

# How to Provide Exceptional Customer Experience

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The core of conducting good business lies in placing customers at the forefront of everything you do. However, COVID-19 has caused considerable disruptions when it comes to delivering exceptional customer experiences in the ways firms are accustomed to. Most likely, in-person interactions have become scarcer at your firm to minimize the risk of spreading the virus, inevitably making initial first impressions with clients rather different. This is especially true if your firm depends on building rapport and trust that often comes from face-to-face interaction.

That said, delivering the best client experiences is still very much possible; the way it's done has simply changed and shifted with our digital-first world.

One way to keep them happy? Implement a client portal. Client portals help your staff keep real-time interaction with clients while creating a secure spot for any communication or questions. This also remediates phone tag and lets them know you're still right on top of their case with regular updates and information readily available.

Here are some tips on how you can execute on delivering great client experiences through a client portal:

## But First: Why Law Firms are Moving to the Cloud

For long-standing law firm partners out there, you may be wondering what's causing so many firms to move their operations to the cloud versus storing things on local hardware. The rapid need that erupted for remote work has created even more urgency around the conveniences of a cloud-based software solution – so everyone's on the same page and able to access client information safely and securely.

The ability to keep client data in one place creates alignment across your staff and makes information retrieval and updates doable in real-time. Plus, with so many fully integrated capabilities, you can keep track of billing, securely share files, and any notes from calls they have

with other staff members all at everyone's fingertips. That agility is much-needed in today's hybrid work environment, and a valuable asset when it comes to delighting clients and fostering a client-centric approach to your operations.

[Read more: Here are 10 mistakes to avoid when choosing cloud-based software](#)

Now that you better understand the value of cloud-based practice management software, let's jump into how to best implement client portals to deliver exceptional experiences for your customers so you get more referrals and continue to outdo your competition.

## Top Priorities When Implementing a Client Portal

In order to improve client communication and create a client-centric approach to your day-to-day tasks, here are some priorities you should keep in mind when setting up a portal:

### Focus on Storage

Most client portals come built-in with file storage attributed to each matter at your firm. The key is to make sure everyone uses the portal from the start of the case, so all paperwork, notes, and updates are logged for clients to take advantage of whenever it's convenient. It's a two-way street – a spot for clients to access things they may be wondering about in their case, but it's also a tool for staff to easily share files when used with law management software.

### Focus on Security

Between all the digital phishing and security breaches, hacking emails has become way more common. It's not worthwhile to risk your client's sensitive information from being compromised when a portal is a perfectly viable alternative to holding all their data in one place. The nice thing is they won't need to download anything additional to access – any internet-enabled device will be able to log on to view updates, and they'll receive a simple notification email whenever any new information becomes available. Security should always be at the forefront of your firm's mind so clients feel secure when interacting with you; it will create a smooth, positive experience that they'll be sure to recommend to others.

## Geographical Flexibility

Depending on your area of law, with a client portal, distance won't be nearly as much of an issue. Whether a client has temporarily relocated or your firm is currently working remotely, for the time being, everyone can be logged in and have access to all the necessary information on both sides. Not only is this more convenient, but it also creates a better place for client-centric interactions on an ongoing basis. Smoother communication and collaboration leads to better efficiency for everyone.

## Benefits of Setting up a Client Portal in a Client-Centric Model



While there are many law firms out there, there aren't many that successfully deliver a client-centric model for a superior customer experience. Having a synchronized staff empowered to always deliver and update clients in a way that keeps them feeling top-of-mind can be an essential, distinctive aspect that sets you apart from other firms. Client portals are a vital part of maintaining and nurturing that relationship – from the first conversation to the final bill, every touchpoint is of equal importance to maintaining a client-centric model.

## 24/7 Access to Documents, Deadlines, and Bills

This “always on” model is going to delight your clients. Anytime they're wondering about the status of their case, or if there's anything you need from them, they need only check the online portal. And if they're still uncertain about the status of something, contacting your firm is only one quick message away through the chat function. With readily available billing and documentation, there'll be no more need for constant calls or emails. Much like the rapid development of chatbots on sites,

this instant communication creates the very best experience for clients throughout their case.

## **Deliver Exceptional Customer Support and Experiences to Clients**

Client portals aren't a magical remedy to all client communication, but it certainly takes the back and forth out of emails. In order to build ongoing trust and exceed expectations, it's up to you to set the standard for client updates and communications. Consider sending out a weekly or bi-weekly update to your client, or having important dates of theirs (like a birthday, for instance) placed into your software so you can send nice, thoughtful messages instead of a strictly business transaction every time you talk. It's building these relationships – that you see clients as people deserving of empathy and care – that will let you use client portals to bring exceptional experiences to them every time.

### **Increases and Client Intake**

One of the longest processes during the lifetime of a client's case is the initial steps of onboarding. Despite modern advancements in digital technology, the intake paperwork and setting up their file can take a bit of time after their initial consultation. However, you can expedite this process considerably by spending less time having them sign on the dotted line and more time actively listening and talking them through the difficult parts that come with a legal matter. Most people are distressed and in need of guidance – so be that guidance, and use client portals instead to gather any other information that may be needed (with the exception of what's required to represent them, of course).

### **Improves Scheduling and Client Attorney Communication**

On the client end, it can feel like there's a long time spread out between updates on their case. With a client portal, you can help ease some of their uncertainties by sending them a message that will alert them via email on any updates that come through. Even if it's a quick message, this communication can go a long way in demonstrating you're willing to go the extra mile for them, even if it's a minor update. With these convenient communication tools, attorneys can easily get support from staff to schedule an update call without all the back and forth emails of "does this day work?"

### **Streamlines Billing and Accounting**

One of the biggest pitfalls that can occur when a client-attorney relationship starts is the lack of discussion around billing cycles. Before any official paperwork is signed, it's vital to set expectations on what billing schedule has been agreed on. Once that's established, a confidential and secure billing statement can be sent and updated for clients through the portal itself. This is a much smoother way of sending a statement that clients will appreciate being able to access rather than waiting on a bill in the mail. Plus, you'll get paid that much faster by having integrations that offer credit card payments through the system (how's that for ultimate convenience?).

## **Streamlined Communication and Collaboration Increases Efficiency**

When everyone is on the same page about what's happening, clients are happier and staff is able to deliver (and sometimes even overdeliver, in a perfect world). Things are always going to be busy, which is why now more than ever it's so important to set up a system and customer portal that encourages a secure way of sharing information and data around a case. A real-time system streamlines everything for added efficiency and peace of mind in light of many uncertainties currently happening. Everyone's happier, and things aren't forgotten about in a file or lost. It's all backed up in the cloud and available to view whenever desired. It's the true key to working smarter, not harder.

## **Implementing Client Portals at Your Firm**

When it comes to creating an exceptional customer experience at your firm, look no further than a client portal that keeps them up-to-date 24/7. Even when society goes back to in-person interactions more frequently, the benefits of a secure online portal will continue to be a useful tool for delighting customers at your firm throughout their case. This ["new normal"](#) has created some lasting changes – and firms must adapt to meet the demands of the modern customer.

If you're interested in the other benefits client portals to have to offer, please feel free to contact us for a no-obligation chat. We're passionate about helping firms enhance experiences with clients to truly set them apart from the competition.

Also, subscribe to our blog for future updates and information in the legal space.