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9 Ways To Create an Effortless Legal Client Experience

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A recent survey asked just under 100,000 customers about a recent service interaction they had to gain better insights into customer loyalty. They found that exceeding customer expectations made nearly no difference in how loyal a customer was after the experience. So, contrary to popular belief, going above and beyond for a customer doesn’t actually create loyal customers for life. In reality, it’s expensive for a business to deliver beyond their means 100% of the time considering it clearly yields no more results than meeting expectations.

Yet while what you do beyond what’s expected of you may not make a huge difference, what *does* make a difference in customer loyalty is the amount of work you make them put in. The fact of the matter is people want to put in as little effort as possible if they're paying you for a service or product.

So, the secret is, if you can simplify your clients’ lives by making things as easy as possible while still managing to meet their expectations, you'll have a loyal customer for life.

The Key to Customer Loyalty is Reducing The Amount of Effort Your Clients Have to Put In

The amount of loyalty your legal clients will show you directly hinges on how easy you make it to work with you. People want to feel valued and connected to their lawyers every step of the way. The last thing they want is to be treated like just another number on the list, so if you can delight them by making it easy to get a hold of you and answer their questions as quickly as possible, it may not even matter if you get the best possible results on their case. What matters most to clients is speed, efficiency, and as little effort on their end as possible.

9 Ways to Give Your Clients a Low-Effort Experience

1. **Make it Easy To Communicate With You**

One of the most common complaints that people have about lawyers is poor communication. In a traditional law firm, it can be downright impossible to get a hold of a lawyer. Statistics show that 42% of the time law firms take an average of three or more days to get back to their clients. Needless to say, this is way too long of a delay.

Put yourself in your leads' and clients' shoes for a minute. If you're interested in purchasing a product or service from someone, you expect to be called back sooner than three days later, right? With so many competing law firms out there, clients are likely to forget about the law firm that didn't call them back and go with the lawyer that gets back to them as soon as possible.

Nobody is interested in playing phone tag. They expect to call or email a lawyer and get a response back, it's really that simple. The only way to meet the modern consumers' need for immediacy is to get back to them right away.

Yet, as any lawyer can tell you, a lawyer's job is extremely demanding. Between attending court dates, creating complex legal documents, and developing legal strategies for their clients, they don't always have time to step away from a paying client to pick up the phone or answer an email as quickly as people can stream a movie of their choice on Netflix.

Even if you have a front desk staff, getting back to every single client right away paired with all of the other administrative work it takes to run an office is impossible. After all, lawyers are people, not robots! This is where technology steps in to do what humans can not.

The highest performing law firms rely on automation to reply to leads and clients right away for them.

The right law firm client intake software and CRM for lawyers deliver an immediate response so that you never have to step away from a paying client again. Automated and personalized messages are sent out based on triggers of your choice that will delight and engage from day one.

Whether a potential client signs up for a newsletter or someone fills out a legal client intake form on your website, automation sends out an immediate reply. Your CRM will start tracking that lead meticulously from the very first day they contact your law firm so that your clients *never* have to chase you. Software tells you what steps need to be taken next ensuring that no opportunity gets missed And no clients have to sit around waiting for the lawyer to get back to them.

2. **Let Clients Check The Status of Their Case Any Time**

In a traditional law firm, clients must collaborate with their lawyers on their case according to their lawyers' terms. Yet no one wants to be at the mercy of their lawyer's erratic schedule and wait around to get a simple answer back.

3. **Don't Make Them Repeat Information**

One of the most common reasons why people hate calling customer service is because they dread being passed on to different departments and having to repeat the same issue over and over. The redundancy of having to repeat a problem sometimes upwards of three times is downright frustrating.

In the legal world, it can be extremely insensitive to ask your legal clients to repeat information over and over. Some legal matters are highly emotional, and asking clients to relive their problem over and over by answering the same questions isn't fair or professional.

