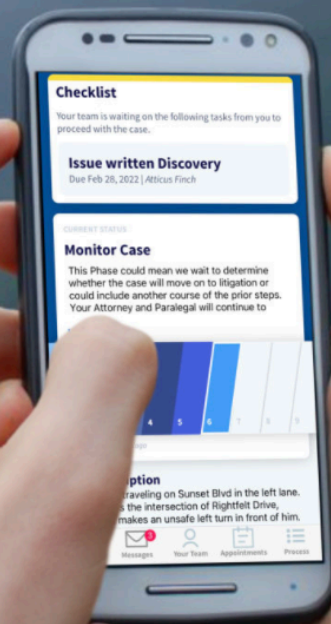


STATUS UPDATE

Mobile Portals and Messaging are the Best Ways to Communicate with Modern Law Firm Clients



CLIENT PORTALS

LAW IS A CLIENT SERVICE BUSINESS

Lawyers are well educated and intelligent. But, despite that, many attorneys make the same mistake over and over again. They listen to that old adage, to make clients happy, and to get more business, all you need to do is 'good work'.

Only, that adage no longer matches the legal industry of today. There are more lawyers, and more competition, than ever. The simple fact of the matter is that **most lawyers learn to do 'good work'; and, it really doesn't differentiate them from their peers nearly as much as they think it does.**

The truth is that clients choose, stay with, and recommend law firms for the same reason they choose other businesses: based on the customer service provided. And while lawyers may want to just practice law, what clients care about is customer service (more data on this later).

When it comes down to it, law firms that provide better customer service are the ones that have the happiest clients, and are usually the ones that make the most money.

Given that most law firms perform in the 'middling' to 'poor' classification when it comes to customer service, the competitive advantage for law firms that perform well in that category becomes magnified.

For your firm to step into the breach of effective customer service, you'll need the right tools. And while fax machines were cutting edge technology three decades ago, the world, and most importantly clients, have moved on to these things called smartphones.

The first step in providing better customer service begins with communicating with clients more regularly and effectively. Unfortunately, many lawyers only communicate with their clients on a limited basis, often when they need something. But, law firms that notify clients regularly and effectively about the status of their matters, as well as checking in on a regular and consistent basis, receive significantly improved customer service rankings, and best their competitors in this most important sphere of influence.

So, the question is: How do law firms create a ruthlessly effective communications process, while also tending to substantive work, and administrative matters? How can law firms make this process easy on themselves, and their clients? These questions bring us back to the selection-of-tools part of this equation. Historically, law firms have fared poorly in this regard.

But the Internet, software, and smartphones have combined into the ultimate solution for modern law firms: mobile client portals.



ADOPTION: LAW FIRM CLIENTS PREFER BUSINESS MESSAGING + MOBILE CLIENT PORTALS

Texting's kind of a thing. Even pre-pandemic, in 2018, there were 2 trillion texts exchanged. Just for context, that's 5.5 billion texts every day. And, that number was up 15.8% from 2017. Since then, messaging has exploded.

But does it have a significant effect on action, or are folks just ignoring messages like junk mail (electronic or otherwise)? It turns out that 98% (!) of SMS messages are read, compared to just 20% of emails¹. Plus, it takes the average person just 90 seconds to respond to a text versus 90 minutes to respond to an email². Beyond those statistics, we all have the experience of texting as a method for getting a quick response from someone. If your mom wants to get in touch with you, what does she do? She texts you.

Now, you may be thinking, that's all well and good; but, these are personal channels: What's the business use case? Well, 83% of mobile device users prefer to receive messages from businesses versus phone calls or emails³. Of course, almost everyone in the world is a 'mobile user'; and, this is a pretty strong indicator that your clients want to receive messages from you - and that is a problem for your law firm if you don't offer it. The argument from lawyers against messaging for business becomes less grounded post-pandemic. It's sort of like the attorney who

says that their clients only want to pay them via check or cash - when those are the only payment options offered, and everyone just wants to hand over a credit card.

The increasing number of messages circulating the globe has been rising alongside the usage of smartphones. In fact, the number of active smartphones in the United States grew 31% for period 2014-2017⁴. (Again, pre-pandemic numbers.) So, if your law firm is using an old school web-based portal for client interaction, like traditional law practice management software systems offer, consider whether that's a viable product in a world in which everyone is glued to their smartphones all day long.

