



HighQ

Client portals

# Law firm success checklist

The questions to ask to make client collaboration your competitive differentiator

- Does your firm offer the experience clients expect?
- Are there easier ways for you and your clients to collaborate?
- Do your clients feel empowered?
- Are you making your clients feel special?
- How efficient are your processes?
- Are your clients confident you've got a handle on everything?
- Are you seen as innovative?
- Where is the best place to start making improvements?
- What does success mean to you?
- When can you start?

How loyal are your clients? Evidence suggests that the ties that bind law firm and client are loosening, and that clients are becoming ever more willing to shop around for a better deal — including broadening their horizons to include smaller firms. The quality of legal expertise is no longer enough. You must differentiate your firm in other ways.

Today, the client experience is critical. Firms that are better at communicating and collaborating with clients have a sharper competitive edge and curate closer client relationships. Not only will they keep their existing clients happier, they have a better chance of winning valuable new business. Many firms are deploying client portals to make this happen. Client portals are a showcase for law firms, where they can demonstrate their commitment to each client by putting them at the heart of all their matters and giving them a seamless digital experience. They act as a personalised hub for each client, connecting them more closely to their external legal advisers.

Solutions such as HighQ from Thomson Reuters are now widely being used as client collaboration tools, and firms are using the platforms in many innovative ways to ensure they stand out from the crowd.

Before investing in a client portal solution, there are some fundamental questions firms should ask about where they are now and where they want to get to:

## Delivering a superior client experience

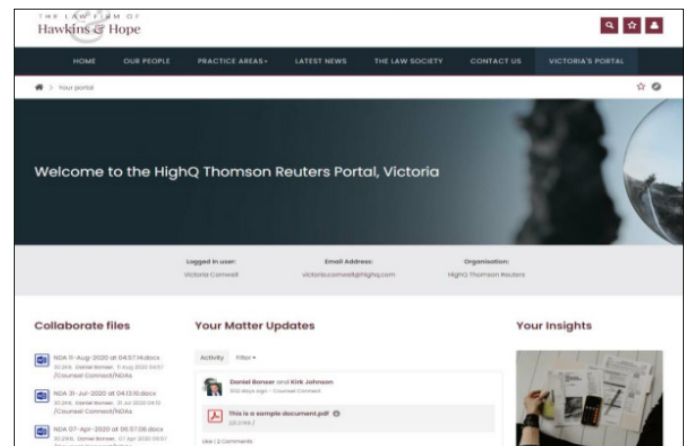
### 1. Does your firm offer the experience clients expect?

Customer service is paramount, and you want to ensure that your clients are getting as good an experience — or better — than your competitors are offering.

Good communication is essential here. Most complaints about law firms are due to a perceived or real lack of responsiveness or poor communication. Clients often feel frustrated when they have to chase their lawyers, which can undermine the good work you are doing and harm the client relationship.

But how do you make sure you are responsive 24/7? Even more challenging, how can you be more proactive about your communications, keeping clients updated on the status of their matters without adding to lawyers' to-do lists?

The answer: a client portal. A portal creates a seamless, always-open communications channel between lawyers and clients. It eliminates the need to continuously send out messages on next steps or progress, because the portal itself provides clear insights around tasks, events, updates, and financial information, and keeps a record of interactions. So clients can see exactly what's going on, whenever they like.



Equally, it can give you instant notifications of client activity on the site, so that you can respond as necessary. And if clients do have a question, according to our research\*, most law firms feel they can respond to their clients' inquiries faster using HighQ client portals than they could before.



**85% feel they can respond to their client's inquiries and status requests faster than they could before using HighQ client portals.\***

\* Thomson Reuters survey among HighQ users conducted in 2023/4

## 2. Are there easier ways for you and your clients to collaborate?

Do you find it frustrating when documents are flying back and forth? How do you know which is the latest version and who has it? When someone is off sick, how easy is it to pick up where they left off? Is fielding calls from clients and other third parties taking up too much of your time?

Legal work takes hundreds of different touch points to get the job done. Without a central way to coordinate all these interactions, there can be confusion, things can take longer than necessary, and tasks can get missed. If you find yourself thinking: “There must be an easier way” — you’re not alone.

