

Transparency Through Enhanced Unified Communications

Providing the Legal Sector with the
means to transform their communications

White Paper



Introduction

The legal sector is one of the slowest to change. While bankers' boxes lugged from office to courthouse to negotiation session only inconveniences the attorney, the failure of law firms to upgrade communications has wounded older, established practices. Law firms need to embrace modern communications and develop communications strategies that work for and meet clients where they are. That means understanding what communications should look like and establishing a modern communications strategy. Law firms that do this are more likely to see growth than those who refuse.

In this white paper we summarize:

- **Knowing the facts** - Vital statistics and misconceptions about the communication gap harming law firms.
- **Helpful steps** - Guidelines for an effective communications strategy.
- **Tools out there to help** - Options that exist to aid in effective, secure communications.
- **Going beyond** - Resources for further exploration.

Communication Gap Statistics

There's a significant disconnect between client expectations when it comes to communications and what attorneys and law firms deliver. The communications gap is not a simple one of using paper and the United States Postal Service. Instead, it encompasses far more, as seen by these stats.

Attorneys and law firm employees must understand that clients are not mindreaders. According to the [2018 Legal Trends Report](#):

- 39% of attorneys do not work outside of business hours,
- 59% of clients expect attorneys to be able to work outside of business hours,
- 68% of clients expect attorneys to meet outside of their offices.



[Clio Legal Trends Report 2018](#)

What does this mean? Attorneys must communicate to clients on what contact and correspondence will look like. Attorneys are professionals who have rights when it comes to their time and manner of doing business. Clients should be told, from the first meeting, what this resembles. Rather than meeting clients at a coffee shop and then refusing to meet anywhere outside of the office, it is essential that individual attorneys have a letter that includes how they communicate: days, times, frequency and method of communication should all be outlined.

The [report](#) also found that 55% of clients want to hear about their case face to face. Only two percent of lawyers think clients want meetings that are in person.

Lawyers' Consumer Expectations vs. Consumers' Actual Expectations

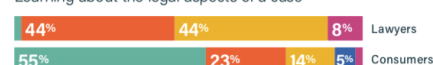
Making appointments



Telling a lawyer all the facts or details of a situation



Learning about the legal aspects of a case



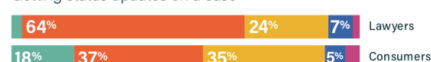
Getting quick questions answered



Communication by type:



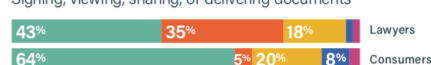
Getting status updates on a case



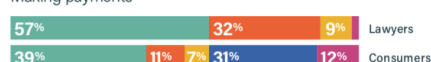
Checking hours a lawyer is spending on a case



Signing, viewing, sharing, or delivering documents



Making payments



Another disjointed statistic? Only 40.1% of clients recommend their primary law firm to peers. While there isn't research connecting the two, the fact that client communications are vastly different from how attorneys perceive communications norms could drive this.

Annually, about 33% of clients drop a law firm. This should trouble firms on two levels. First, lost clients rarely give good reviews, so potential client referrals are lost. Additionally, client retention is far more profitable than new acquisitions. A five percent retention rate yields an increase of anywhere from 25-125% of profits. Acquiring a new client, however, costs ten times more than retaining one ([Business of Law Blog](#)).

The Components of an Effective Communications Strategy for Law Firms

With attrition so high and new client acquisitions so costly, law firms must rethink reasons as to why clients leave. The numbers prove that communications are a huge part of this; thus it is time for firms to develop holistic, client-focused communication strategies. This must be done in a way that respects attorneys time—they are professionals and know how they work best, after all—, protects and diminishes the risk of privacy breaches, and assures that client time is kept sacrosanct.