In an always connected world, the better play is to launch and utilize a mobile client portal, accessible via Smartphone app. The numbers would seem to indicate that this option would work famously; so, does it?

Yes: [Case Status](#) user numbers indicate that 83% of law firm clients adopt the mobile portal, with some firms reporting that after implementation, their call volume has been reduced by as much as 80%.

THEY SAY 'LOOSE LIPS SINK SHIPS'; IN LAW FIRMS, CLOSED LIPS MEAN CLIENT CHURN

The #1 mistake that law firms make is not staying in touch with their clients. Perhaps not surprisingly, the #1 ethics complaint against law firms is lack of communication. There's also the negative outcome of losing a client (plus revenue), or losing a referral that a happy client may have made, or getting a bad review online. If your law firm is not consistently in touch with your law firm clients - there's no good that can come of that.

This is a problem for law firms of all types, not just consumer facing practices. This issue also exists for law firms working with business clients, including as outside counsel. In many ways, the pain is more acutely felt in these circumstances because the revenue stakes are so much higher. Business owners rank ongoing communications as the #1 factor in choosing outside counsel⁵. Business owners want to be informed about their cases, and they also want attorneys to exhibit an active, ongoing interest about the cases they work on, by asking questions and seeking information.

The #3 ranking factor for choosing outside counsel was responsiveness to and anticipation of client needs⁶. Not meeting those expectations from business owners has a serious impact for law firms: 51.7% of business clients indicate that they've switched law firms based on lack of communication⁷. **So, if you're a law firm owner, understand that not staying in touch with your clients means you might not keep your clients.**

You know what lawyers think is the most important ranking factor for clients in choosing a law firm? Yup, you guessed it: lawyer expertise - when, that's actually near the bottom of the list for most people⁸. Again, this is buying into the fallacy that doing 'good work' is the only requirement for attaining and retaining clients. This misbelief has sunk more attorney-client relationships than anything else. Law firms do not have a guaranteed right to clients. They must continually provide excellent customer service. And the most surefire way to do that is to stay in consistent and regular communication with clients.



WHY CLIENTS LEAVE

51.7%

Percent of business clients indicate that they've switched law firms based on lack of communication.

CLIENT PORTALS: SECURE, ETHICALLY COMPLIANT, & SUPPORT AFFIRMATIVE DUTIES

Mobile client portals and messaging are the most effective means to communicate with clients. But client portals are also more secure than traditional information sharing methods that law firms relied on. Many law firms share information via email, including attachments, and don't secure the data they send, which is an inherently insecure method of communicating sensitive data when emails may pass through dozens of servers before reaching the final destination.

It's more efficient and safer to use an encrypted portal, where clients and others have access to the information you share only within your system. In client portals, the data remains secure (encrypted), and is not in transit anywhere it may potentially be exposed. **A mobile client portal provides this level of security, while also being easier for your clients to access (on their smartphones and tablets) than old, web-based portals.**

Of course, business messaging can be even more like the Wild West than business emailing. Most law firms will engage business texting the same way they engage texting their mom or their friends. In fact, 88% of business people text their customers via their own phones or the SMS service on their business-issued devices⁹. Not only is that a serious security loophole, it also exposes law firms in a significant manner: malpractice.

Messaging on a non-firm controlled device doesn't conform with ABA Model Rules 5.1 & 5.3 (Duty of Supervision over lawyers & non-lawyers). When your assistant messages your client on her personal phone, you can't exercise your duty of effective supervision. Messaging via a specific, encrypted platform creates a permanent record, an audit trail, and allows control over those communications on any device.

Not to mention that law firms must support, at least in some capacity, a remote workforce (and remote clients). Utilizing secure tools for client communications such as client portals makes it easy and clear-cut for staff to comply with remote work and data security policies, because the firm controls the entire platform.

In addition to reducing potential ethics claims by facilitating more regular communication with clients, **mobile client portals and business texting applications may help lawyers meet their professional competency requirements.** At this point, most states have updated their ethics rules to include technology competence as part of a lawyer's professional duty; using tools like client portals makes you are compliant and ahead of the technology curve, while also sewing up data security issues that are prevalent in most law firms.

HAPPIER CLIENTS. FEWER OVERWHELMED ATTORNEYS.