Portals can make sharing and feeding into documents friction-free because everything is housed in one secure place, and acts as a single version of truth. When a lawyer uploads or updates a document, the client will be invited to view it in the portal and take any necessary actions, such as signing it. When they’ve done so, the lawyer will be notified. So, all the relevant people can see and comment on the latest versions, and are kept informed of what’s happening, with no need for a constant trickle of emails to be sent out or to trawl through multiple folders in various locations to find the right file.

Tellingly, almost all the law firms we surveyed\* (98%) say they see improved efficiency when exchanging and locating documents through HighQ portals.

**98%** see better efficiency when exchanging and locating documents with HighQ client portals.\*

## 3. Do your clients feel empowered?

Many clients operate in fast-paced, demanding environments, so they need to feel in control of their legal matters at all times as they answer to — and increasingly seek to add value to — their business. They want real-time visibility into matter status and task progress, and transparency around their billing and financials.

If you don’t provide this, another firm will. According to the latest [Thomson Reuters Digital Strategy report](#), more than 80% of law firm respondents are taking a proactive approach to digitising work, with the primary motivations being to improve efficiency, client service, and competitiveness. Having information at their fingertips in the form of graphs, charts, and trackers makes clients

feel empowered and builds trust and confidence in their external legal advisers.

Clients may even want to be able to generate some of the more standardised work, like creating agreements, themselves. A portal can make these types of legal activities even more efficient by enabling clients to self-serve standard documents, such as contracts, directly using Document Automation in HighQ.

Firms that use HighQ are already offering these kinds of valued-added services. Some are going even further, building their own solutions in HighQ and monetising their innovations via on demand or as paid/subscription-based digital services and tools to generate even more revenue and add even more value.

**“HighQ acts as a hub for our clients so they have one place to go for status updates, document generation, and more.”**

- Innovation/KM Professional

## 4. Are you making your clients feel special?

Law firms are often concerned with understanding how they can build their client relationships in a virtual environment. Won’t the rise of digitisation eliminate that all-important human contact and make interactions feel purely transactional?

Client portals don’t eliminate the need for personal client contact — they just eliminate the need for all those mundane, and sometimes irritating, touch points such as sending documents or chasing things up by email. In fact, portals can actually help clients feel more connected to their lawyers, because they have their own dedicated space where they can collaborate with them.

Everyone likes to feel special now and then — and with a client portal, you can make clients feel like they are the centre of the universe all the time. You can tailor it just for them, such as by putting their branding alongside your own to make it look and feel like it’s theirs. You can make sure it offers them the information they want to see, in the way they want it displayed, and that the right tools are at their disposal, such as e-signature capabilities. You can even post content in key areas they are interested in, such as guidance notes, insights, news, or thought leadership pieces on relevant industry or legislative changes to create a bespoke intelligence hub.

\* Thomson Reuters survey among HighQ users conducted in 2023/4



To get this right, you need to know your clients well beyond simply having a good grasp of their legal needs. You need to know what — for them — makes a great client experience, so that you can deliver it. Do you gather feedback on what clients think of the service they are currently getting? Do you ask them what else they would like you to do to make it even better? If the answer is no, should you start asking those questions on a regular basis?

“From when we started using HighQ, which was over 5 years ago until now, it has made huge impact on our clients.”

– Lawyer

## Providing value for money and building trust

### 5. How efficient are your processes?

Making your processes more efficient is win-win for law firms and their clients. Your lawyers can be more productive and focus more of their time on interesting, important work. Clients get their matters dealt with faster and more cost-effectively.

Harnessing technology is often the key to doing more work in less time. Unlike most portal solutions, HighQ offers a way to accelerate processes by automating workflows, so legal projects can be managed more effectively and efficiently, to deliver an even more superior service to clients.

Think about: what are our most repetitive processes? Can they be standardised and replicated using automation to drive greater productivity, speed up timescales, and deliver more for less?