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Establish Boundaries and Stick to Them

All attorneys should have their assistants draft a clear welcome letter, opting for plain speak over jargon, to outline communications from the start. While attorneys and clients have different ideas about the when, where and how of communications, being upfront about how communications work and sticking to what is in writing is usually enough to make clients happy.

These procedures should include whether or not the attorney meets or phones outside of business hours, how email is utilized, whether or not texting is acceptable, how often updates are sent, and what type of turnaround clients can expect. If a client knows they will hear back within 48 hours for non-urgent matters (urgent matters should be defined!) and this is adhered to, they will often be satisfied.

Limit Email

In addition to not being the most secure medium, email is often viewed as impersonal and can leave room for questions. **A quick phone call is often more reassuring to a client and faster for the attorney.** Clarifying questions are asked in real time and reduce misunderstandings. Attorneys should be in the practice of following up phone calls with a quick email outlining the call and what was discussed to keep a written record of the information exchanged. Always include an invitation for the client to reach out if they have questions in these follow-ups. Also, include the next time you'll be in touch. If you send weekly updates, be sure to do this even when nothing is happening to reassure your clients that their case is still being acknowledged ([Attorney At Work](#)).

Have an Internal Communications Policy

There are different types of law firms. There are those involved in less urgent matters who rarely litigate, and then there are firms who are regularly in and out of courthouses. Both juggle tremendous workloads and spend a significant amount of time returning calls, emails and other communications. Based on the most recent stats, clients are often displeased with communication frequency and style. In addition to developing a firm to client policy, internal procedures should be in place. Whether each attorney has an assistant or shares assistants, or whether or not there is a receptionist employed by the firm: **there must be clear procedures for how attorneys get messages, and how they are being traced and followed up on.** This should include training for new hires on what constitutes an emergency, which calls go through to the attorney when they are out of the office, and how records of communications are kept.



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Missed calls and miscommunication can lead to client loss and failure to gain new clients in the future.

Embrace Video

Video calls are hugely popular and can meet several needs. Not comfortable meeting clients in public due to confidentiality issues? Avoiding meeting in a client's home? Bad weather disrupting schedules? **A video call allows the parties to have the ease of a phone call with the added personal touch of a phone call.**

Similar to establishing communications boundaries in writing, be sure to include information about video calls. Require that clients wear headphones and are at home when calling (confidentiality in communications, again!). Ask that they limit movement to stop buffering. Specify the platform you use and be sure to remind clients that these are scheduled. You don't want to be caught off guard by a video call.