Make it easy for your clients by ensuring that everyone on your staff is up-to-date with case details. A CRM for attorneys stores all case and contact details in one single database so that no matter who is answering the phone, they'll have the information they need and right in front of them.

4. **Make it Easy to Pay You**

Nowadays the modern consumer is accustomed to arriving at checkout and being given a wide range of payment options. Whether it's PayPal, installment options, or by credit card, people are now conditioned to being able to pay however they want. So, if the modern consumer is already used to being able to pay however they want for day-to-day transactions, why would paying their lawyer be any different?

A recent trends report showed that 65% of consumers prefer to pay with a credit card. So, for crying out loud make it easy for your clients and offer e-payment. First of all, most people don't have a $10,000 retainer lying around. Even if they do, it's probably tied up in investments. Besides, having to pay by cash or check is incredibly time-consuming for your clients. Asking your clients to manually fill out a check, put it in an envelope, and take it to the post office is high on the effort scale. The same goes for asking your clients to pay you face to face — *especially* during a worldwide pandemic. So, simplify things for your client and offer e-payment.

You should also seriously consider implementing payment plans that allow your legal clients to pay by automated payments or transfers. Chances are that some of your clients will have money constraints, so they'll greatly appreciate the offer to split payments up. By making payments as easy as possible for your clients, they'll be much more likely to return for repeat business, and refer you to their friends and family.

5. **Make it Easy to Sign Documents**

Part of the client intake process involves a lot of document signing. In many law firms that means a client needs to print, sign and scan or fax these documents back to their lawyer, or even drop them off at the post office. With so many steps involved, it can be a real hassle for clients to find time to do. Clients are understandably irritated having to go through all these processes to get something signed. This puts lawyers in a tough position since the longer it takes to sign important documents, the longer it takes to get the case rolling.

Offering an alternative and effortless way to sign legal documents can be a game-changer. Allow your clients to sign important paperwork on the go from wherever they are.

6. **Make it Easy to Schedule an Appointment**

Dreaded long drawn out emails back and forths are no one's idea of a good time. When all the client wants to do is schedule a consultation, but you can't seem to agree on a time that works for both of you, you're creating a substantial amount of friction in the client journey. Consider offering a simpler way to schedule appointments by offering a self-service option.

It's as simple as syncing your calendar to your legal CRM and sending a link to your clients. With direct access to your schedule, your clients can choose only the available times you want them to see that works best for their schedule thanks to automated appointment scheduling.

Not only are you making the scheduling process a million times easier for your clients, but you'll significantly reduce no-shows and scheduling conflicts. In most cases, your clients are busy people too. So, make their lives easier by keeping them informed by sending automated appointment reminders.

7. **Don’t Make Them Wait (For Anything)**

Clients want to be able to communicate with their lawyers and be able to ask what the status of their case is or request a document. Making your clients wait around to hear back from you is no good. what if you gave your clients the power to instantly collaborate with you whenever they want.

Allowing your clients to access any documents, notes, or messages at any time means your clients no longer have to play a waiting game when they have questions. A client portal gives your clients direct access to your firm, providing instant client service without costly bottlenecks that make clients feel forgotten!

8. **Communicate *Their* Way**

Not every client has the same communication style. Some people prefer the phone, while some people prefer texting. Instead of only giving your clients one way to get a hold of you, why not offer multiple channels. SMS for law firms gives your clients the power to communicate with you in the style that works best for them. Don't worry about having to scramble in multiple inboxes or through your phone to find your client's last message. Thanks to your CRM, you can see all of your client interactions in one place. from emails to text messages, it's easy to keep track of all your interactions, regardless of how the client got a hold of you.

9. **Make File Sharing Easy**

Nobody wants to have to dig through email attachments to find important files. Instead, make file sharing a smooth process.

An all-in-one centralized storage solution eliminates the need to track down files, and keeps them all in one place, making life considerably easier for your clients and you at the same time.

Simplifying your clients' lives as much as possible will ultimately win them over. If you can provide an effortless and streamlined error-free experience then you'll watch your customer loyalty skyrocket.

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