

# Agility is key: How to meet client service expectations in 2021 & beyond

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The COVID-19 pandemic forced businesses across industries to adapt, and the legal profession was by no means exempt from the virus' impact. Lawyers have shifted to remote work arrangements, in-person client appointments have given way to virtual meetings and law firms rely one way or another on technology to keep their practice afloat.

Law firms that have been successful during the pandemic are those that quickly adapted to remote working. These agile firms adopted technology that gives them the ability to work from anywhere and drive productivity despite the circumstances. They can keep matters moving and meet increasing client expectations, which recent studies show soared during the pandemic, particularly in terms of client demands around support and communication. **\*[1]** A 2021 survey of nearly 300 law firms by BTI Consulting Group found that the service expectations of law firm clients are now higher than ever, a byproduct of the pandemic. **\*[2]**

It appears these heightened client service expectations are not retreating anytime soon. Additionally, after over a year of contactless customer service options clients have become comfortable with and even prefer digital service options, especially self-service features that they can access any time of the day or night. It is simply easier for them, both more convenient and efficient. Lawyers can be sure that clients will expect access to online self-service options for legal services as well.

Law firms, particularly small to mid-sized law firms, need to consider this shift in client preferences if they want to remain competitive. They cannot simply revert to pre-pandemic client service models. To provide the best possible client service in 2021 and beyond, lawyers instead need to be agile and adapt to clients' heightened service demands.

## **There are 4 actions lawyers can take to stay agile and meet clients' increased support expectations:**

- 1. Provide 24/7 online self-service access to your law firm**
- 2. Speedily respond to clients**
- 3. Be fluent in video conferencing**
- 4. Tap into the power of collaboration**

These key actions focus on how legal productivity solutions and technology can help you meet client demands, increase your firm's operational efficiency and stay competitive in today's client-driven market. Each initiative will help you to become agile, so that you can be responsive to clients' needs and provide excellent customer service.

## **1. Provide 24/7 online self-service access to your law firm**

Throughout the pandemic, enterprising law firms have found ways to interact with their clients remotely to keep matters moving. After over a year of virtual interactions, many clients have now come to prefer conducting their business online.

**\*[3]** In fact, according to Microsoft's recent comprehensive report on the global state of customer service, a colossal 86% of consumers indicated that they expect organisations to offer online self-service options. **\*[4]**

Agile law practices will continue to succeed by offering self-service options, such as online client portals, which allow clients to interact with their firm at a time convenient for them to do so. A client portal helps law firms easily meet the needs of both new and existing clients. For example, rather than requiring new clients to come into an office for intake, you can increase client satisfaction (as well as your firm's efficiency) through an online portal.

Successful firms utilise innovative technology to meet client needs. One example of such technology is comprehensive practice management software that has a convenient and user-friendly client portal option, built right into the software. When assessing potential technology solutions, note that online portals should provide clients with a variety of self-service options, including the ability to complete intake forms, book appointments, share documents and view and pay invoices.

You should not only look for a solution that has a built-in online client portal—make sure the software provider includes online services (such as a user portal) for you and your law firm as well. Your provider should ensure you have access to multiple convenient tech support options, such as online chat consultants and email support, so you can resolve any software issues quickly and keep your practice running smoothly.

## **2. Speedily respond to clients**

Clients need more assurance and clarity as a result of the pandemic. They have become accustomed to receiving rapid responses to their enquiries. Emailing law firms to request updates has become even more ubiquitous as the lines between office hours and off hours blurred during lockdowns.

In this client-driven market, law firms cannot afford delays in responding to clients. Lawyers who are disorganised and lack a system for immediately pulling the necessary files to promptly reply not only risk losing those clients, but also the potential for positive referrals from satisfied clients. Staying competitive in our 'new normal' means that you must be willing to meet clients' increased communication expectations. If you don't, you can be sure there is another firm that will.

Lawyers must be able to easily locate client files and access these files from anywhere. The most efficient firms overcome this issue by utilising cloud-based practice management software, which securely stores client data in the cloud. Cloud-based storage allows you to readily access client information, emails and documents in one organised and searchable electronic matter. Instead of wasting time digging through paper files, you can quickly search a client's name and pull any information you need from their matter.

Once you've easily located client files, you need to be able to reply without delay and from anywhere. This is where cloud-based matter management provides additional benefits. Your data is updated in real time and securely accessible from any cloud-connected device, such as your iPad or mobile phone. You can reply to a client from your iPad while working remotely or from your phone while in court waiting to be called for an appearance.