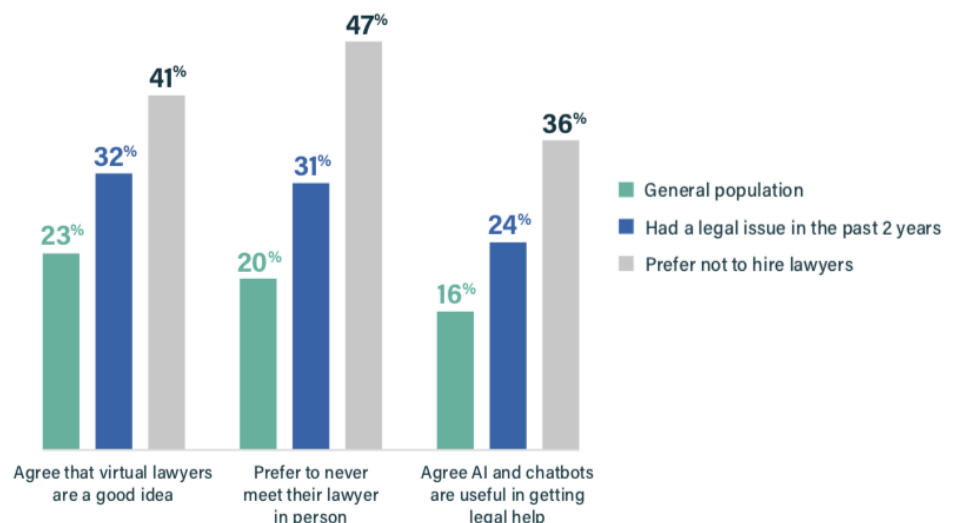
Institute a Client Portal

Client portals benefit firms, attorneys, firm staff, and clients. They serve as a secure place for much more than just documents. **Client portals keep everything in one place: invoices, calendars, documents, and communications.** Rather than emailing documents (many firms do not have secure enough email to meet the [2017 ABA Guidelines](#)), materials are placed within the portal. Parties receive an email alert when action is needed, or changes that are made. Most portals also enable electronic signatures and other modern tools to make the business of litigation and other legal services much more manageable.

When instituting a portal, it's vital that existing clients receive the same onboarding as new clients. Staff must also receive onboarding. This guarantees that the portal is accessed and managed efficiently and confidently by everyone involved.

Openness to new formats for legal service

Percentage who reported each of the following



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Accept Feedback

As law firms create and implement communications strategies, or change how communications have been done, it's vital to ask for client feedback. Are you communicating enough? Following the procedures you communicated? Is there something you didn't think of in your plan? **Monitor feedback and make adjustments as necessary.** Don't lose clients because of communications gaps that can be fixed.

Communications Tools for Law Firms

Improved communication is achievable thanks to technology. Simple updates to firms' IT systems and software can take even the most archaic law office into the future. These are some of the best tools to investigate.

ZipWhip & Textel

Clients have gotten savvier, and many simply cannot afford high hourly rates that grow exponentially when paying for letters written to the clients themselves. They'd much rather pay for attorney communications to the other parties.

ZipWip allows [texting from the firm's number](#) rather than attorney cell phone numbers (most attorneys choose to keep this number private) so that clients can be updated quickly, in a manner they appreciate, in a far more economical fashion.

Textel is another option for [firm-wide texting services](#).

Back Office Betties

While the branding of [Back Office Betties](#) is a bit tone deaf, the service is exceptional and highly lauded within the legal community. Rather than provide virtual receptionist services to all types of businesses, Back Office Betties only works with law firms. That means that all reception staff members receive specific training to deal with law firm phone calls. These calls are often high stakes: emotions running high or someone frantically searching for an attorney. A calm receptionist with a clear understanding of the legal sector is exactly what firms should seek rather than an amorphous call center with receptionist staff unsavvy to what goes on in a law practice.

LexReception

In addition to virtual receptionist and assistant services, LexReception provides excellent services specifically tailored to law firms. [LexReception](#) can provide simple message taking and reception services or go beyond the basics to provide intake and appointment scheduling for clients.



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Unified Communications as a Service (UCaaS)

UCaaS takes law firm communications to the next level. With seamless connectivity between devices and a platform that looks the same no matter what, mobile and office communications are streamlined and blend voice, data, document sharing and more. Small firms benefit from UCaaS by incorporating a system that does everything in one place and is easy to train. Medium-sized businesses can scale Unified Communications as a Service with their growth to keep spending entirely in line with growth. Finally, large firms enjoy the ease in global communications through UCaaS ([Vonage](#)).

Further Resources & Information from CRA

[Computer Resources of America](#) provides exceptional services to law firms in the areas of improved communications. Our [Community](#) platform offers on-site and hosted unified communications. Firms using this service enjoy financial control, increased productivity quality of services and flexibility. Clients appreciate the ease of contact through various media. Feel free to [contact us](#) to further discuss this or any other technology solutions we can provide.

Learn how [unified communications benefit fast-paced industries](#) that have staff continually on the move handling a mass of operations, and the [three significant benefits](#) no matter what type of business transitions to unified communications.

Other options law firms should explore include [Voice over Internet Protocol](#) and [cloud computing](#).



Corporate Headquarters

64 West 48th Street, New York, NY 10036 – 212-376-4040 – www.consultcra.com – sales@consultcra.com