

AN ATTORNEY'S GUIDE

The New Virtual Client Experience: How Law Firms Must Adapt

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 mycase

When law firms engage questions about the law firm client experience, it's often the case that those discussions are pretty one-sided. That's because law firm managers never address the ultimate question, of how they can make the law firm client's experience easier, more frictionless; quite the opposite: law firms always want to know how they can make the client experience easier on themselves. That's why law practice management technology is so appealing to law firms, because it carries with it the promise of reduced effort.



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The Road to a Modern Client Experience

Imagine: getting more work done in less time, doing more with less. That's nirvana for the small business owner. And, it's also true: technology can reduce effort, while multiplying effects. Sometimes, though, providing a first-class client experience is not about reducing effort, but focusing it. Consider, for a moment, if Disney asked its Imagineers: how can we make this whole customer service thing easier for us, rather than focusing on the guest. Well, Space Mountain would probably suck. And, more to the point -- Disney would not have become a global economic force, with a century-long track record of being one of the most consumer-friendly institutions in the world. Disney can print money in large part because they treat their consumers like gold. Law firms, generally, do not. And, while you're not necessarily seeking to establish a global conglomerate, the Disney thesis, writ small, can provide you with a massive competitive advantage over the law firms in your market area.

As the world has become unstrung at the outset of 2020, law firms have been required to pivot in a way that has largely been uncomfortable for them. Making sweeping technology changes in a truncated fashion was never going to have an optimal outcome for the legal industry, as it was situated at the end of 2019. But, like Disney with shuttered theme parks, law firms, too, need to find a way to innovate. In our new normal, legal consumers expect and require an online experience, across the board—even if they won't need it for the full scope of the attorney-client relationship, the opportunity to access it, as quarantine orders rise and fall, is now a necessity.

It is incumbent upon law firms to recreate analog processes as digital ones. Anything that you could do in-person, you must now be able to do online, and in a way that still furthers and deepens the attorney-client relationship, and attenuates lead management and conversion. It's not an easy task; but, it's not an impossible task, either. And, it starts with developing a modern client experience for law firm clients.

These are the 5 principles you should use to reformat your client engagement model for an entirely new environment.

Engage

Engagement is the key to making modern legal consumers feel comfortable about working with a law firm. And, that's true at any stage of the client lifecycle, whether you're seeking to convert a lead at the intake stage, better manage your relationship with an existing client or provide a former client with the appropriate prompt to send a referral your way. In each case, the principle remains the same (you must effectuate ways to stay in touch with legal consumers that relate back to their present need), even if the methods may differ. In this section, we'll talk about how you should address legal consumers at each point of their involvement with your law firm.

Intake Management

If law firms fall flat on their faces in terms of legal consumer engagement, they fall the flattest at the intake stage. Law firms aren't just bad at intake, they usually have no intake process to speak of. But, in the legal vertical, having an intake process is almost meaningless if it is not focused on engagement. Studies and experience clearly show that potential law firm clients are far more likely to become actual law firm clients when law firms establish intake systems built on engagement. Engaging clients means that you may even be able to lock in potential leads, with the chance to convert them, before they ever begin to look at other options. Data indicates that almost 90% of the time, a lead that is truly engaged by a law firm will decide whether or not to hire said law firm before contacting the next one. That's a huge competitive advantage; but, it also underscores the need for a law firm to understand what engagement is, in this context, as well as how to effectuate it.

In essence, it is the answer to the question of whether you can create a conversational interface with your potential client. Notice my use of the word 'interface'—that's because most lawyers view conversations as having to take place between one person and another—even if that's not always the case. Certainly, there are some law firms that will



focus on lawyer-consumer or staff-consumer conversations. In fact, there are law firms that are so focused on the consumer experience that they require attorneys to facilitate intake conversations. That's, no doubt, extremely appealing to legal consumers, and will up your law firm's conversion rate on new clients by a wide margin. Of course, it's not realistic for every law firm, especially smaller law firms.

Even the use of law firm staff for intake can be difficult to manage: paralegals and secretaries have important roles on the substantive practice side of law firms, and taking them away from those roles to put them on intake can seem a whole lot like robbing Peter to pay Paul. And, if that sounds like it would be the case for your law firm, using technology, potentially supported by vendor or contract staff, may be the best way to replicate that conversational environment, while reducing the cost of providing it. That's why virtual receptionist services, live chat and chatbot services are becoming so popular for law firms—because it's a way to have conversations with legal consumers, at a fraction of the cost.

