



Communicating with Clients Via Today's Technology

Find out how tech tools are defining law firm conversations.

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Decades ago, law firms had fewer ways to interact with clients: in-person meetings, primarily, coupled with phone calls and written correspondence.

Major technological advances in recent years — ranging from the advent of email to high-quality videoconferencing capabilities — have introduced numerous ways to reach out and respond to clients.

Many have provided additional convenience. But given the sheer number that are available, determining the ideal client contact method can be a daunting task.

A formal communications policy is a good place for firms to start, says Robin Zaleski, a former law firm Relationships Director and current Owner of Hello Consulting, which advises law and other professional firms on communication practices.

“If the way you communicate with clients is something you feel is part of your brand, the best way to communicate that to employees is by documenting it — because that means it's not a suggestion,” Zaleski says. “If that's part of the vibe of the firm, it needs to be part of the internal structure of how it works.”

To ensure communication expectations are clearly defined, firms may want to address specific types of tech-related interaction in their communications policy. The following are some suggestions.

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THE TEXTING OPTION

Given texting’s popularity — 79% of wireless phone service subscribers solely used text messaging as of 2015, according to Nielsen research — it’s certainly feasible some clients may want to contact their attorney via text.

However, firms may try to steer clients away from that practice, says Jay Harrington, Attorney and President of Harrington Communications, which advises law firms on marketing and communications.

“If the firm allows for communication via text and it’s secure from their standpoint, I can see that working,” Harrington says. “But I would imagine most are probably directing clients to more secure channels like email because it’s administered by the firm.”

Even if firms aren’t concerned about the security aspect, texting can be problematic if a law firm has no way to tie content from text messages to its time tracking or other systems.

If no secondary solution is available to help firm members input texts into the firm’s client file storage system, firm members could, Zaleski says, take a manual approach and create a more traditional paper trail.

“If you don’t have the means to capture that in CRM software, there’s always space for notes — ‘Texted XYZ with a client; this was the gist of the conversation,’” she says. “That way, you have it for tracking purposes. There can also be reminders to make sure the hours [are logged]. It creates an extra step, but if you’re trying to capture all case information and make sure you aren’t leaving billing time on the table, staff has to get into the mindset of making a note of that.”

Firms may, of course, be able to avoid the need to manually enter information by simply not giving out attorney or staff cellphone numbers.

“It differs for every firm,” Zaleski says. “[Some] don’t want to go down that road, teaching clients [that] members of the firm are available by text 24 hours a day.”

VIA VIDEOCONFERENCING

With numerous states issuing shelter-in-place and social-distancing guidelines in early spring, many law firms — 80%, according to an April survey conducted by software provider MyCase — shifted to a remote work model. Some opted to stay in touch with one another and clients through videoconferencing.

Videoconferencing tools were, in fact, the most popular type of technology law firms adopted in response to COVID-19-related needs. Sixty-four percent of law firms implemented them in the period between March and early April.

Like phone calls, videoconferencing solutions can offer a more personal touch than email, with the added benefit of visual conversation cues and being able to offer a more dynamic introduction to new clients.

However, Zaleski says offering another conversational contact option, such as an on-site chat function, may make clients who aren’t able to speak freely more comfortable — for example, someone who’s contacting a law firm from a workplace to schedule a divorce consultation appointment.

A number of firms, such as law firms with a significant personal injury or criminal offense practice, have also added chat functions to their website due to the nature of their work, Zaleski says.

“People don’t only get arrested between 9-5,” she says. “Some firms use a third-party service for a chat [feature] that’s installed on their website. Depending on how the service is being run, the agents have the discretion to determine whether or not [the conversation should prompt] a phone call or other communication from someone at the law firm.”

The chat feature on 15-attorney firm Herrman & Herrman P.L.L.C.’s website serves as a way for potential new clients to reach out to the Texas-based personal injury firm, according to attorney Jonathan Garza.

“It’s a format we use to communicate with clients initially,” Garza says. “Former clients, too — if [our specific contact information] was lost and they remember the name and log on to the website, they can re-establish communication.”

Through the chat feature individuals speak with a live person, who sends an email containing a transcript of the conversation to a group within the firm specifically tasked with taking action.

“During the chats, [people are asked] standard questions,” says the firm’s Marketing Director, Eric Holguin. “That’s sent over via email to the intake department, made up of nearly a dozen people, which follows up with the potential new client. There is also a form on the website people can fill out, and it’s sent to the intake department, so the time to follow up [on inquiries] is really quick.”

COMMUNICATING WITH CLIENT PORTAL SYSTEMS

While a third of attorneys work at firms that use collaboration-oriented extranet sites, those communication tools are primarily reserved for internal lawyer and staff use, according to the most recent ABA TECHREPORT findings. Only 36% of clients are given access to the tools.

Some firms, such as the Los Angeles-based MKP Law Group, comprised of three attorneys, have opened the functionality up to clients with positive results.

