

A law firms guide to implementing a client portal

How to deliver quality client service and improve profitability



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Introduction

Legal software solutions are designed around features and functionality that benefit a firm. Fee earners are tasked with driving long term efficiencies, increasing billable hours and onboarding new clients, all to increase profits for the firm. This is why legal tech looks to reduce manual admin, increase productivity and introduce automations in order to help users maximise their time.

But often the most important part of the firm's success is overlooked – the client. Increasing efficiencies to improve profitability is crucial for the success of a firm but without clients, there's no one to deliver your efficient services to. However, priorities are starting to shift as firms begin to realise the impact that providing a convenient and seamless client experience can have on winning new business, improving competitiveness, and increasing long term profitability. The majority of respondents in [LPMs 2022 Frontiers](#) report cited customer relationship, client onboarding, or client experience software as the next technology project their firm will be investing in.

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.



What is your law firm competing against?

Instant online chats that offer immediate support and guidance. Access to transparent pricing, services, and products online so consumers can complete their own research and comparisons. Continuous and real-time progression updates – via text, email, and / or an online account – so they're kept up to date when purchases have been dispatched, are on route or have been delivered.

And it isn't just online retailers that have drastically improved their services. Online forms, digital documents and e-signatures that avoid the annoyance of printing, scanning, and posting are standard for most insurance companies, banks, building societies and energy providers.

This is highlighted further during property transactions. Consumers can research, book, and enquire online, including having virtual tools via the likes of Zoopla and Rightmove, but then typically wait to receive a client care letter in the post to sign and return from their conveyancer.



Instant messaging



Real-time updates



Transparency



Digital documentation



Secure online portals

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.

The number one way your firm can deliver unrivalled client service is by offering a secure client portal. A centralised hub that enables you to deliver client-centred services that also effects your bottom-line. The rest of this guide covers everything you need to know about why you should implement a client portal, the key features you need to look out for, and advice on successfully implementing one into your firm.



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

Why client portal software is the future for law firms

Implementing a client portal benefits your client, your productivity and your firm's profitability.

Client convenience

A web portal provides your clients with a self-service platform that enables them access to case updates, documents, and next stage tasks 24/7. Without needing to call or email their lawyer, they can log on securely and access or send the information they need without hassle. When all case details are centralised in one platform, your client can feel confident that they have all they need and that progressing the case will not require additional printing, posting, chasing or visiting the office.

A client portal enables you to offer your clients a convenient service that helps make legal processes and procedures easier to handle – the ultimate goal for all parties involved.

Easy 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.

Security

Client expectations are at an all-time high – they expect transparency and quick response times. 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 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.

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 and client portal features helps you drive your firm forward. You no longer have to be restricted by your physical location or paper documents; client portals free up firms to manage cases and clients from any location.

