or prompts to users/clients to enter required data at specific milestones.

This kind of automation within your workflow significantly increases the productivity and quality of work produced by your firm – creating consistency and improvements in the quality of work produced by your team, the timeliness of matter progression and in overall client care.



CLIENT COMMUNICATIONS

Clients like to hear from their legal teams. But it can be hard to stay on top of who needs a progress update or who needs a service check-in when you rely on manual lists, email traffic or nudges from your team.

Client communication is frequently referenced by clients and their legal teams as an area of frustration and inconsistency. Clients' expectations to be kept informed on case progress, timelines and billing status are high. We also hear from lawyers that the pressure to keep up with these expectations is a source of much stress. Marry that with daily communications back and forth to gather information and review documentation. The result is that client communication has become a significant administrative burden and isn't always factored into the core case or matter process (or fee quotations).

Using technology to automate and pre-empt communications as part of your matter workflow helps to take this administrative burden off your hands. In our experience, when legal teams use technology to satisfy their clients' need for progress updates and gather required information, clients are happier because they feel informed, cared for and organized.

Your practice management technology and broader tech environment should include a suite of communication tools including: automated communications, client collaboration tools, key communication tool integrations, templated documents & communications, secure client portal.



Automated Communications

Build communications into your practice management system workflow to automate much of the matter progress communications you normally do manually. Tools such as 'automatic email trigger' can use email templates and pull data from the matter file to notify your clients when a matter changes step automatically. Set tasks and reminders to ensure you or your team members check-in with clients at key milestones. Send SMS messages to make sure your clients know what's coming up.

Client Collaboration Tools

Law firms are typically using either Microsoft or Google products for document production, email, data capture and communications. The online version of these tools are excellent collaboration tools and should be used to reduce unnecessary communications about edits. For example, collaboratively reviewing documents with clients – where you can walk and talk them through the purpose of different clauses or language, will short-cut questions and emails back and forth.

Key Communication Tool Integrations

You face a daily productivity loss by jumping in and out of different programs and apps in order to complete legal work, manage clients, track time and keep files updated. Integrations between your suite of technology and tools will help you do more from the systems you are most familiar with. We all spend much of our days on email – being able to complete or push information to your practice management system from your inbox will keep your clients' files up to date in real-time and give you access to matter information without leaving your inbox.

Templated Documents & Communications

Often you find yourself writing similar emails to different clients and re-using prior documents. Building repeatable content into templates not only saves you countless hours each week reinventing the wheel, but also ensures you deliver accurate and high-quality emails and documents each time. Your templates suite should be configurable so you can edit them or create new ones as required. Templates should automatically pull the right information from your matter into the corresponding field within the template – eliminating room for error. If the data is right, the document will be right.

Secure Client Portal

To take even more email traffic out of your inbox, look for software that includes secure client portals (sometimes called spaces or data rooms). These are password-protected portals where your client's most up to date documents and updates can be stored and downloaded. Portals should have permission settings to manage who can access different files within the portal. Each time a document has been uploaded or updated in the portal, users will get notified by email. Having one place for your clients to find out about their matter makes sure they are informed and gives them a sense of being in control. No need for emailing the latest document versions back and forth.





If you are interested in finding out how technology can help your firm & its client's or want to discuss any of the topics raised in this whitepaper our team would love to hear from you. Simply email sales@actionstep.com or visit our website listed below.

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