But, don't go too far down the technology-aided rabbit hole. Remember that what works is conversation. So, asking leads to drop information into a contact form, or to leave a voicemail message: that's not super compelling. Even if you can't have in-person conversations anymore, developing phone- and video conferencing-based analogues can meet the need.

Client Management

Lawyers are mostly so head-down on cases that they only lift up their heads when they have a substantive update for clients. That's great, and all. But, it's also important to stay in touch with your clients when nothing at all is happening on a case, which is what is going on the vast majority of the time. Lawyers, again, have a hard time placing themselves in the shoes of their clients; so, they're not often thinking about what it would be like for someone to not be a lawyer, and to be involved in the legal process—in many cases, your client's only experience with the law (like, for their entire life) will be with you. And, if you're a legal consumer, prosecuting your only legal case for all-time with a lawyer who hasn't done a particularly sterling job of explaining the legal process to you, and then is calling you for the first time nine months after he retained you with some information about the effect of an arcane statute on your case . . . well, you'd be confused, too. Not only that, you'd probably also feel like your lawyer is only interested in your case, and what you can pay him for, and not in you, personally.

Now, think of every other engagement that that consumer has in her life, and about how much more instantaneous (you buy something from Amazon, and get a receipt and delivery information via email, right away), then constant (you get consistent updates until the goods arrive), then personal (Amazon recommends additional purchases based on your browsing history) it is; then, think about how far away from that norm law firm customer service sits. So, as a law firm, you have to find a way to make sure that your client feels cared for—because everyone else is doing it, in every other industry. They all had a leg-up before the pandemic; and, those differences are only now more obvious.

What that means is that you need to check in (just like Amazon does), on a regular basis, even if nothing particularly Earth-shattering is happening at that moment. So, for a law firm, it's important to schedule regular check-ins with clients, that aren't case status

updates. The easiest thing to do is to schedule a recurring check-in email or phone call. It can be as simple as asking how the client is, and that's it. You can ask about the client's daughter's softball team, whatever. It's all about staying in touch. Nothing makes a client feel more cared for than when you are not touching base to treat them as a commodity: here's something that's happened with your case/I need information about your case/I need money. Just ask about them, on a personal level, and leave it at. With an obviously open-ended communication valve of that sort, it's also more likely that the clients will reach out directly (and proactively), if something case-related does come up. That's what we call a win-win.



Post-Client Communications

Since lawyers are so hyper-focused on doing good work for clients, they ignore everything outside of substantive case updates. So, when the case is closed, it's no surprise that a lawyer's desire to communicate with the (now-former) client dies with it. Certainly, this has to do with the lack of substantive updates; but, it is also related to the fact that former clients are not direct revenue sources for law firms—which ignores the fact that more referrals generate from past clients than any other sources. That's a pretty darn good source of indirect revenue.

For law firms that want to generate those referrals from past clients, there has to be reliance on more than just hope that they'll remember the positive experience they had with your law firm. Like everyone else, your former law firm clients are inundated with information about products and services on a daily basis, and the notion that they will immediately come up with your contact information when a potential referral presents to them is foolhardy at best. You even need to engage these former clients, by figuring out a way to get their attention consistently, even when there are no more substantive case updates to provide.

But, there's no rule that says you can't call to catch up with a former client; and, maybe it's not an every six-week cycle—like the one you should apply for existing clients—but, catching up every six months via phone is better than never doing so. You could also invite past clients to your office holiday party—just as you would other referral sources. If you're using an email marketing tool to engage existing clients and other referral sources, curate a list of former clients, too—and, craft regular content that is particularly useful for them. Don't forget to ask for referrals consistently, too. No one's going to know you need them, or want them, unless you're explicit about it.

Monitor

Now, for something you'll really enjoy: Yes, you're right . . . your clients do want information about their cases. Potential law firm clients make their choice about the lawyer they want to hire in part based on that lawyer's explanation of the legal process in relation to their particular case. Of course, then it's the lawyer's job to follow-through on managing that process. But, clients will then want to monitor case progress on their own, too—which is a natural inclination for a consumer invested deeply in understanding more about a legal process they have very little understanding of in the first place. Clients certainly have financial and personal interests in their own cases; but, the result is surely not the only thing they care about—even if sometimes attorneys wish it could be. Law firm clients are into the journey, not just the destination.