Reputation

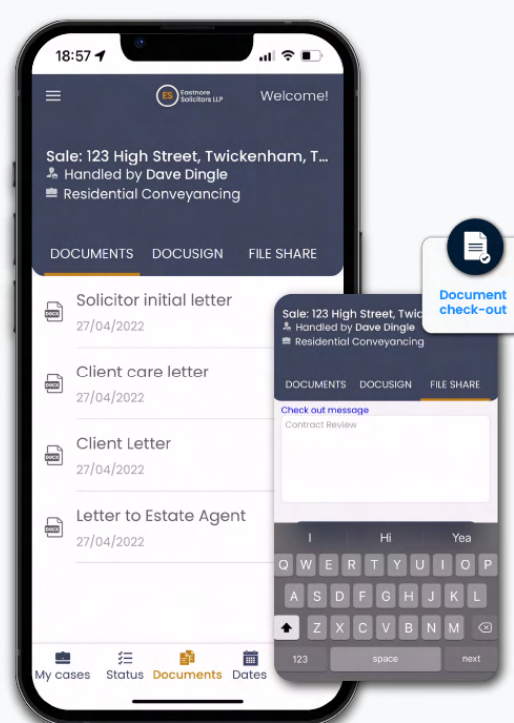
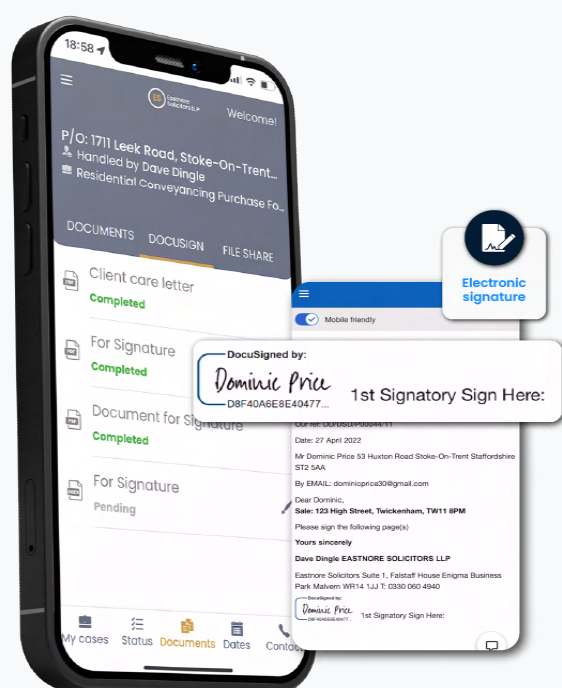
Reviews, word-of-mouth recommendations and referrals are the lifeblood of any law firm. Providing a client-first, convenient service is going to be the reason why people recommend you and return. A client portal enables you to offer efficient and quality service that clients now expect. Logging into 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.

Key features of client portal software

To ensure your client portal is successful in enhancing your clients' experience, make sure that your new client portal has the features listed here:

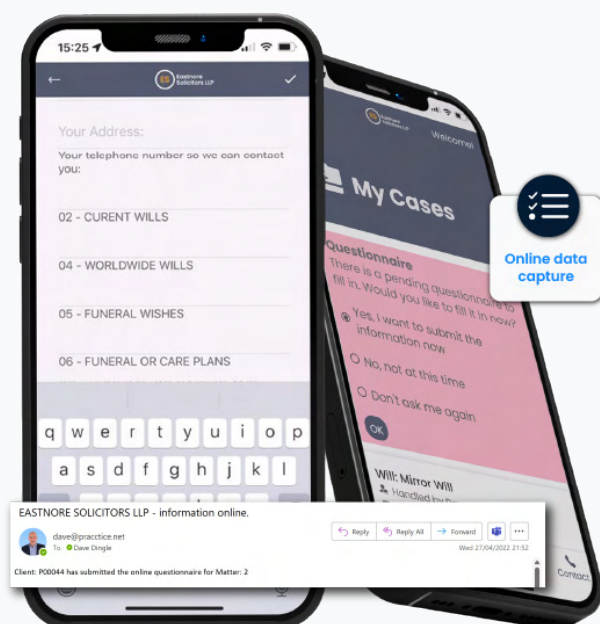
Document sharing & collaboration

The cornerstone of client portals is document sharing. They make it easy to share, view and locate documents, no matter their file type or date sent. The best client portals should also make it easy to collaborate on those documents. Clients can add comments, make amendments, and save new drafts, all whilst the document is 'checked-out' so others who have access to the same document know who is working on it.



e-Signature

When digitalising your client-facing legal processes you need an e-signature solution so agreements and contracts can be signed from anywhere, anytime. Client portals should enable that feature and integrate with platforms such as DocuSign to help increase the convenience for your clients. Watch your signed agreements be returned to you in minutes instead of days.