For the first 6 months of 2021, Case Status customers avoided almost 100,000 hours of unnecessary phone calls by delivering consistent notifications to clients via the system's mobile client portal. In that same time frame, there were nearly 70,000 client interactions happening in the mobile client portal.

CLIENT PORTALS MAKE LAW FIRMS MORE MONEY

The coronavirus pandemic has now become the most massive business interruption in modern history. No business has been left unaffected. Law firms were also hit hard, particularly in the early stages of the pandemic, when many business relationships more or less shut down for a period of 30-60 days.

But, law firms that utilized client portals were better able to navigate the effects of the pandemic, in both its early, and later stages. Law firms using client portals mitigated the revenue impact

of the pandemic by 5% in April 2020¹⁰. Moving forward, those law firms performed 2% better than their competitors who were not using client portals; and, as soon as June 2020, they were seeing positive revenue growth again¹¹. In fact, law firms using client portals collected \$16,556 more per lawyer in 2019 than their competitors; in 2020 (the year the COVID-19 pandemic hit), those law firm did even better, by collecting \$23,587 more per lawyer¹².

Business interruptions, driven by global or local issues, are

a fact of modern business management. Client portals help law firms to navigate these storms, while also providing more security, happier clients, and more dynamic staff.

The efficiency upgrade client portals provide law firms benefits nearly every aspect of a law firm. Given the on-demand, realtime nature of the world that we all live in, the question is not *when* will your law firm get a client portal.

The question is, will your law firm get one in time?



case status

Case Status is the Leading Mobile Client Portal & Messaging Platform for Law Firms



Efficient law firms utilize software to efficiently drive intake, case management, and client communication. Case Status is the only client management platform designed for clients to communicate efficiently with your firm.

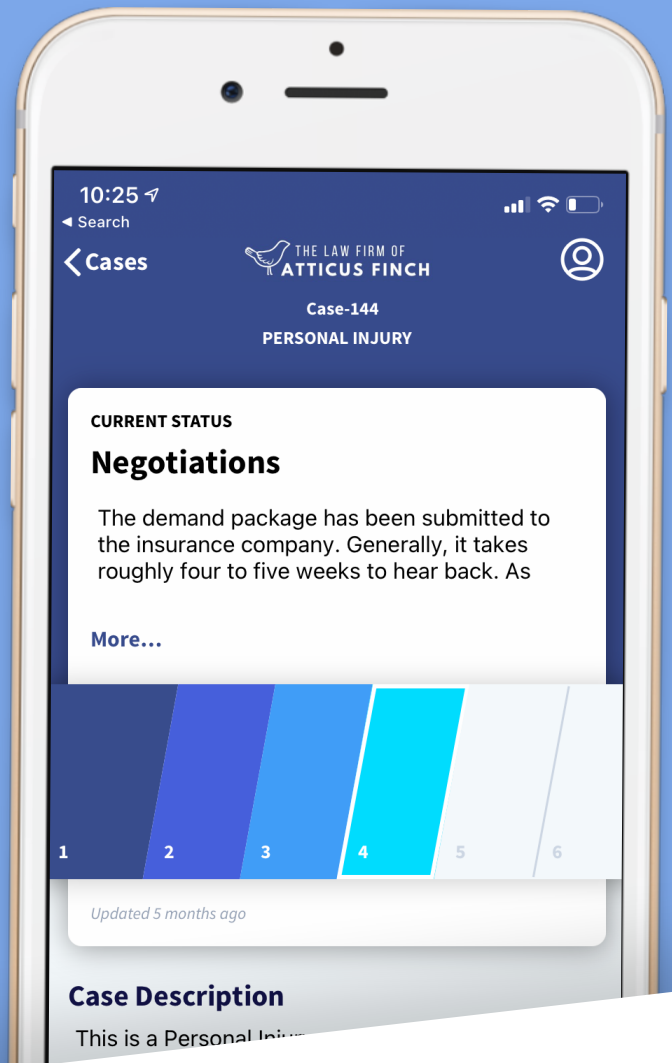
Operational efficiency in a law firm starts with effective communication and ends with happy clients. Unlock your client communication capabilities with Case Status.

Give your firm the ability to update all of your clients with a single click. Centralize your firm communication across multiple attorneys, case managers, and clients. Case Status reduces your time managing clients, so you can focus on being a lawyer.

[CASESTATUS.COM](https://www.casestatus.com)

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CASE STATUS

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