Fortify Client Relationships With Software

Modern consumers want to know about what is happening on their cases, yes; and, they want you to tell them about it, sure; but, they also want access to their own data, on their own time, as well. The first part of that conversation is relatively easy for lawyers. Law firms are good at updating clients about substantive events related to their matters. And now, with the advent of modern law practice management technology, that process becomes even easier. With synced calendars, and the ability to create workflows tied to specific case types, matters almost run themselves. This makes it easier for law firms to delegate, and to manage staff more effectively, without having to 'manage by walking around', or resorting to micromanaging—and, this is especially true in the now-persistent distributed work environment.



But, in addition to easing the burden of staff management in the new normal, this is also a great way to keep clients informed, by publishing certain updates. If a staff member completes a task in a workflow, the client on that particular case can be updated automatically, in real-time; transport a law firm client from 1995 to the present day, and that's like real-life magic. And, because client updates can be managed seamlessly by software, in an automated fashion, it frees up attorneys to have more of those generic conversations that flesh out a representation and generate goodwill. This is the perfect example of how law firm technology can support best business practices, by automating workflows to allow lawyers to execute a personal touch in client management— even when they're not sitting in front of clients.

Of course, that same software tool can serve to highlight client agency in their own legal cases. Modern businesses have the technology stacks available to allow them to be transparent and open about what they do, which increases the trust level that customers invest in the businesses they work with. And, the same is true for lawyers and law firms. While many attorneys think the opposite situation applies, it is far better to increase your clients' understanding of the legal process, because it serves to cement your expertise, not to reduce your client's reliance upon it. Just like your law firm client should be aware of the substantive updates on her case, she should also be able to access real-time case documents, comment on those, and ask questions about them.

The more complex your client's understanding of the legal process, the more they will come to respect your acumen; the more questions they ask, the more opportunities you have to solidify your brilliance, in their minds. Opening up as much case material as you can via a modern law firm client portal improves the attorney-client relationship; and, it is a much better arrangement for modern clients than for those old school law firm clients who have traditionally had to stand behind a veil of complexity drawn by fragile attorneys who were feverishly operating controls like the Wizard of Oz exposed by Toto. Remember, even if you detail every minute aspect of the process governing a client's case, they will still want to hire: because they don't want to do it themselves—even if that doesn't change the fact that they want to know all about it. I may know how to butcher a pig—but, I probably still want to buy my bacon from a grocery store.

Update

It is important to keep clients abreast of changes in their cases, as well as to reach out to clients directly from time-to-time, in order to show that the lawyers at a firm care about more than just the bottom line of bringing cases to resolution and clearing fees. Of course, establishing regular and consistent updates about the law firm's areas of expertise is essential for developing a vibrant marketing profile. Reminding clients and former clients of a law firm's focus and expertise generates referrals and other potentially useful content, specifically reviews. How to manage that effectively, without spending all of one's time marketing, is the challenge.



Content Marketing

Fortunately, a favorable method for law firm marketing can be turned toward client updates very easily. The cheapest way to effectively market a law firm in this day and age is by leaning on content marketing. Content marketing is exactly what it sounds like: it's generating content and disseminating it widely. If lawyers focus on drafting short content pieces focused on their areas of expertise, it will help in search rankings, and also in providing clients specific information related to their legal needs. If you can develop content around your clients' top ten questions that they have for you, it's hard to do this wrong. And, the good thing is that there are

more content options available than ever before. Want to write? Start blogging. Wait, you don't like to write? Do a podcast. Like to talk, but want people to see your face? Video sounds like a good solution. Like to take pictures on your smartphone? Hey, Instagram is where all the cool kids are.

The Omnichannel Approach

Modern law firm marketing needs to favor an omnichannel approach (be on as many platforms as possible, because you can never tell which any potential lead or client prefers); so, the biggest challenge for law firms is monitoring and managing all those channels. Because it's very difficult to toggle between lots of social media channels to post updates, tools like Hootsuite, Buffer and RavenTools, are essential, because they allow you to access multiple social media channels, and to schedule updates, via a single platform. Scheduling posts, in particular, is the best way to avoid the deep, Alice in Wonderland-level rabbit hole that is social media.

