

**SPECIAL
REPORT**

Personalising the legal client experience

Digitalisation and personalisation

Law firms' work is built on personal, face-to-face engagement with clients and the values this close connection implies—trust, confidentiality, and bespoke service. As a result, it's counter-intuitive to suggest that online collaboration and communication between lawyers and their clients can create a smarter, more personalised experience—but it can. At the same time, digitalising these critical processes can provide law firms with greater efficiency, seamless collaboration between colleagues, and differentiation in the marketplace.

Obstacles to a better future

The traditional nature of law firm business—localised and in-person—creates clients who, appropriately, expect a high level of hands-on customer service. This is especially true for consumer legal services that require delicacy and sensitivity.

to provide cost-effective services and improve profitability—which requires increased efficiency, sharing knowledge across the organisation, and completing transactions more quickly. Secondly, with more people are working remotely—a trend accelerated by COVID-19—face-to-face meetings are problematic.

New technologies can solve this challenge in ways that benefit firms as well as their clients. These solutions support remote operations, increase efficiency, improve client engagement and communications, and address data security concerns.

There are, of course, obstacles to adoption and implementation including resistance to change and fear of the unknown. Clients may be uneasy accessing remote services because of the misconception that they're complicated, and technologies such as chatbots can be intimidating to clients and lawyers alike. Meanwhile, smaller firms may lack adequate knowledge of these digital tools and the IT expertise to successfully implement them.

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TOP 10 FIRMS identified technology as the key challenge to growth in the next 2-3 years

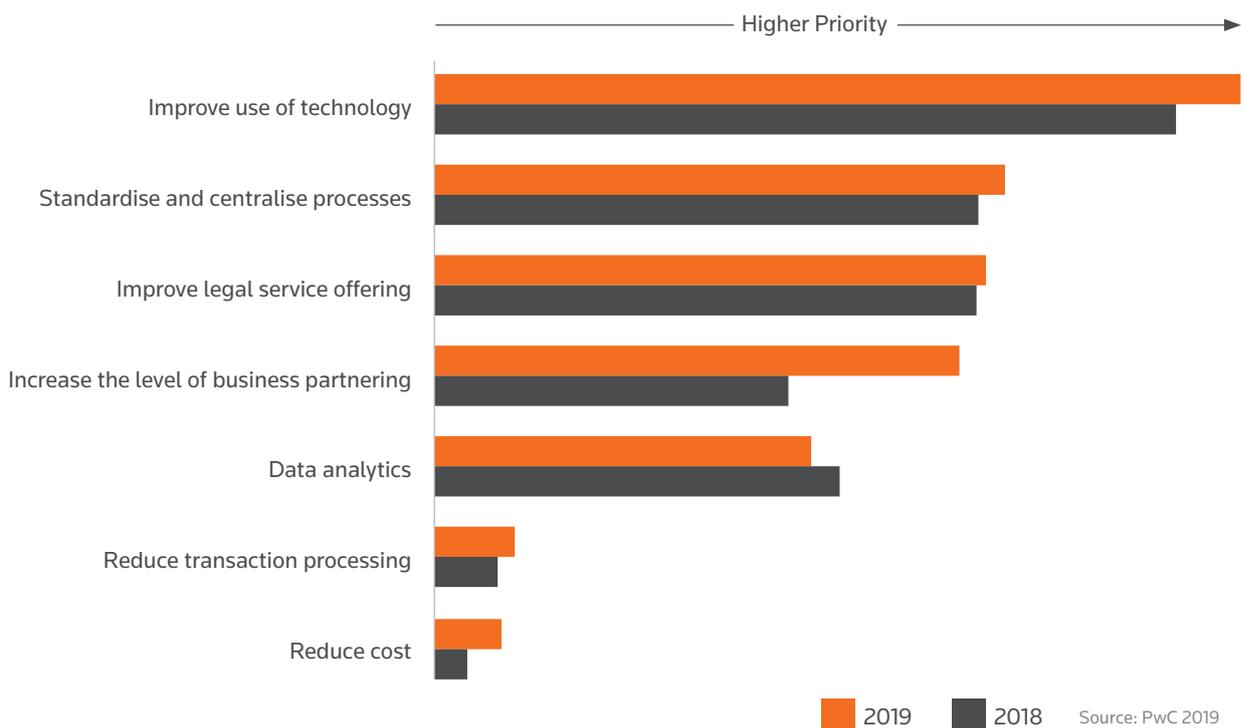
Source: PwC 2019

New realities, however, make this traditional model potentially unsustainable. First, law firms are under growing pressure

New pressures in service delivery

Client service is in flux as many legal clients turn to lower-cost providers for legal process outsourcing. Law firms also are impacted as corporate clients bring more work in-house and turn to alternative providers for specialised services such as e-discovery, research, document review, and litigation and investigation support. Some law firms are taking a 'blended' approach that combines their traditional legal services with specialised services delivered through subsidiaries and innovation labs.

Top priorities for business support over the next 12 months (Top 100 firms)



As change continues unabated, there is an opportunity for firms to use specialised, intuitive technology to enhance client service, collaboration, and communication.

Heightened concern about data breaches

Lawyers have always identified risk and confidentiality as top concerns. In the digital age, that leads directly to cybersecurity and a relentless focus on protecting their clients' personal data. As a result, firms need assurance that the digital platforms they adopt provide exemplary cybersecurity for their clients' personal data and business information.

