How to Deliver a Client Experience That Recession-Proofs Your Law Firm

Kyle Ostrowski · Monday, March 27th, 2023

For many law firms, the “client experience” is simply about results: if lawyers win a case or close a deal, they consider that a positive experience. Resolving a problem is offering good client service. There’s more to creating a great experience.

Meeting basic client expectations for good service won’t be enough to stand out to new clients among your competitors. Instead, law firms need to find new ways to deliver a holistic client experience — spanning from first contact through the final bill — that will help you be distinctive from other firms, keep existing clients, and help your law firm weather a market downturn.

What does an exceptional client experience look like that will help you reach new prospective clients during an economic slowdown? Let’s take a look.

Make a great first impression on clients with a fast, efficient client intake process

The client intake process is likely your firm’s first substantive communication with a new client. And it’s a reputation-altering opportunity.

Your client intake process should be quick and painless. An automated process can collect all the information you need and populate it into other forms and systems so there’s less lag time while your staff manually enters client information. It can also schedule appointments and route people to the right contact so there is less friction for prospective clients. Advanced intake technology can also sift through leads to determine which are worthy of pursuit so you can prioritize them before they look elsewhere for help.

The right system will also allow your team to complete a thorough conflicts check quickly. It should also capture your clients' concerns so you can understand their goals and tailor your services to meet their needs. Whatever system you use, collect information about how clients find out about your services so you can focus your marketing dollars on those channels.

A smooth intake process is the first way that you can showcase to clients that you're able to meet their expectations. The longer and more painful your intake process, the more likely clients are to choose a different law firm.

Engage in regular client communication

Communication is the foundation of a positive client experience. No one likes to be left in the dark, wondering about the status of their case. And no matter how busy you are, clients don't like to hear that their call or email went unanswered because you were working on a different client's matter.

Clients expect regular communication, and they expect that communication to be thoughtful. (This means that your lawyers and staff should communicate with clients in plain language instead of legal jargon and offer clear explanations of what your clients can expect.) Whenever there's a development in your client's case, you should let them know about it in a timely fashion. And if your client emails or calls with a question, you should quickly acknowledge their concern, even if you don't have an immediate answer. Responsiveness can avoid conflicts and misunderstandings and strengthen the client relationship. You should also touch base regularly with your clients even if you don't have any significant news to report, so they know that their case is still on your radar.

But all of this communication can become tedious in a lawyer's busy day. Back-and-forth status emails and calls take a lot of time away from pressing legal work. Fortunately, there's an easier way to keep clients apprised of their case status.

A secure, cloud-based client portal makes it easier than ever to stay in touch with clients. An online portal allows clients to access the information they need at their convenience, whether it's a deadline, a document, or a bill. For example, an online portal allows clients to log in to view their current billing status and share and view documents. Some portals also offer a chat function that delivers automatic text notifications when new messages or other updates arrive, improving lawyers' responsiveness and raising client satisfaction because they won't have to play phone tag or go back and forth over email.

Ensure your billing processes are predictable and transparent

Transparency builds trust and strengthens the client relationship, which is essential when creating a client-centered practice. To deliver a good client experience with regard to billing, you need to explain your firm's rates up front. You should also set a budget that includes all anticipated fees so your client fully understands their potential financial outlay.

Many clients also prefer to understand their billing status before they receive a surprise in the mail. An online billing portal keeps clients updated so there aren't any unexpected expenses that can damage your relationship with clients.

You can also improve the client experience by offering a variety of payment options. Many clients enjoy the flexibility of making online payments through credit cards, eChecks, and digital transfer services like ACH. An online portal makes it easy to take these payments while expediting the firm's receipt of funds — you won't have to wait months for a check or hound clients for overdue payments.

Embrace legal technology now to improve your firm's performance in a recession

Your law firm should set a perpetual goal of improving your clients' experience — regardless of how the market is performing. And one of the easiest ways to increase your clients' satisfaction is by adding client-centric legal technology.

When the market is tight, law firms may initially question the expense of adding new tools. However, tech tools should be delivering savings in the short and long term. They can reduce manual work, improving employee satisfaction and reducing turnover. They can streamline the intake process so prospects don't have to wait as long for an initial lawyer contact. And they can ensure clients are always kept up to date about the status of their matters and bills.

Legal technology tools make it easy for clients to work with your law firm — and to share their positive client experience with others.

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