Not every document requires a bespoke, artisan approach, so why not save your time for those that do and automate repeatable tasks where possible? Similarly, is it possible to reconfigure workflows, cutting out unnecessary steps and ensuring nothing gets forgotten by using tech tools to help direct what needs to be done, by whom and when?

By rationalising workflows and automating tasks in HighQ, you can drive up efficiency gains, and improve client and job satisfaction. In fact, almost nine in ten of the HighQ users we spoke to\* said they have found it frees them up to focus on more valuable work.

**26%** of firms have already implemented technology specifically to drive efficiency and profit.<sup>1</sup>

**63%** of firms are actively highlighting the use of this technology to their clients and potential clients to demonstrate how they are operating efficiently and cost effectively.<sup>2</sup>

**88%** of respondents agree that using HighQ allows them free up time to focus on more valuable work.\*

“HighQ saves both our and our client’s time and improves transparency at work.”

– Associate

### 6. Are your clients confident you’ve got a handle on everything?

Keeping on top of complex legal matters and meeting demanding client requirements can be a monumental organisational task requiring excellent administrative and

\* Thomson Reuters survey among HighQ users conducted in 2023/4

1 Source: Meaningful collaborations within law firms: Podcast – Thomson Reuters Institute 2022

2 Source: Accelerating the Redesign of Support Services to Meet Escalation Client Demand for Cost Effective Legal Services – 2023 Report, [BigHand](#)

legal skills. Clients need to be confident that you're across absolutely everything. Are you? Here are some ways to analyse your operations to establish how comprehensive your systems are or whether there are gaps that need plugging:

- Do you use project management tools to keep things on track? If so, how effective are they? If not, how can you be sure everyone is doing everything that needs to be done, at the right moment, in the right way? And how do the rest of the team and clients know when something has been actioned or progressed?
- Can you lay your hands on documents immediately or do you have to search through multiple files and folders in different places? Can you provide a status update at any given moment?
- How common is it for errors to creep in or for things to get missed?
- Can you tie actions to results? Are you able to demonstrate the value you are providing?

Client portals can help you stay ahead of the game because they provide tools specifically designed to manage complex projects such as transaction, litigation, or portfolio management. They put everything in one place, so that if you don't know the answer to a question or need to lay your hands on a document, you can quickly find it. And they bring teams together, so no-one is working in silos.



**90% of users report an increased level of confidence that they have not missed any key information or risks as a result of using HighQ.\***

Security is another major concern for clients. While having everything in one place in a portal is attractive to clients, they need to know that operating in this kind of collaborative space won't put their confidential information and data privacy at risk. Choosing a solution with robust, market-leading security built in is vital: ideally one with granular access permission settings so that people can be given the right levels of access to particular matters or documents. That way, access can be restricted on a very detailed level, so individual visitors to the site — on the client side, law firm side, or third parties who may need to be involved in certain areas — can't see anything they shouldn't.

**“The reason why we use HighQ over anything else is the security. This is key for our clients. Other tools are not as secure to transfer documents from, so HighQ meets that expectation. Clients very rarely have difficulty uploading documents to it.”**

- Large law firm user

### **7. Are you seen as innovative?**

Clients expect law firms to be on the front foot — not just on legal matters but in customer service and use of technology too. They are constantly having to adapt to change and innovate and, increasingly, they are looking to partner with firms that are similarly dynamic and continuously striving to improve.

That goes for prospective clients as well as existing ones. More and more clients are asking about innovation in RFPs. Research by the Thomson Reuters Institute shows that perception of innovation alone can be a powerful influence in buyer decision-making. Investing in the overall client experience by implementing and innovating with modern technology creates a critical competitive advantage in a pitch. Those that don't risk losing out.

Collaborating and communicating through client portals is a perfect way to deliver innovation to clients and position the firm to capture more of their budget. Since portals are not static environments, they give law firms a platform on which to highlight that they are moving with the times — and even setting the pace.

Ironically, however, portals can also inject some much-needed predictability into how matters are managed via greater standardisation and automation of work processes, central coordination of documents and data, and visibility over upcoming actions or events — something that is also likely to be appreciated by clients and lawyers alike.