Concern over quality

Lawyers need to be assured that automation and demands for increased productivity will not undermine—and can, in fact, bolster—the quality of their legal work. Better process and program management tools support personal clients, give them access to justice through less expensive, more efficient legal service, and enhance the law and the community-at-large. In fact, lessons learned delivering high-quality, competitively priced legal services to consumers can inform the way law firms serve discriminating, cost-conscious corporate and government clients.

Technology and people

People are at the heart of the law. After all, it is people who manage processes and operations, do and want things, take risks and make mistakes. Therefore, it's fitting that their interactions with their lawyers have traditionally taken place in-person—a dynamic that creates a specific type of highly valued client experience.

That face-to-face engagement model, however, is increasingly less practical or desirous for the reasons cited above. Thankfully, new technologies, when deployed adeptly, can produce more fulfilling and attentive lawyer-client relationships.

Getting the balance right between technology and people in the delivery of legal services is critical to law firms' future success. Most people love much of what technology offers including smartphones, remote working opportunities, convenient shopping, and increased health and safety. However, certain technologies such as chatbots and other remote services may be unfamiliar and, therefore, intimidating. People (including lawyers and their clients) often prefer doing things the way they always have done, even when it is less optimal than new options. For law firms, there also may be doubt about how much they can transform the client experience. Collection of client data and legal research, and how it is funded, are particular pain points for firms.

Technology has, of course, changed the way people work and COVID-19 has revealed both how interconnected we are and the gaps in the way we work and collaborate. As remote working went from an option for some to a necessity for many, we learned lessons about how we can work flexibly and remotely more efficiently. We are learning new and better ways to collaborate and work with scattered teams. Recent challenges have indeed been a catalyst for reimagining the workplace and society, and we can expect more changes ahead.

Law firms, like many other businesses, have traditionally dictated the communication channels available to clients. However, the profession must evolve to meet new demands from clients and tap the new capabilities of technology. Flexibility, clarity, and visibility are increasingly important to clients, and the right legal technology, such as client portals and microsites, can assist in delivering the ideal client experience. Such technologies provide a personalised workspace where lawyers can easily and securely share documents, collaborate, effectively interact with clients, and deliver better service and more value.

How firms are embracing efficiency initiatives



Placing new technology adoption at their centers



Better communication with staff and clients



Working more efficiently



Holding lawyers and staff accountable for productivity

Re-imagining relationships

Being client-centric entails using—and enhancing—the channels that clients and prospects want to use to engage with the firm. Some may want face-to-face meetings, while others prefer a digital experience. Many want a blend of the two: digital ease combined with the reassurance of physical engagement. Whatever the route, firms need to ensure their offerings are flexible and responsive to client needs. Achieving this level of service requires education for both law firms and their clients. Best practices will vary for business and consumer clients, but ultimately offer the same outcome—integrated technology that is easy to implement and extends throughout the firm.

73% of customers expect companies to understand their needs and expectations



71% of customers expect companies to interact with them in real time



67% of customers say the way a company uses technology indicates how it operates in general.



Source: Salesforce 2019

Managing workflow

Being successfully client-centric will future-proof law firms. On a daily basis keeping track of cases, billing, and due dates save time for both lawyers and clients and allows everyone to focus on the client matter. Whether implementing an invoicing service, optimising billing processes or facilitating electronic filing, the practice should foster integration. This can improve workflow efficiency and, thus, profitability.

Effective communication

To communicate effectively is both a technological and human effort. Digital channels that reliably and quickly analyse and deliver information on a contractual dispute are as important client touchpoints as a word of comfort before a court hearing. Each of these scenarios entails assessing and conveying what is important to the client—and demonstrating understanding and empathy.

Technology platforms provide standardised processes that enable consistent client communication, ensuring messages aren't missed or forgotten amid the busy day-to-day workload.

Establishing processes and procedures for a range of recurring legal tasks and issues extends this approach to ensure clients know when and how they will receive updates and when they need to respond. This type of 'legal dashboard' also delivers a personalised workspace that provides simple, secure access to all related content.

Data-driven thinking

Reimagining the legal process means being data-driven. From the client interview, to legal research, to developing a legal strategy, there is a need to collect and store a large amount of data which will continue to expand. This requires the right tools, which frees the lawyer to analyse data and process and share information quickly so decisions are based on a solid foundation of research, information, and analytics rather than intuition or bias.

Re-imagining legal processes

There are ways to re-imagine the legal process with this focus on technology and communication. For instance, firms could offer business clients the flexibility and freedom to digitally search their problem and to have this information automatically passed on for a fee earner to begin work under a form of subscription service. Personal clients, who often are legally literate, could be offered more digital and self-service access to the law from, for example, online dispute resolution tools and conveyancing and legal bot-advisors. Lawyers must be ready to respond to these developments where the commoditisation of legal services intersect with the need for expert and specialised advice.

Changing paradigms

The changing focus on legal services delivery and growing use of more efficient, effective tools is creating a new paradigm of the lawyer-client relationship that is destined to impact revenue, profitability, quality, value, and customer experience.

The ability to respond to client requests with a new ease and to deliver updates at the touch of a button as a legal matter progresses certainly benefits clients.

They can enjoy a relationship that is flexible, collaborative, and gives them more ownership over their legal matters. For law firms, this model creates competitive advantage by improving the speed and quality of service—a valuable differentiator.

Striking a balance between technology and people empowers lawyers and their clients to experience the full potential of their relationship.

About HighQ

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