

A guide to providing quality client service for the modern law firm

How to exceed client expectations and the tools you need to be successful.



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Introduction

The biggest challenge facing SME law firms in the next 12 months is effectively managing client communications and expectations. 59% of those surveyed foresee client management as their key daily operational challenge above improving profitability, staying compliant, and improving firm-wide visibility. Therefore, it's crucial practices look to implement the right client-focused mindset and digital tools to help overcome these challenges to stay competitive.

Client's expectations have continued to increase, especially after the pandemic proved managing cases digitally to be difficult. It's time for the legal sector to provide modern and convenient services for clients to feel in control. It's the quality of your client service that will help you win more five-star reviews and recommendations and so, focusing on providing an efficient, easy, and stress-free experience has never been more important.

We've put together this guide to help modern law firms overcome their client management challenges and effectively deliver an exceptional client experience that'll help you stand out from the crowd. We cover why client expectations are changing and how to exceed those, including utilising digital tools that enhance your service whilst also improving profitability - a win-win for all parties.

The importance of **quality client service** to your long term success

Clients have high expectations of the legal services you provide, so it's vitally important that law firms have the technology and software solutions in place to deliver a seamless, cost-effective, digital experience that removes friction from their clients' journey.

Your average consumer does not have the qualifications or knowledge to understand the complexities of the legal services you provide. They will not know if you've utilised every area of the law to win / progress their case, or whether another lawyer could have done a better job. But they do understand what quality customer service looks like, and that's how they will value the services you deliver.

In the case of law firms, and many other professional services, the benchmark for quality customer service is set incredibly high. Every day, your clients experience exceptional service from brands who are pushing the boundaries of what it means to be client centric. Market-leaders are removing pain points for clients

that they had previously learnt to accept and therefore emphasising what it means to go above and beyond for your customer.

Online retailers, food delivery services, insurance companies, banks, and energy providers now typically offer instant online chat services, secure online portals, transparent pricing, and service information online and real-time text or email update alerts. This type of digital service is exactly what your clients are comparing your services against. So, if you still require wet signatures or are sending physical letters in the post or are not offering regular case updates then your services will be seen as outdated and inconvenient.



How to **exceed** client expectations

With the bar set so high for law firms to deliver exceptional customer service, it can feel overwhelming to know how to implement the right strategies to improve client satisfaction. But the answer is simple, remove the friction from your clients' experience.

The reason why client centric brands are loved world-wide is because they make it easy and enjoyable for customers to use their service. They've removed the pain points from their services, making customers want to return for the experience, which can often be prioritised above price. This means you need to identify all the ways your customer interacts with your firm and review how easy the process is. Can you eliminate waiting times, or increase the channels of communication, improve transparency, or answer their questions sooner?

Clients, above all, just want a stress-free and easy experience. And as most clients - when using your services - are in a period of change or in a vulnerable situation, it's the little things that matter and those personal touches that help to keep client's calm and feeling in control.

Evidencing quality customer service is now more important than ever as clients have more options to choose from. According to the Legal Services Consumer Panel survey, clients are now more prepared to shop around than previously and 80% of people surveyed said reputation was the top factor considered when choosing a lawyer. This means that good reviews, quality recommendations, and referrals are the key to winning new business and building relationships. It's impossible to keep on top of all the moving parts of a law firm manually, so taking advantage of digital tools and technology solutions that help to streamline and automate processes is crucial for success.



