

JULY/AUGUST 2018

SUPPLEMENT INSIDE:  
DATA WORKS

# LPM

LEGAL PRACTICE MANAGEMENT

THE ONLY  
MAGAZINE  
FOR LAW FIRM  
MANAGERS

LPM ASKS

*Vidisha Joshi, managing partner at Hodge Jones & Allen, about being boss*

EXPERT  
COLUMNISTS  
AND ADVICE  
FROM PRACTICE  
MANAGEMENT

BRAIN TRAINING

*What's a holistic lawyer and should your firm consider joined-up legal services?*



## Who are you?

*Every business has a culture, whether you like it or not  
- what are SME law firms doing to build up theirs?*

BUSINESS INFORMATION FOR EVERYONE IN PRACTICE MANAGEMENT

# CLIENT COMMUNICATION

GRAHAM MOORE, THE DATA GURU



Email is the new snail mail. This was the suggestion made to me recently by the managing partner of a law firm during a fascinating conversation about how law firms communicate with their clients.

Ten years ago, when I first returned to the legal sector after a brief sojourn in financial services, one of the key efficiency issues I was struck by was the prevalence of paper-based correspondence. In the intervening years this has been much reduced by an increased use of email, but is that now becoming the new problem?

We are all now used to renewing our insurance by filling in a form online. Most of us wouldn't dream of emailing our bank, and visiting branches is becoming a thing of the past (yes, I know there are demographic differences). Even the government is in on the act with online tax returns and the MoJ providing paperless online divorce applications.

So, how does your firm communicate with clients? Are you one of those 'modern' firms that emails forms to clients that they then have to print off, fill in by hand, scan, and then return? And how do you provide progress updates on cases? Do you wait for the client to ring or email you? And do you then secretly resent the interruption to your daily work?

Is there a better way?

Some firms have 'client portals' in place now. This is not a new idea; I recall building one for a debt recovery specialist back in the 1990s. Often, these will provide consolidated updates on all matters for a given volume client or referrer.

All the data on progress should be in your case management system, so why not share that with clients?

Deal room technology also exists and provides a way for lawyers and clients to collaborate on document drafting and review. While these systems may be expensive, in most areas of business it is common practice for any document sharing to be done using cheap and

simple services such as Dropbox. Regulation may create extra hurdles for achieving this in legal services but it is by no means impossible.

However, in mainstream SME law both of these are, in my experience, rare. There is surely a huge opportunity for forward-thinking firms to distinguish themselves by providing online access directly 'into' the case file. Why should your client not be able to interact with you via secure messaging on the portal? Why should they not be able to access, review and approve drafts in situ without the exchange of emails? What about video calls with their lawyer to discuss the case?

I wouldn't claim to be the first person to suggest this but the technology is now there to provide a complete end-to-end legal services client experience online. It is not necessarily for every case type or every demographic group, but as millennials become more and more significant as consumers of legal services they will inevitably expect, or even demand, the same experience they receive in other walks of life. [LPM](#)

“ *There is surely a huge opportunity for forward-thinking firms to distinguish themselves by providing online access directly 'into' the case file.* ”

## ABOUT

Katchr  
Profit from your data  
Contact on:  
0845 680 6843  
[www.katchr.com](http://www.katchr.com)  
@KatchrData

