Virtual Collaboration for Remote Law Firms, Part 2: Working with Clients

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In Part 1 of this series on virtual collaboration, we discussed collaborating with your team. In Part 2, we'll cover what it takes to collaborate with your clients.

In a law firm, it can be difficult to know how to communicate with clients remotely, especially if they are not tech savvy. There are lots of ways to do it, but getting clients to use a new piece of technology just to communicate with you is a bit of a roadblock. We want to give you a few ideas on how to make this issue a little easier.

One perhaps obvious note: collaborating with clients is very different from collaborating with your virtual team. You'll have less control and no compulsion. With a virtual team, you can choose one piece of technology and get everyone to use it. But your clients won't be as easy to convert to the same system. Some will want to use google docs, others may still insist on faxing something to you, and there will always be that one client that calls you instead of using a simple interface to find what they need.

The question with clients is how you'll collaborate in ways that adapt to their lives. Here are some useful ideas to get you started.

Use what is most familiar

First off, there is a large obstacle to adopting technology that needs to be overcome. Even clients who are tech savvy can sometimes have a hang-up about using something new if it's not intuitive. One way to make that easier is to choose a technology that everyone is already familiar with.

Google Meetings or Zoom is probably the most familiar technology to your clients. (Thanks, pandemic.) If you sense that your client isn't particularly tech savvy, focus your effort on getting them to use something familiar rather than trying to convert them into a platform they don't know.

From a video conference, you can screen share to review documents line-by-line with them. (And if you use Google Docs to go back and forth on edits, make sure you turn on Suggestions so you can review their changes before the document is edited.)

By starting with familiar technology, you can keep clients engaged. Consider adding a survey of which tools are familiar to them in your intake process. Starting with tech-familiar clients can create impactful time savings for your team even if you still have a few clients that require more personal (non-digital) assistance.

Know your own technology well

Before you engage with clients via new technology, make sure your own skills and processes are up to the task.

It's not enough to know the very basics of the tools you use in your firm—you need to know how to use as many of the features in your own software as possible. When technology is integrated into your practice, understanding those tools is part of the job.

Do you know how to screen share without figuring it out on the fly? Do you know how to allow your client to screen share? These might seem obvious, but if you're fumbling with the technology during a call, your clients may start to wonder why you require them to adopt it when you haven't.

Client portals: Pros and cons

One technology meant to address collaborating with clients is the secure client portal for law firms. Many tools exist in this category, but you should evaluate them with a critical eye.

Client portals sound like a good collaboration solution—everything is in one place, your team can easily work within the system to get your client what they need, communications are secure—but be cognizant of any learning curve you're imposing on the client. Are you asking them to learn a completely new system that's only relevant to this one legal matter? Do they need to create an account to access it?

Getting clients to use a portal is almost trickier than getting your team to adopt a new technology. Some clients might reasonably wonder why they can't just email or call you instead. It's one more password they have to remember, and one more screen they have to stare at wondering where the information is that they want to find.

One way to make this easier for them is to use the client portal yourself, as if you are a client, before you implement the system. You can find out if it's user-friendly. From a branding perspective, are you ok with how it looks? Are you ok having the portal creator's logo in the corner and not your firm's? Or do you want your firm's brand only? Pay attention

to both user experience and branding, and work with your portal provider to get it just the way you want. If that learning curve is too much for you, know that a client will have zero patience with it.

Create training materials

If you find that the technology you've chosen yields tons of questions from your clients on how to use it, you'll need to support them. Consider creating training videos.

Assuming they are clear and quick, training videos can relieve pressure from your support staff and empower clients who'd rather not engage in a troubleshooting session. Videos on how to log in, what kind of documents they can expect to see, what forms you will need filled out, and even direct screen shares of the entire process can help out a lot.

Relatedly, consider hiring a technical writer. Teaching technology adoption is a learned skill. Someone who's done that work in other contexts can write a one-time how-to manual for your process. Always make learning your firm's tools easier than you think it should be. Few clients will understand their incentives to change.

Automate your intake

Once your training materials are created, sprinkle them throughout your automated intake process.

An email drip campaign for new clients is a game-changing technology. Set it up to automatically deliver a training video to new clients every week, or whichever time seems appropriate. And once you've created a basic automated intake process, you can use the same technology to tailor which training videos get sent to them, specific to their case.

Encoding these steps into automated tools is a lot of work up front. But once you have this intake process set up, it saves an incredible amount of time. One law firm we spoke to took their intake process down to only 3 clicks, and everything else is automated. This takes a lot of the pain of intake away, both for you and the client.

Explain the benefits of collaboration to your clients

Whether you use a client portal or something like Google Docs to collaborate, explain the benefits of these tools to new clients.

For example, a law firm client portal might allow them to check the status of their case anytime they want without waiting to connect with you. That makes the technology's benefits clear.

If you are billing clients hourly, let them know that you can do your work faster if they adapt to using your system, thus saving them money. Explain to them that they will never have to drive to your office to drop off a check, and can pay from the convenience of their own home (assuming you've already got a convenient billing and payment solutions in place).

Emphasize the ways that using technology enables you to do better work for clients and they'll be a little more motivated to work with you.

When it's worth it

Ultimately, you must decide how much hand-holding you are willing to do with your clients. Will you end up spending more time as IT support than as a lawyer? That's a real risk.

If you have long-term litigation cases where the relationship is ongoing, you will likely want to train them to use your software. It's a wise investment. But, if your clients primarily work with you for one-off transactions, it might be easier for you to adapt to what they find most familiar.

Your collaboration strategy should follow from your client-centered firm design. If you can adapt to your client's need and expectations, you'll give them an experience that they appreciate and share.

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