A Guide to Better Law Firm Client Communication

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Good client communication can make or break a lawyer's reputation. Whether you're meeting a new client, emailing an update, or sending out a bill, you shape your client's idea of what it's like to work with you every time you communicate with them. A positive experience can mean the difference between a new business referral and a poor review.

And that matters, especially as reviews are more important than ever to a firm's success. Clio's *2020 Legal Trends Report* found that client reviews are the single most influential factor when considering the hireability of a lawyer. Moreover, inadequate communication can create a negative perception of a firm, often leading to unfavorable Google Reviews, as highlighted in the latest *Legal Trends Report*.

However, many law firms don't communicate with clients in the way that clients expect. If you're looking to build better relationships with clients (and earn strong reviews), there's plenty of opportunity to improve client communication.

In this guide, you'll find tips and tools to help elevate client communication and build a more profitable law firm.

How do lawyers communicate with their clients?

Lawyers have an abundance of choice when it comes to client communication. This includes traditional methods like in-person or via phone call, along with newer alternatives such as secure mobile apps. The form of communication used depends on various factors, such as client preferences and the technology available.

Regardless of the method, it's important to useplain language, listen actively, and try to pre-emptively answer questions when communicating with clients.

Client communication best practices

For an experienced skier, a bunny hill is no sweat. But for someone new on their skis, that gentle slope can feel steep and challenging, and may elicit fear.

The same goes for legal cases. While lawyers deal with legal challenges every day, their clients don't. A little empathy goes a long way in helping legal clients navigate unfamiliar situations—and in keeping things running smoothly for everyone.

Here are a few best practices for top-notch client communication.

Communicate clearly, and often

It can be easy for things to get lost in translation, so making a deliberate effort to ensure your client understands what's going on can prevent unnecessary back-and-forth or misunderstandings.

A few ways to do just that:

- Avoid legal jargon in client communication
- Use plain language where you can
- Leave an opening for your clients to ask questions.

For the last point, a simple "please don't hesitate to reach out if you have any questions" at the end of a lengthy email can make a big difference.

Strong client communication goes beyond just providing regular updates on a case. It's also about being proactive so that clients feel truly informed and cared for.

For example, get in the habit of answering your clients' questions pre-emptively. After client calls or meetings, send an email that summarizes what was discussed and provides supplemental information for any next steps.

Set expectations from the start

Setting clear expectations with your clients can help frame their experience and avoid disappointment. One way to do this is by specifying parameters in your engagement letters. This includes:

- How often to expect communications
- What they will entail
- Which channels you'll use

It's also worth outlining *when* you'll be available. The *2022 Legal Trends Report* found that 68% of clients expect their lawyers to communicate outside of traditional business hours, during evenings, and on weekends. Yet, lawyers who worked regular business hours were

28% more likely to have a positive professional life compared to those who worked irregular hours.

You'll serve your clients best when you're at your best, so setting availability expectations upfront is key to ensuring you can care for yourself while meeting your clients' needs.

Invest in developing your interpersonal skills

Contrary to popular belief, clients aren't coming to you solely for your encyclopedic knowledge of the law. A little empathy can improve the client experience, particularly in high-stress matters such as divorce, bankruptcy, or criminal defense.

A highly developed emotional intelligence (or EQ) can help you better read both your own and your clients' emotional responses and adapt your behavior appropriately.

How can lawyers improve their emotional intelligence? Legal business coach Irene Leonard suggests four ways:

- **Learn to recognize your feelings by taking a step back from them.** Observe an emotion and the reaction it produces within you. Practice identifying your emotions and their real causes. Anger, for example, may spring from frustration or self-doubt.
- **Work on managing your feelings to avoid destructive communication**. It's important to know which feelings are appropriate to express in a particular situation, and which are better kept private and dealt with later. Learn to manage your emotions, not suppress them.
- **Realize that communication involves a lot more than what is said.** Empathy can be developed through listening carefully and observing people's body language and facial expressions.
- **Deepen your connections with other people.** Learn to empathize, to talk about your feelings, to listen patiently, and to calm yourself down before discussing a problem.

Your law firm's service is just as important as the legal results you provide. Your clients have legal needs, but they have emotional needs as well. That's true for all practice areas. From family law to business law, your clients want to feel reassured that their legal needs are taken care of—and this comes down to good lawyer communication.

In other words, your ability to ensure your client feels heard, cared for, and enabled to make informed decisions has significant value, so it's worth keeping your interpersonal skills sharp.

As a starting point, these are a few communication skills for lawyers to master:

- Take extra care to watch for visual cues when communicating in person.
- Stay present and engaged when you're with clients.
- Ask probing questions when you sense there's more to the story.

Listen, listen, listen

You might think that client communication is about giving legal advice—but often, what clients need is for you to first listen.