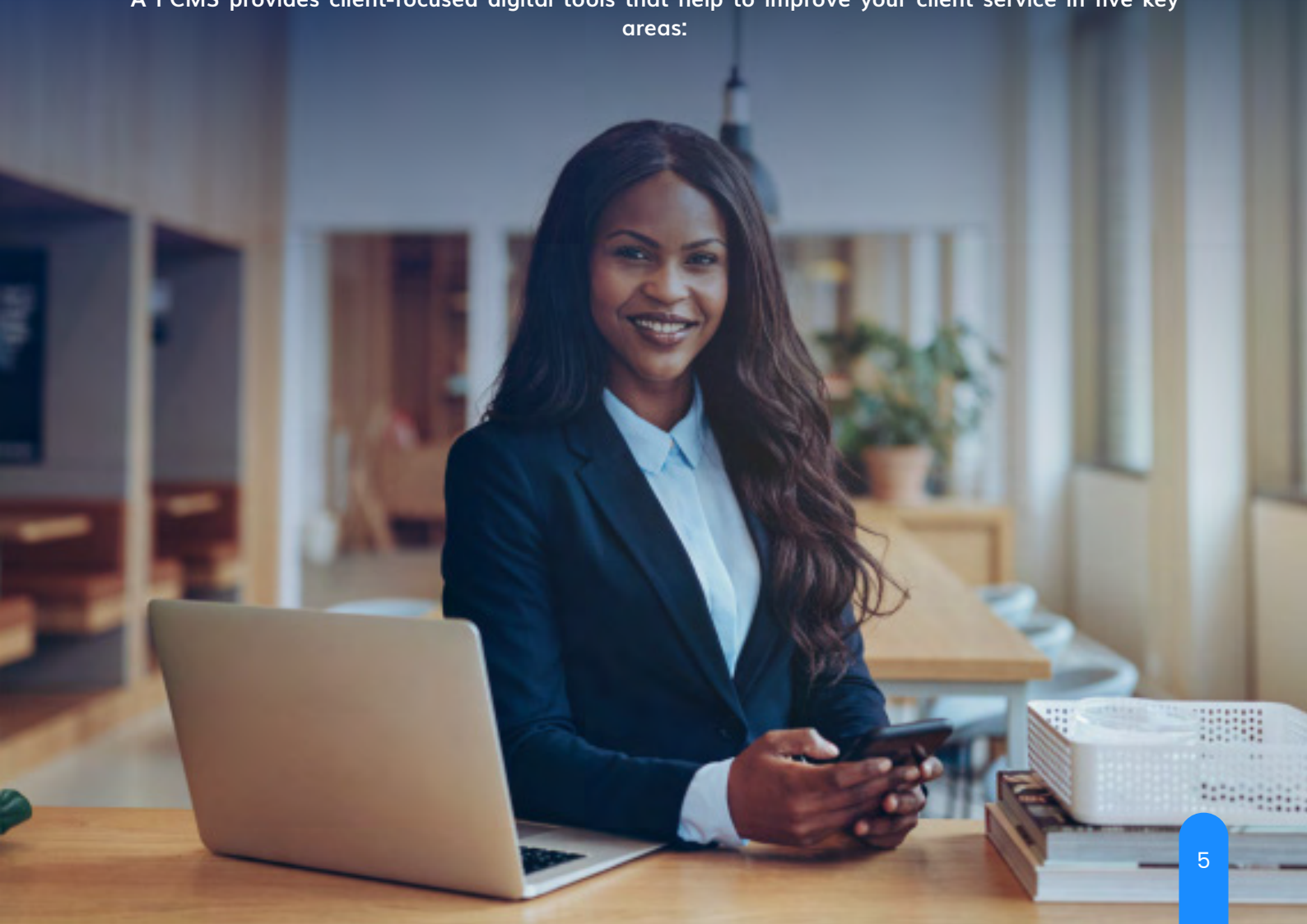
Stat. 2021 Survey - www.legalservicesconsumerpanel.org.uk

How legal **practice & case management software** improves your client service

The key to effective and efficient client service is connected data and processes. Without a centralised and integrated platform to manage your firm it's impossible to implement effective daily habits that enable you to manage clients successfully. Lack of visibility, data held across disparate system and disconnected processes prohibits effective and communication, which slows down case progression and effects service quality.

All these challenges and more result in inefficient teams, which inevitably reflects as ineffective client service. An all-in-one practice and case management solution (PMS) provides a centralised platform to complete your firm's daily operations. The software helps to ensure accurate data, productive employees, and enhanced client service.

A PCMS provides client-focused digital tools that help to improve your client service in five key areas:



Security

Firms are trusted with endless confidential documents and data, which is stored securely in your case management solution. But when that data or documents are shared via email or in the post, you're losing that security and relying on other infrastructures to ensure the safety of your files.

A secure web portal or app enables you, your client, and third parties to upload, share and sign documents without those risks. The portal becomes an extension of your case management system so the encryptions, cyber security and data policies that secures your CMS are also protecting your web portal and the data you hold in there. This reduces risk of hackers or external parties accessing or using your information without permission.

Convenience

A web portal provides your clients with a self-Proving an easy to follow, convenient process is the number one way to improve the client experience. The numerous features within a PCMS empowers employees with the tools they need to offer a quality and efficient service.

Providing real-time case updates without clients needing to chase is easy with a web portal or mobile app. A centralised platform to access documents, reports, and contracts helps to streamline case management for clients. Offering electronic signatures removes the need to print, scan, or post letters and so clients can review and sign documents from any device. Automated workflows enable you to reduce manual admin and speed up processes so you can provide a timelier service. And serving your clients digitally, as well as from your offices, provides options to the client so they can be self-sufficient if that suits, or visit for a more hand-on experience.