If showing that you are a forward-thinking firm that deploys technology to clients' advantage is a critical differentiator in winning and retaining business, be prepared to answer questions on what makes your firm stand out on this front.

\* Thomson Reuters survey among HighQ users conducted in 2023/4



The **Top 3** HighQ benefits cited by customers are 1) Improved client experience/retention, 2) Time savings, and 3) Improved consistency / quality of work output.\*

“Where appropriate, HighQ is part of any pitch or proposal we put together: showing potential clients its capabilities and the HighQ environment can help us win business.”

- Law firm user

## Delivering ROI to your firm

### 8. Where is the best place to start making improvements?

There's a lot you can do with a client portal, but it's best not to try to do everything at once. To keep the change manageable, decide on your priorities, such as which particular pain points you want to address or key business benefits you want to unlock first. Consider: where will we get the biggest bang for our buck initially? How can we make a good impression with clients fast? Where are the greatest collaboration opportunities? Is there an area where we can test the water with automation before rolling it out more widely, such as using it to smooth out and speed up the client intake process, thereby getting projects off to the best possible start?

Having a plan will help get internal buy-in, which is vital for engagement and success. It will also inform what you need to look for in a solution and what questions to ask vendors so you know you are making the right choice.

That said, it is worth considering what bells and whistles you might want to deploy further down the line to make sure the product you choose is future-proof. Think about:

- What features and functionality are most attractive to you now, and which offer potential for the future?

- Is the solution customisable to your needs? What capabilities do you need to do that? Is it low-code/no code?
- Does the vendor invest in keeping the product ahead of the curve so it remains fit for purpose going forward?

Even relatively basic client portals can be impressive to clients, but solutions like HighQ make it easy to be as creative as you like.

“We have been able to centralise information, making it easier for clients and our team to keep track of information.”

- Associate

### 9. What does success mean to you?

Having decided on your priorities, it's vital to determine the outcomes you want to see and define what success will look like. This will be different for each firm, and perhaps for different departments within them. For example, as you enhance collaboration, are you looking for:

- Cost savings?
- Increased profitability?
- Efficiency gains?
- Greater client retention?
- More new business wins?

Many of these overlap or go hand in hand, but it's important to be clear about exactly what you want to achieve from the outset so that you can set goals and targets, and measure performance. Remember that return on investment (ROI) is not always about financial metrics.

Client portals should comprise in-built tools to help you track performance, making it easier to see, for instance, how long processes take, whether you are shortening turnaround times and where cost savings are being made.



Users cite **cost savings** as the top financial benefit seen resulting from using and collaborating with clients via client portals.\*

\* Thomson Reuters survey among HighQ users conducted in 2023/4

“As everything is held in one place we have a much better overview of metrics such as matters raised; this has helped us understand where we need to focus our time and also what areas may need improvement.”

- Innovation/KM Professional

#### 10. When can you start?

Sophisticated yet easy to use client portal solutions are already out there. Other firms are already using them and making them their own. Soon clients will come to expect this from their legal advisers and those that don't have these capabilities could fall behind.

Now is the time to start planning what your firm and clients need and how best to implement client portals to facilitate collaboration for maximum benefit.

**94%**

say HighQ has improved collaboration and communication with their clients.\*

Client portals provide an excellent way to deliver a digitised yet personalised, efficient yet comprehensive client experience in which collaboration is simple. Connecting more closely with clients can help your firm exceed their expectations, demonstrate value, and build trust, strengthening your relationships. Meanwhile optimising the way your firm operates is essential at a time when law firm profitability is being pinched by higher costs, lower productivity, and declining realisation rates.

A superior client experience involves many elements: responsiveness, proactivity, efficiency, value, predictability, innovation, and transparency, to name a few. Technology-driven solutions such as client portals are a powerful way to deliver all this in a straightforward manner.

“The ability to access the platform from anywhere at any time has been a big win for us and our clients.”

- Associate

\* Thomson Reuters survey among HighQ users conducted in 2023/4

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## Client collaboration

Find out more about how collaborating through client portals in HighQ could make a difference for your clients and your firm.

[Request demo](#)