As Irene Leonard of Coaching for Change explains, it's easy for lawyers to jump in and share their thoughts before they've truly understood the problem. This can leave clients feeling as if they're not truly heard.

> ""Since lawyers are smart, we often anticipate what is going to be said, and don't feel the need to listen carefully. But when we really listen to a client, we can hear levels of communication that may deepen our understanding of the client's problem," she says. "Be open to the possibility that you do not have a complete grasp on the problem before it's been stated, that you do not know what the person is going to tell you.""

To improve your listening skills, Irene suggests that you avoid interrupting or rehearsing answers while their client is talking. Instead, make sure to pay attention to non-verbal cues, like emotions, to best communicate with clients.

Active listening is also important. In an article on active listening from the Harvard Business Review entitled "What Great Listeners Actually Do," the authors found that the best listeners do these four things:

1. **They ask questions**. If you ask questions, your client will know that you've heard them, you understand them, and you're asking for more information.
2. **They're supportive**. Each time you interact with your clients, make it a positive experience for them.
3. **They're cooperative**. Don't be afraid to give feedback to your clients, but be sensitive with your delivery—your client should feel supported, not criticized. Also, don't be afraid to accept feedback from your clients.

4. **They make suggestions**. Good listening isn't always associated with jumping in and solving a problem—but when delivered well, suggestions can be a sign of a good listener. In short: when it comes to client communication, delivery is king.

Do your best to follow these four points, and you'll be well on your way to reaping the benefits of active listening for your firm.

Know when to automate communications (and when not to)

In the digital age, automating tedious or repetitive processes can be a big win for law firms. However, when it comes to client communication, it's important to be thoughtful and ensure that automated messages are convenient for you and your client.

As a general rule of thumb:

- Simple and transactional client communications are fine to automate (Such as Clio Grow's automated online client intake forms)
- More personal and specific communications are best left to humans

For example, it's a good idea to send out an automated new client welcome letter like Palace Law does to set expectations and keep your client informed on how to access case information.

However, if an anxious client calls or emails the office looking for reassurance or an update on their case, an automated response might not be well-received. A receptionist can provide an empathetic, timely response that helps calm your client's nerves—even if it's only to say you're unavailable and will respond shortly.

Finally, no one likes to hear bad news from a robot. That's why it's always best to share any difficult updates in person.

Know which channels to use

Depending on which area of law you practice and the types of cases you handle, different communication channels may be more or less appropriate for different situations. You have a range of mediums available to deliver news, answer questions, and provide updates, including:

- Phone
- Email
- Letter

- Text
- Video conference

When a client phones with a question, it may be more appropriate to email the answer so that the client has it in writing for easy reference. Or, you can reassure the client over the phone and follow up with a brief note via email for posterity.

Also, consider what types of communication channels your client prefers—and for what circumstance. Most favor phone calls for status updates, as our *2021 Legal Trends Report* revealed. Some clients, however,may prefer a quick text message to answer a question.

Of course, no matter which channel you use, ensure that it's secure so that you're keeping client information confidential.

Invest in client communication training

Law firms should consider training to better understand and share how their lawyers can best support clients. Sharpening interpersonal skills can be helpful for lawyers, but it's also useful for all law firm staff when communicating with clients.

Laying out best practices and guidelines for client communication and sharing them with new paralegals, administrative assistants, and associates can ensure your firm creates a good first impression—no matter who clients meet with.

The ethics of client communication

Getting client communication right won't just help you receive more positive reviews and referrals—it'll also ensure you stay compliant with ethics rules. Lawyers have a duty to communicate case updates to their clients promptly. But as Megan Zavieh states, many ethics complaints start with clients feeling they aren't receiving sufficient communication from their lawyer.

Use client communication tools, such as online portals, to ensure clients are getting the updates they need, when they need them.

Additionally, lawyers are required to keep client information confidential—which means they must do their due diligence regarding any technology tools used at their firm. Ensure your communication channels are encrypted, and that you're keeping track of standards for keeping client information confidential.

Finally, take care to follow ethics rules when communicating with clients or potential clients via social media. For instance:

- Don't refer to yourself as an expert
- Be mindful of inadvertently creating lawyer-client relationships
- Never access or share confidential information via a social media platform

See a more extensive list of social media do's and don'ts.

Keeping client communications secure

Keeping client information confidential is critical, and with the advent of GDPR, it's become more important than ever for lawyers to educate themselves on best practices when it comes to technology.

Here are a few tips for keeping client communication secure:

- Encrypt all communications and communication channels.
- Keep personal and professional accounts separate on social media.
- Be mindful when working in public areas where others can see your screen.
- Ensure your clients and employees usestrong passwords.
- Consider a secure law firm client portal when sharing documents and sensitive information.

Communication throughout the whole client journey

Your client begins their experience with you long before they sign their engagement agreement. So, it's important to be conscious of how your firm communicates throughout the entire client journey.

