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Why Your Law Firm Needs a Client Portal

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While modern technology has changed the way that many lawyers connect with their clients, it hasn't changed the fact that confidentiality is key when it comes to the attorney-client relationship.

In fact, the American Bar Association (ABA) [has addressed](#) the rise of [cybersecurity threats](#) (like hacking) with an attorney's ongoing obligation to safeguard confidential client information and communications. Not only do lawyers need to stay informed about the benefits and limitations of new technology, but they also need to try to [prevent unauthorized and inadvertent access to their clients' information](#).

So, how can you take advantage of the benefits of modern technology to optimize the client experience at your law practice and maintain your [clients' confidentiality](#) at the same time?

There's an easy answer: it's called a [client portal](#).

What is a law firm client portal?

A client portal is cloud-based legal software that creates a secure space for lawyers and clients to connect and share information about their cases while automating administrative tasks. It's a tool that helps you standardize representation so that you can consistently provide an excellent experience for every client, every time.

In the portal, both the attorney and client can upload, store, and share documents; [calendar appointments](#); set reminders for court dates; [send bills and make payments](#), and communicate easily via chat features and automated text messages. Using a centralized client portal also creates a digital client file that is easily referenced in future court hearings or meetings and ensures that all of the information shared is stored securely away from hackers and accidental exposure.

A client portal is a means to streamline and improve the client experience from beginning to end, to keep client data completely confidential, and to cut down on the overall cost spent on administrative tasks related to managing clients.

Why does your law firm need a client portal?

If you plan on staying competitive in the modern legal world, your law firm needs to [start using a client portal](#) to better manage current clients and increase client conversion through automation. You'll turn more potential clients into actual clients by looking at the data collected by the client

portal, and you'll save money by making your staff's job easier and faster.

A client portal is one of the easiest ways to get clients coming back for more because, aside from providing valuable analytics, it makes being your client easy. For example, it's a lot easier for a client to upload standardized [intake forms](#) and documents in a secure portal online rather than dealing with encrypting an email to their lawyer or sending confidential information without it. It's also easier than coming into the office, especially in the era of COVID-19. This makes a better overall client experience and saves time and effort on the part of the lawyer and administrative staff.

Portals also make it easy for clients to communicate with you, and that makes them more likely to have a positive experience. The client portal creates one place to easily send and receive messages to one another 24/7, so they won't need to call at inconvenient times or leave messages with administrative staff. Plus, lawyers won't need to give clients their private cell phone numbers. You and your clients can also easily review past conversations to quickly find information and maintain a record for the future.

With a client portal, law firms can streamline workflows, like legal billing and payment, which saves money for the firm. It's an easy way to send invoices to your client and to receive payments through a secure online system without needing the assistance of staff. Clients can download the bills at any time and send questions directly in the portal instead of calling the office and leaving messages. This leads to happier clients who feel informed about billing and organized at all stages.

A client portal is also a great way to give administrative staff access to all documents and a complete history of a client's representation. This helps staff in charge of billing, legal operations, and paralegal and investigative work do their job better without needing to go digging around the office and asking questions. A client portal also facilitates remote work, which can cut down on costs associated with office space and keep your entire staff working within one system.

Basically, a client portal doesn't just make you money because it makes clients happy. It also makes you money by cutting costs and increasing productivity across multiple different areas of the firm.

What features should a client portal have?

The point of the client portal is to optimize the client experience and streamline client management processes around the law firm. With that in mind, a great client portal should have the highest functionality and include the following features:

- a client profile tab with personal and case information;
- a place to upload documents;
- a client communication tool that enables you to converse with clients and store those conversations securely, like a chat function with automatic text notifications;
- conversation tracking and analytics;
- 24/7 client and attorney access to the portal;
- a billing tab to download and send invoices and a place for online payments; and
- a calendar populated with appointments, deadlines, and court dates, plus the ability to send reminders.

All of these elements should be included in a professionally designed portal that is customized with

law firm logos and colors to create a personalized touch.

Of course, a client portal must be intuitive and helpful, but the most important feature of a client portal (or any legal technology) is reliable security and firewall protection.

Law firms are not immune to data breaches. At the end of the day, lawyers must use due diligence to keep client data, online communications, and shared documents confidential. If they don't, they might risk breaching their ethical obligations and losing their clients' trust.

Computers are easily hacked, and cell phones are sometimes lost or stolen. Plus, in the era of remote work, there's a risk that lawyers and staff might opt to use piecemeal platforms or apps that you haven't vetted for security. You shouldn't assume that your email is secure either. Law offices are prime targets for hackers, given the valuable secrets they hold.

That's why it is more important than ever to shift to a client management model that includes a [secure client portal](#) with top-notch protective features, like encryption and two-factor authentication. These protections will safeguard confidential information and store data securely, so you'll never have to worry about someone stealing your client's data or taking the hit of a dreaded data breach.

How can a client portal assist with client intake?

There are [many ways](#) to upgrade your client intake process, but a client portal is a great first step.

A client portal can streamline client intake and standardize the client's first experiences with the law firm, so you're always putting your best foot forward. It's also a great way to automate administrative tasks and workflows related to intake while boosting productivity among other staff and reducing costs across the board. There's no reason to rely on outdated client intake practices when you have a client portal to make it easy and cost-effective.

Standardizing intake forms

For example, client portals make it easy to send [intake forms](#) for clients to fill out before your first meeting and for clients to enter personal identifying information all in one place. This data is usually populated in a larger system to cut down on data-entry-related tasks around the office. It also minimizes the time that each lawyer or staff member must spend meeting with and gathering information from a client.

Targeting ideal clients

Certain platforms can even track the [metrics](#) when it comes to intake, which is great for a [legal operations department](#) that works tirelessly to maximize resources and save money. Since intake starts from the moment a potential client reaches out to your firm, you can use the portal to track where potential clients are coming from and customize intake to target your ideal client. You'll also be able to look at the ROI on your marketing spend over time so that you get a clearer picture of the law firm's finances.

Automating conflict checks

Let's not forget that a client portal can automate [conflict checks](#) that are usually performed during

intake and conveniently generate a report that protects the confidentiality of your clients. Conflict checks can be costly and complicated for legal practices, but the power of computing makes it fast and simple with the right platform. Some even offer the ability to create a “virtual wall” to adjust permissions settings and prevent certain lawyers with a conflict in the office from accessing sensitive information on a particular case. This reduces the risk of accidental exposure and confidentiality breaches among coworkers.

Setting up client portal software

If you’re thinking about incorporating a client portal into your arsenal of practice management software to improve your client service, you should try out a [free demo](#) for an introduction to our platform. We’re happy to show you all the features so that you get comfortable with the functionality of our client portal and can see how it will help your law firm become more client-centered and profitable.

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