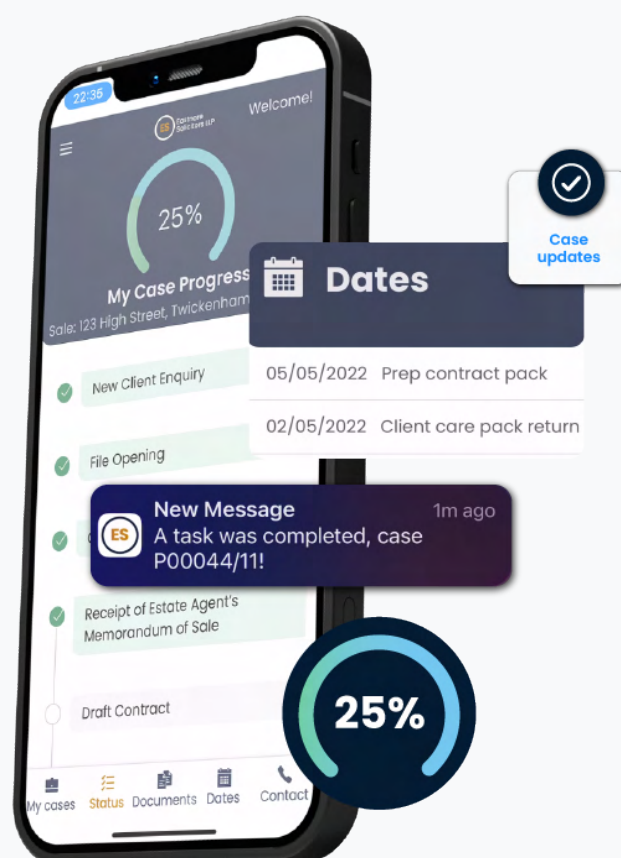


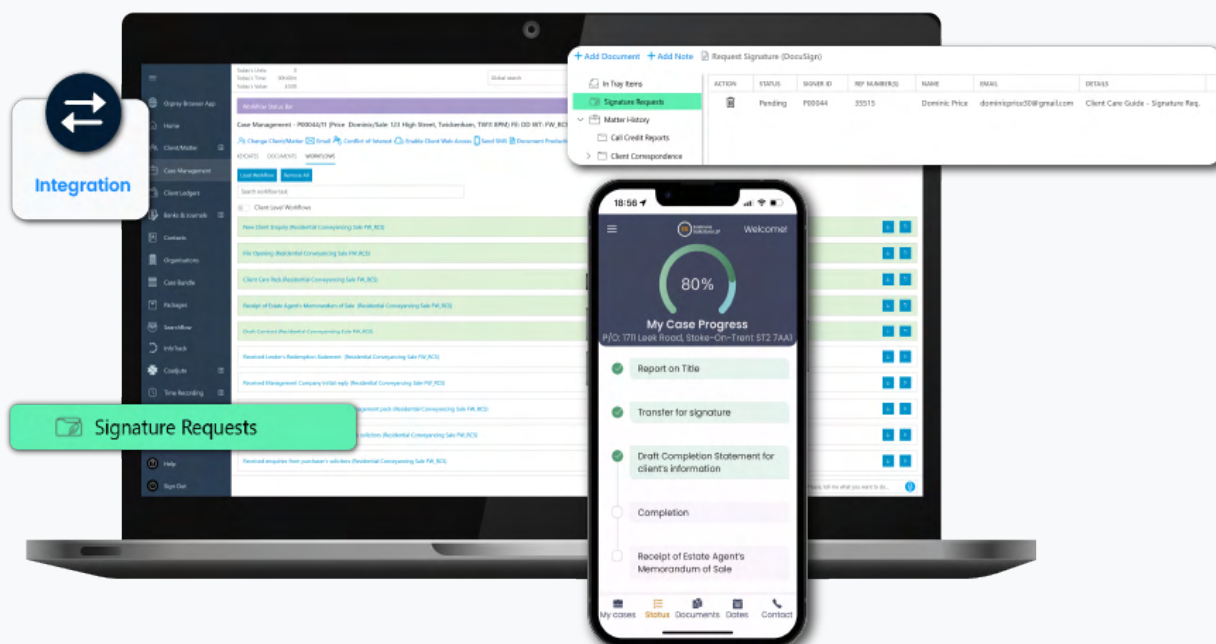
Data capture

Just like sharing documents, sending confidential data via email is also a security risk. Client portal data capture forms protect clients and ensure 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