Collaboration

A centralised location for documents, data, communications, and updates makes accessing and collaborating much easier for all parties. Without needing to scroll back through endless emails, or physically visit the office, clients can view and comment on files from any device. This is not only easier but helps speed up case progression helping reduce the time from file open to file close. The same is true for the internal team; support staff can easily access case details if a client was to phone in or visit the office in their primary contact was unavailable, helping to offer a more personalised and organised service.

Adaptability & scalability

Remote working and online services have increased the reach of your firm beyond your local town, helping you to win more business and attract the best talent from across the country. This means, your clients, and potentially your staff, are now less likely to be local to your office, so providing digital onboarding, case management and client portal features helps you drive your firm forward. You no longer have to be restricted by your physical location or paper documents; cloud based PCMS free up firms to manage cases and clients from any location.

Reputation

Reviews, word-of-mouth recommendations, and referrals are the lifeblood of any law firm. Providing a client-first, convenient service is going to be the reason why people recommend you and return. PCMS enables you to offer the efficient and quality service that clients now expect. Logging into portals has become the norm for us in our personal lives; we access our bank, insurance, bills and much more online and so the expectation of legal processes are now the same. When you can offer a solution to your clients that makes their lives easier, and you'll be rewarded with referrals and positive reviews.

Client-focused practice & case management features

To ensure your PCMS is successful in enhancing your clients' experience, make sure that your solution has these features or can offer these services:



Client web portal & app

The cornerstone of all client-facing technology in the legal sector is to bridge the gap between solicitor and client with a portal or app. These self-service solutions provide a platform for your clients to stay on track and in control of their case, helping to reduce stress and provide convenience. Without a centralised platform to connect, share, and collaborate, it'll be impossible to provide the transparent, efficient, digital, and flexible service clients want.



Document sharing & collaboration

A platform, that isn't just your inbox, that makes it easy to share, view and locate documents, no matter their file type or date sent. Client portals make it easy to stay organised and helps clients stay in control of all moving parts of the case.



e-Signature

Always offer e-signatures so agreements and contracts can be signed from anywhere, anytime. Legal software solutions should always integrate with platforms like DocuSign to help increase the convenience for your clients. Watch your signed agreements be returned to you in minutes instead of days.



Data capture

Just like sharing documents, sending confidential data via email is also a security risk. Providing a self-service online questionnaire protects clients and ensures a centralised location for all matter details. Plus, you gain improved visibility on what the client has or hasn't provided yet, enabling you to easily chase or request additional information.

Case progression updates

The biggest inconvenience for both clients and lawyers is phone call chases. Imagine reducing your daily calls by even one per client, per day. Sharing updates straight from your case management solution via a client portal, email or text message saves you time and effort and means your client has up to date, accurate information. The best client portal software also lets you schedule tasks and key date reminders too, so clients know when they need to supply a document, a signature, their details, or evidence.

Digital IDs and AML checks

Offering a digital client onboarding experience enables clients to easily onboard from any location without the physical ties and restrictions of visiting the office or posting information. Digital identity and money laundering checks is a convenient way to gain the data you need without restrictions. Find a PCMS that integrates with those services to help speed up the onboarding processes.

Automated workflows

Improving efficiencies internally will inevitably affect the level of service you can provide. Speeding up, streamlining, and standardising your processes using workflows helps to improve the consistency, accuracy, and quality of your service. Workflows help to ensure quality, reduces errors, improves compliance, and removes manual admin and workloads.



How to implement a client-focused mindset and effective habits

The effectiveness of your law firm relies almost entirely on the daily habits of your team. The habits you repeatedly decide to do forms your business reputation, impacts your long-term success and if you'll reach your goals. Regardless of your goals, running a successful business involves mastering the basics and adopting habits that help you stay relevant and competitive.

Improving the effectiveness of your firm requires breaking down your current processes and identifying areas of improvements that enable you to better align with your goals and requirements. Without good operational, compliance, and client service habits in place, legal professional are inflicting unnecessary barriers on themselves.

To set your firm up for success you need to create the right environment that enables effective habits to flourish. The right environment requires four things: aligned goals, accountability, effective tools, and the right mindset.

Implementing a client-focused mindset is one of the [four fundamental mindsets](#) needed to be a successful modern law firm. If a top-level goal for your business is to deliver excellent client service, this needs to be effectively communicated and backed up by the actions taken in your team.