Ensure your website and marketing materials are clear and engaging, so that potential clients don't get frustrated trying to find information. Also, ensure your client intake is smooth and painless so that clients feel cared for right from the start.

At the end of your client's journey, don't forget that bills are a valuable communication tool.Add detailed notes so they understand what they're being billed for—especially if they haven't worked with a lawyer before. You'll also want to clearly illustrate services you've written off, so clients see the full extent of the value you're providing, even if they're not being charged for it.

You should start and end your representation with formal documents. To begin, outline the scope of your services in a written letter of engagement. Then cleanly end representation with a closing letter to the client.

Finally, don't forget to ask for feedback from your client throughout their time with your firm. Chances are, no matter how well you're doing in terms of client communication, there's room for improvement. You won't know what to tweak unless you ask, though.

The bottom line: By putting your clients at the center of everything, you'll be that much better positioned to communicate intentionally, provide great experiences throughout their journey, and build a strong reputation for your firm.

Learn more about running a client-centered law firm.

Tools for effective client communication

For today's lawyer, there's a digital smorgasbord of options when it comes to client communication. Here are just a few options to help you level up client communication for your law firm:

Email

Effective email communication can help law firms efficiently keep clients informed and up to date. As a bonus, tools like Clio's Outlook 365 and Gmail integrations make it easy to ensure all client communications are logged to the appropriate case.

Whichever provider you choose, ensure that your communications are encrypted and secure.

Receptionist services

When you're missing a receptionist and an automated email or out-of-office message won't do, a receptionist service can help. Ruby Receptionists, for example, ensures all your business calls are answered, and it syncs calls and messages with Clio.

Texting

Client communications have evolved far beyond the formally written legal letter that's photocopied in triplicate and sent via snail mail. Today, it's not uncommon for lawyers to work with a client who prefers to text. Educate yourself on tools that meet these clients' preferences without sacrificing your privacy.

With text messaging in Clio Manage, you and your clients have a convenient way to answer questions and share updates, all without having to give out your personal phone number. For instance, you can:

- Send SMS text messages using a toll-free number assigned to your firm
- Receive SMS and MMS texts from contacts
- Add time entries
- Export conversations in PDF format
- Send automatic reminders for calendar events
- Send and receive intake forms, documents and e-signature requests

Client portals

To ensure client communications are completely protected, consider using a secure client portal to share information and news, send documents, and even invoice clients. Client portals give an extra layer of protection so you can rest assured knowing everything is being kept confidential.

Client portals can also help make client communications more efficient. For example, Nicholas Hite of The Hite Law Group gives clients the option to use Clio for Clients, a secure communication portal, so that they can access information related to their case on their own at any time. This helps clients feel empowered, and cuts down on time-intensive back-and-forth communications.

Tools like Hona provide a great option as well that makes it easy to keep clients up-to-date.

Client intake and client relationship management tools

You don't get a second chance at making a first impression. So, it's important to make sure your clients have a positive experience leading up to and during the intake process.

According to our latest *Legal Trends Report*, of all the law firms that our 2024 secret shoppers reached out to by email, just 33% responded, and only 52% answered the phone, highlighting a major gap in client communications—and a major opportunity to better meet client needs.

Using a tool to help solidify your firm's internal processes can also add a layer of polish and professionalism to client experiences from their point of view, making a big difference for your firm's reputation.

Clio Grow is client intake software that makes it easy to keep track of potential clients through the entire client intake process and to create a simple onboarding experience. It also syncs seamlessly with Clio to give your firm a more streamlined workflow for client management.

The final word on client communication

Improve how your firm communicates with clients, and you'll set yourself up to succeed long term. That's because better client communication means better experiences—which can lead to happier clients, positive reviews, and potential referrals for your law firm.

To recap, here are a few key tips to keep in mind to ensure you're communicating with your clients in the best way possible:

- **Listen**. Your clients are paying you for legal advice, but they're also paying you for peace of mind. Be attentive, ask questions, and clearly communicate the work you're doing, and your clients will see much more value in your services—making them much more likely to recommend you to others.
- **Put security first**. No matter how you communicate with your clients, it's critical to ensure you're doing it securely. Use strong passwords, be mindful of who can see your screen when sending emails in public, and always encrypt.
- **Take a client-centered approach**. Clients are used to incredible service from the likes of Amazon and Netflix, but many law firms have yet to take the same client-centered approach. Keep your clients top-of-mind when considering how, when, and what to communicate, and you'll be taking advantage of a big opportunity to help your firm stand out and become more profitable.

One last note on client communication: Don't be afraid to use technology and think outside the box to improve your client communication in your firm. Take time to think about what your clients need and experiment with new tools and processes. It'll make more of a difference than you'd expect, and you could see more success—and happier clients—than ever before. Try Clio for improved visibility for clients, efficient updates and more.

About Clio

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