Much of the firm’s client contact before this spring often involved phone calls and in-person appointments. However, when the pandemic prompted MKP to pivot to working remotely, Partner and Cofounder Jordan Peagler says the firm began using a client portal feature in its case management software that hadn’t been used before.

MKP found using the portal has helped keep clients informed — and also increased efficiency, according to Peagler.

“[It] gives our clients the ability to see claim updates and the status of their files easily via the internet,” he says. “Clients can find answers to lots of their questions, especially since they can read the notes we have left directly on their cases. This saves our attorneys time to tackle some of the bigger parts of the cases. When we speak to clients directly, we can spend more time speaking about the case rather than the process.”

With so many messages flying back and forth about cases, firm news and other topics, law firms may also benefit from using internal communication software for matter-specific or all messages, Zaleski says.

“It’s a good way for teams to keep track of conversations and keep their email inboxes uncluttered with internal communication,” she says. “That way, the inbox isn’t daunting. With [some tools], you can set a reminder to reach out again if a person didn’t respond, and it gets it back on your radar.”

EFFECTIVE EMAIL COMMUNICATIONS

Email has been a widely used client contact method for years. Yet firm members still can — and do — insufficiently communicate information through it.

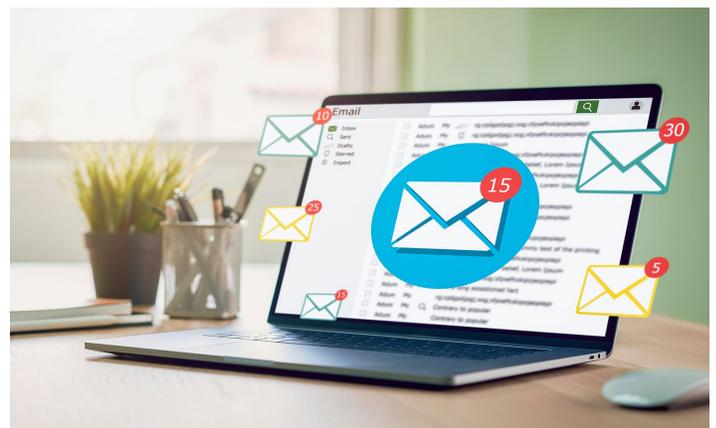
Some issues can be avoided by using the firm’s secure email system instead of personal email — for example, paying attention to who messages are being sent to and avoiding copying nonclients in emails that would otherwise be subject to attorney-client privilege. But Harrington says message regularity can present some challenges.

Clients who may be anxious because they’re unfamiliar with the legal process and don’t know what to expect could prefer more frequent touchpoints, Harrington says. That may be especially true in the current legal climate, with cases moving slowly due to courts closing over COVID-19 concerns.

Conversely, attorneys can also overwhelm clients with too much communication — sending lengthy, bloated email messages too often.

“It’s a big pain point for clients,” Harrington says. “They don’t feel like they have time to sift through tons of information. They just want to know the implications.”

Louisiana-based Spera Law Group switched to a system last October that uses data from email records, calendars, phone logs and other sources, along with automation. This helps facilitate communication, according to the firm’s Founder Andrew Legrand.



Spera feels reaching out to clients every couple of weeks is best. Reminders triggered by email and call log activity let an attorney know it's time to reach out to a client because it's been two weeks since they last sent an update.

The response, Legrand says, has been encouraging.

"We haven't gotten any complaints that we don't communicate enough or that we overcommunicate," Legrand says. "One of the metrics we've tried to track is how many times clients have asked for an update on what we're working on. We've brought that down in the past four months pretty close to zero because the system is prompting us to look at things more often. That number definitely has trended down."

Some firms, according to Harrington, survey clients at the beginning of engagements to determine the ideal contact frequency. "More firms are seeking client feedback," he says. "Some clients like being communicated to every day via email; others like once a week with a status report. It [gives firms] a better understanding of client preferences."

MAKING MESSAGES SUCCEED

Client contact frequency, however, is just part of the equation. For a firm's communication efforts to be truly effective, the messages firm members send need to be informative, concise and clear — whether the content is delivered via email, text or in person.

That isn't always the easiest proposition for professionals who are used to crafting legal briefs and persuasive arguments, according to Legrand.

"For lawyers, that can be a challenging — really getting out of the muck of 'Well, maybe this and that' and 'I recommend this,'" he says. "Clients want the practical answer, not the law school answer, and those are often not the same."

After researching copywriting techniques, originally with more of a marketing intent in mind, Legrand realized he might be able to apply the principles to client communications. He says the knowledge has been tremendously beneficial.

"Learning the basics has helped me understand how to better communicate with people, especially clients," Legrand says. "Constantly revising emails, getting to the point quickly, making emails interesting and valuable — it really is that part of client communications that isn't taught in law school. Legal research and writing [are] great when you're making an argument. That's not how clients want to receive things."

ABOUT THE AUTHOR

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