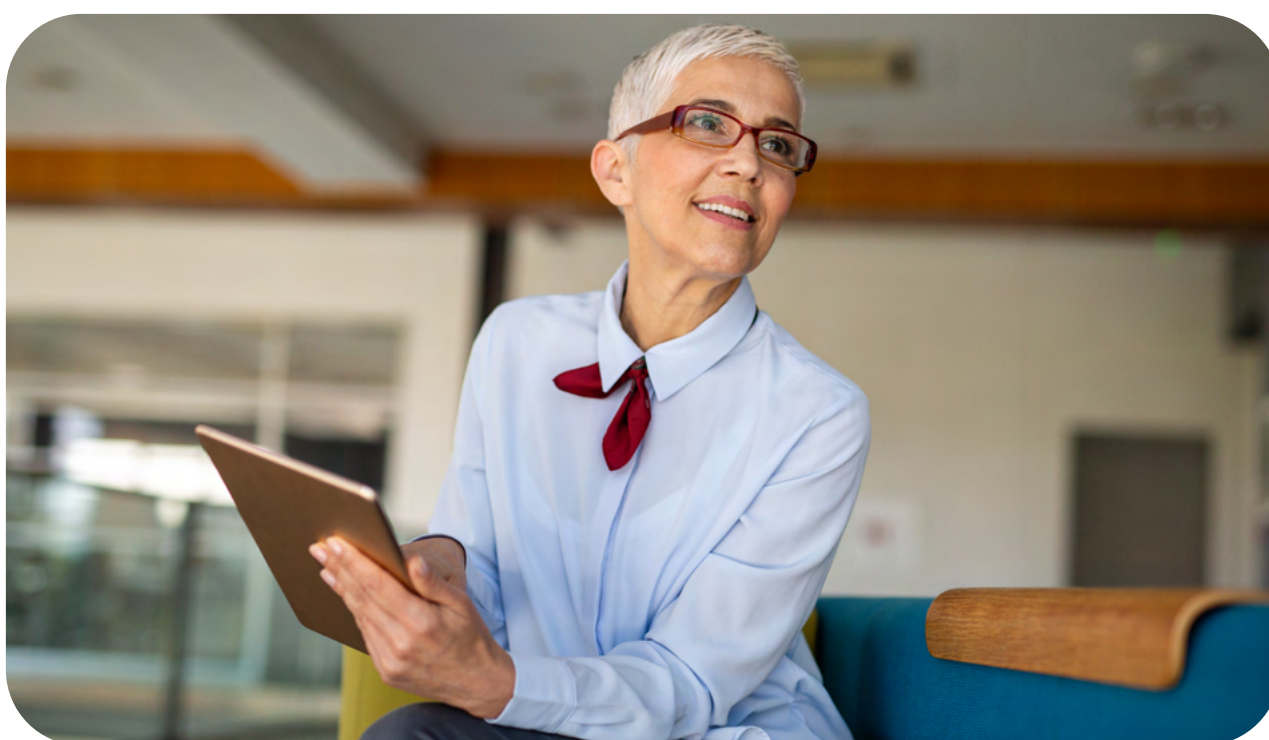
With the goal outlined, it's important the mindset reflects this by doing what's best for the client, not what is going to exceed sales revenue targets. With that mindset in place, set targets that reflects those efforts like improving ratings or increasing reviews. With the targets in place, it's then important to empower your team with the right digital tools to make those improvements to service, like increasing efficiencies with workflows, improving

transparency with text messaging, or sending instant updates via a portal.

When you have the right environment set up it'll become easier to implement and stick to the client-focused habits and processes that deliver the kind of service expected by clients.



Effectively manage client communications and expectations



Utilising the right practice and case management solution can enhance your quality of service and make you more efficient and profitable too.

As client expectations continue to grow higher, exceptional client-focused services is going to be the key decider in whether you're chosen above the competition.

It's your duty to ensure your clients' data is secure and that you effectively communicate during the case. Implementing a PCMS with the right client-focused features – such as client portals and apps, automated workflows, integrated text messaging and more - will make capturing data, sharing updates, and sending documents safer, easier, more cost-effective, but importantly, convenient for your client.

[View client portal software](#)

[Book a demo](#)



Transform your firm

The complete Osprey Approach solution combines comprehensive case management, powerful practice management, legal accounting and a secure web portal, so your firm can run a streamlined and profitable operation that exceeds client expectations.

Save time, reduce costs and stay compliant.

Get in touch to find out how Osprey Approach can future-proof your firm.

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