Comprehensive practice management software should also give you the power to quickly generate and manage professional emails. Through integrations with email providers such as Microsoft Outlook, you can merge your firm and client details to generate standardised firm correspondence from any device. In addition to offering features that enable you to expeditiously reply to clients, look for a software solution that provides efficient email management. With a cloud-based system, every email you send and receive is automatically saved to the relevant electronic matter, so you have an organised system without expending any additional time or effort.

Successful firms understand that strong client relationships and satisfaction are the result of prompt and accurate client communications. These firms also utilise technology to help streamline and manage all of their client correspondence. A multifaceted, cloud-based practice management solution will enable you to respond to clients quickly from anywhere at any time. Gaining control over the complexity of client correspondence will allow your firm to flourish in today's competitive market.

### **3. Be fluent in video conferencing**

In the blink of an eye, virtual meetings have become the norm. Many clients now prefer the convenience of meeting online, and firms need to adapt to this preference. In fact, lawyers too stand to benefit from the efficiency and flexibility of online client meetings.

It is vital for lawyers to be skilled in the use of video conferencing technology. This includes ensuring you have a strong, reliable internet connection to avoid embarrassing glitches and delays that may make clients think twice about your firm's competency. Savvy meeting hosts also test their technology before meetings, including their speakers, microphone and webcam, to ensure everything is in good working order. You may also consider setting up a projection screen or large monitor so that clients have a clearer visual.

A wide range of video conferencing platforms exist. An efficient option is legal practice management software that includes seamless video conferencing technology, such as Zoom, Microsoft Teams and FaceTime. Such integrated practice management solutions allow you to conveniently schedule a Zoom meeting directly from a client matter or your calendar. Integration with Teams allows you to schedule video calls and sync scheduled meetings to your Outlook calendar. An integration with FaceTime will allow you to conduct video calls from a client's electronic matter right from your iOS device.

Agile lawyers are also ready to conduct video meetings from any location with their mobile devices. It is important to look for a legal practice management solution with integrations that give you the ability to hold virtual meetings from anywhere. When selecting a software provider, take note of whether they offer a Mobile App, which will give you the ability to send FaceTime invitations to clients.

### **4. Tap into the power of collaboration**

Clients of small to mid-sized law firms were generally price-sensitive before the arrival of COVID-19, and the pandemic only served to tighten the finances of many. Now more than ever, clients appreciate the ability to collaborate. Collaboration gives clients a sense of control and transparency—values which have become more important to clients during the pandemic—and a way for firms to streamline costs.

One excellent way to meet this need is through legal document management and collaboration features built into your law practice management software. A well-designed solution will allow you and your clients to securely share documents from any mobile device so that they can review, sign and comment on documents and respond with ease. A comprehensive practice management solution will also make it easy for lawyers to share invoices, remind clients of outstanding balances and provide online payment options.

Law firms have also felt the strain of COVID-19 and have the same financial concerns as their clients. Small to mid-sized firms must be cost-efficient and make sure they are getting the best software and resources for their money. A robust, cloud-based practice management solution results in more accurate time capture, efficient operations and cost savings on servers and maintenance costs, so that you not only save money but also generate more revenue.

Just as your firm needs to stay agile to meet the rise in client expectations, your software provider should also seek to remain agile—to constantly improve their technology to provide the most value and return on investment. Part of this process includes soliciting the feedback of lawyers to ensure the software always addresses the needs of small to mid-sized law firms. Your provider should also routinely provide updates on new features and product enhancements, so you can stay on top of industry trends. You and your firm are committed to providing the best service possible to clients, so your software provider should be dedicated to supporting your firm's continued success.

## Summary

The above four actions are practical steps you can take to adapt to the increased service expectations of clients resulting from the pandemic. A strong practice management software will help you meet these expectations, by providing a wealth of convenient online resources for your clients and by also offering your firm access to the support it needs to stay agile and successful in 2021 and beyond.

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**[1]** The New CX Mandate: Insights & predictions of 1500 customer service leaders - 2020 Survey Report (UK Edition), Freshworks, Inc., The New CX Mandate (UK Edition)

**[2]** BTI Client Service A-Team 2021: Survey of Law Firm Client Service Performance - Executive Summary, 2021, BTI Consulting, Inc., <https://bticonsulting.com/wp-content/uploads/2021/03/BTI-Client-Service-A-Team-2021-Executive-Summary.pdf>

**[3]** See footnote 1, supra, The New CX Mandate.

**[4]** Global State of Customer Service: The transformation of customer service from 2015 to Present Day, p. 37, Microsoft Dynamics 365, 2020, [https://clouddamcdnprodep.azureedge.net/gdc/gdcPiLLQw/original?ocid=mkto\\_eml\\_EM582302A1LA1](https://clouddamcdnprodep.azureedge.net/gdc/gdcPiLLQw/original?ocid=mkto_eml_EM582302A1LA1)