And, because the definition of 'social' in social media is ever-changing, don't forget about those e-newsletters. That's another great way to keep your contacts (leads, clients, former clients, referral sources, colleagues) abreast of what you're doing, in regular cadence. If the engagement on a channel like that is a new case referral, you better believe that's 'social' enough for most law firms.

It's important to keep clients invested in what you do, at all levels: what you do specifically for them, and what you can do for potential clients that they might refer you. Making sure that anyone who could use your legal services (now and in the future) is consistently aware of what you do, is probably Job 1 for the law firm marketer.

Charge

Your pricing mechanisms also have a significant effect on the client experience, including whether potential clients choose to access your services in the first place. And, the key to pricing legal services for modern law firm consumers is all about understanding how other businesses interact with consumers. Law firms don't place themselves in the shoes of their clients, it's true. But, law firm managers also often fail to understand the effect that other businesses have on setting the expectation level for legal consumers. If I can buy a Disney+ subscription for less than \$7 per month, and have access to the vast majority of that company's content catalogue, immediately, then how am I going to feel as a consumer when my law charges me several thousand dollars upfront for a retainer, and then I don't hear from them again until nine months later? Answer: Not great, Bob!

Cost Certainty

Modern law firm clients expect the same thing from you that they expect from every other modern business: a clear value prop and cost certainty. The question is whether you're providing it? If you're charging clients using traditional methods, you're probably not. Consider how frictionless your process is, and whether you can identify the total cost of your representation. If you're asking your clients to get you cashier's checks, and avoiding the use of epayments, then you're doing both them and you a disservice, especially in the current environment: instead, make their lives easier, and allow them to set up their own payment plan for legal services by using a credit card, rather than stacking up your accounts receivable to the ceiling, when you have to collect on more checks, for work already performed.

If you can't quote a price certain for legal representation outside of saying that you charge a high hourly fee until the work is done, perhaps it's time to start considering taking a stab at flat fees, or limited scope representation, or subscription legal services, or even selling products; even if you don't, it makes sense to create a more refined pitch



for your services, one that better approximates the total cost of services. Regardless of how your law firm mixes and matches pricing options, you would be well-served to address the gap between law firm pricing and pricing for other consumer services, with a concerted effort to reduce the space of that gap, rather than widening it.

If step one for better appealing to modern legal consumers is creating more genuine engagement, step two (which is really the stage at which the deal is closed) is offering those same consumers something other than the traditional law firm pricing model: presumed by most of the general public to be defined by high hourly rates, with no end in sight.

Measure

The legal vertical is one of the last to adopt data as a decision-making metric. In the main, law firm managers still act on their gut feeling, making ad hoc decisions that may have little actual relevance to the reality of their law practices. This is true of law practice in general, but also of client management, in particular.

Those lawyers who make data-based decisions are generally more effective decision-makers than those who are just guessing based on assumptions they make that may or may not be true. Data reveals truth. And, data is available for clients and client behaviors. Also remember that, as a managing law firm attorney, you do have the ability to do something heretofore undone in the legal field, which is to just directly ask your clients how they feel about you, and gain some insight into their view of your law practice—direct from the horse’s mouth, as it were.

Many softwares available to law firms are capable of generating both surveys and the reports that render the results of those surveys; and, more and more software tools are building in marketing-facing tools. Your law firm can take advantage of that in order to measure your clients’ pleasure (or displeasure) with your law firm; in either case, you’ll have a better understanding about which side of that line you stand on, and can then make efforts to improve your standing: from bad to good, or from good to better. Software you’re already using likely has client survey tools, and the reports to leverage same. So, it’s time to maximize your use of those systems by engaging features you’ve not used before.

You can also measure your clients’ satisfaction with you by using a key performance indicator (KPI), like net promoter score (NPS), which is a measure of how likely your client group is to recommend your services. Having an answer to that pointed a question means a lot to your law firm, and may also spur additional benefits, including a pathway to generating more client reviews online, and a process for managing same. The plain truth is that the more you can measure about your clients’ behavior, the greater the advantage you have over your competitors, who, when they’re not itching their bellies, are making more bad guesses about the modern legal consumers they don’t fundamentally understand.



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