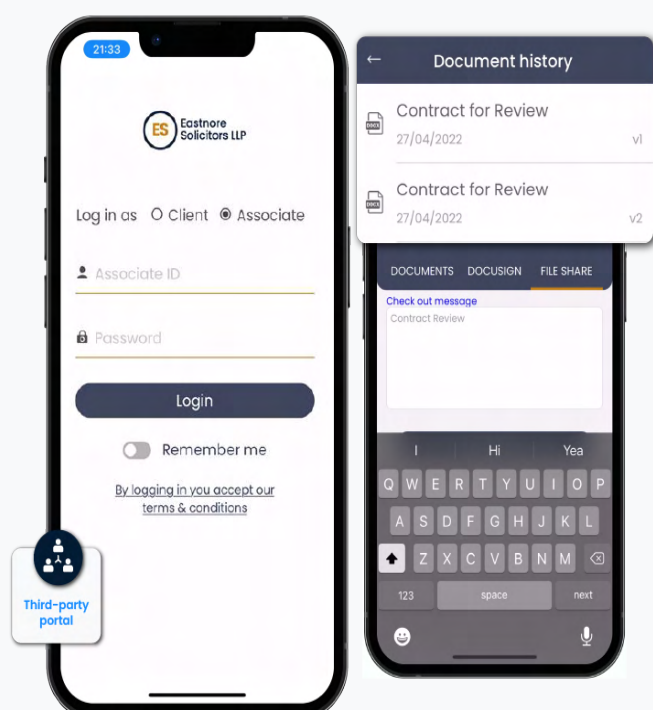
The biggest inconvenience for both clients and lawyers is phone call chases. Imagine reducing your daily calls by even 1 per client, per day. Sharing updates straight from your case management solution into the client portal saves you time and effort and means your client has up to date, accurate information. The best client portal software also lets you schedule tasks and key date reminders, so clients know when they need to supply a document, a signature, their details or evidence.





Integration

Implementing a client portal on its own will allow you to provide a client-focused service but will negate the crucial efficiency and productivity boosting features your firms requires. Ensure your client portal is fully integrated with your case management solution so data is centralised, manual admin is reduced and communication between the two can be as simple as a click of a button.



Third-party access

A complete and future-proofed web portal solution provides access and collaboration tools for both clients and third parties. When there are multiple parties involved, a centralised portal for access to data and documents can help streamline and quicken progress. It can also aid accuracy and reduce mistakes or mislaid information. Your client portal should allow you to select the files, data, communications, and updates that you wish to share and publish only those to the portal. You should always be in control of what is and isn't shared with other parties.

Digitally connect with your clients

Discover the Osprey Approach client portal software that makes it easier for you to provide competitive, five star service.

[Find out more](#)

How do I successfully implement a client portal into my firm?

Like all other technology solutions, simply having the portal won't provide you with the outcome you require. Implementing a new process or platform requires planning and thought to ensure your maximising the use of your new client portal and both your firm and your clients are reaping the benefits.

Embed onto your website

If you don't have a website yet, get one! It's the virtual shop front for your firm and the only way, moving forward, that you'll gain business and be competitive in the market. Ensure your client log-in portal is visible and clear on your website so clients can easily begin to work with you.

Offer a mobile app

To help increase client uptake and to create an enhanced and even more convenient way to communicate, offer your client portal as a secure mobile app. Fully branded to your firm and integrated with your case management solution, a mobile app provides a professional and easy way to connect with your clients.

Staff buy-in

Without complete buy-in from your firm you won't reap 100% of the benefits. By explaining the benefits and scheduling training you can help manage the change for your team. Enthusiasm and acceptance of new software solutions will help your firm move forward and your clients feel confident in your service.

Standard practice

If a client portal is seen as a backup plan or a passing trend, both your staff and clients will feel reluctant to use it. When fully implemented, make the process of sharing documents through the portal standard practice so expectations are set up front and everyone is consistent.

Provide instructions

If a client portal is seen as a backup plan or a If clients and staff members are confident using the portal, they'll utilise it's features. When setting up clients on your web portal, communicate basic instructions and answer the most often asked questions. How will they change their password? Where can they view updates? How do they upload content? Clearly communicate this information early on and your clients will have a better experience using the portal. The same applies to the firm, ensure people are confident in using the client portal and can assist their clients in doing so.

Future-proof your law firm with client portal software



A client portal 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 client portal will make capturing data, sharing updates, and sending documents safer, easier, more cost-effective, but importantly, convenient for your clients.

[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.

[Book a demo](#)

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