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# Legal Client Experience Report

What hundreds of survey responses and the largest legal client engagement data set reveal about the specific actions that drive happier clients and law firm success, including how firms use technology advancements, especially artificial intelligence, to modernize the client experience.

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# Legal Client Experience Report

PUBLISHED BY  **case status**



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The rise of on-demand services has permanently raised the bar for consumer expectations. Today's legal clients now expect their law firm to deliver the same level of transparency, instant access, and proactive status updates they get from companies like Uber and Amazon.

*Increasingly, clients also prefer to engage with brands through mobile apps.*

This evolution has created a significant client experience gap in the legal industry. Most law firms aren't set up to meet these evolving expectations. A mere 9% of firms offer a self-service mobile app that clients can use on-demand to access their case status, frequently asked questions, and documents. This may not be surprising when you consider that just 19% of the 109 attorneys surveyed describe their firm as as "tech-savvy." For some, changing "the way it's always been done" feels overwhelming.

The reality for many legal clients is an experience defined by uncertainty and waiting — marked by an over-reliance on traditional communication channels like phone calls, emails, and in-person meetings, little transparency, and long stretches of silence.

*But what if it could be different?* Imagine a legal client experience defined by **clarity and confidence** where clients always know where their case stands and trust their legal team to keep them in the loop.

Some firms have already cracked the code — and they're pulling ahead. There are three key factors that consistently drive client satisfaction:

- **Easy, on-demand access to case information and documents**
- **Effective, timely, and proactive communication**
- **Genuine feelings of trust and confidence**





These factors don't require a complete operational overhaul. Small shifts — like providing clients with 24/7 access to case information or proactively sending a message that says, "There are no new developments, but I'm on it" — can go a long way. With the right AI-powered legal technology, these touches happen automatically to delight clients while attorneys stay focused on what matters most: **practicing law**.

As a Thomson Reuters report states, "The market for law firm services has become far more competitive, shifting from a seller's market to a buyers' market, driven primarily by a dramatic change in client expectations." In other words: **If your firm isn't exceeding modern client expectations across the entire client journey, you'll lose business to one that is.**

This research confirms a clear hypothesis:

**Firms that modernize and measure the client experience to align with the expectations of today's clients achieve measurably better business outcomes.**

*Happy clients drive referrals, retention, and positive online reviews — creating a cycle of growth and increased revenue.*

# FIRMS THAT MODERNIZE AND MEASURE THE CLIENT EXPERIENCE TO ALIGN WITH THE EXPECTATIONS OF TODAY'S CLIENTS ACHIEVE MEASURABLY BETTER BUSINESS OUTCOMES.

**Happy clients drive referrals, retention, and positive online reviews — creating a cycle of growth and increased revenue.**



## This report aims to help law firms recognize and close the client experience gap by providing clarity on the specific actions that create happy clients.

Rather than relying solely on survey data from a broad pool of clients and attorneys — *many of whom may not be aware that AI-powered, self-service legal client engagement platforms exist* — we've combined survey insights with internal product usage data to provide a more complete picture of client-attorney communication behaviors based on what we're actually seeing among the multiple hundreds of law firms and hundreds of thousands of clients who have downloaded the Case Status app.

Never before has client experience been comprehensively studied as a standalone subject in the legal services market. Other research and industry reports have touched on elements of client experience, but usually within the heavier context of law firm case management operations. This report seeks to bring legal client experience out of the shadows and into the forefront.

*Our hope is that the benchmarks and takeaways in this report help you see what's possible when it comes to modernizing your client experience — so you can deliver clarity and confidence at scale to create happy clientele.*





# Methodology & Respondent Profiles

## DATA COLLECTION:

We took a three-pronged approach to data collection:

Independent survey of

**433**

law firm clients; we refer to this audience as “**clients.**”

*\*Shown in Green Boxes\**

Independent survey of

**109**

practicing attorneys; we refer to this audience as “**attorneys.**”

*\*Shown in Blue Boxes\**

Anonymized

**Usage Data**

from hundreds of thousands of law firms and clients using the Case Status platform; we refer to this audience as “**user firms.**”

*\*Shown in Navy Boxes\**

All survey data was collected in March and April 2025.

The Case Status data leveraged in this report was from calendar year 2024.

*See the appendix for full methodology and respondent profile details including data usage and privacy adherence.*



# KEY FINDINGS

This report surfaces three areas that are new and noteworthy: the client experience gap, the onset of client engagement-focused AI tools to drive client experience enhancements, and the rigorous mobilization of happy clients who stem from a 5-star legal services experience.

Each provides critical insights for law firms seeking to modernize their approach to client service.

## KEY FINDING #1

**Legal Services Has a Client Experience Gap.**

## KEY FINDING #2

**Law Firms Haven't Fully Harnessed AI Tools for Client Experience.**

## KEY FINDING #3

**Law Firms Must Mobilize Happy Clients to Become Active Promoters.**



## KEY FINDING #1

# Legal Services Has a Client Experience Gap.

Perception Gap

Measurement Gap

Operations Gap

Communications Gap

This research uncovered that the average law firm is falling short and failing to exceed client expectations — not because attorneys don't care, but because they're using outdated tools to fight modern battles. This is the "CX Gap," and it manifests in four important ways:

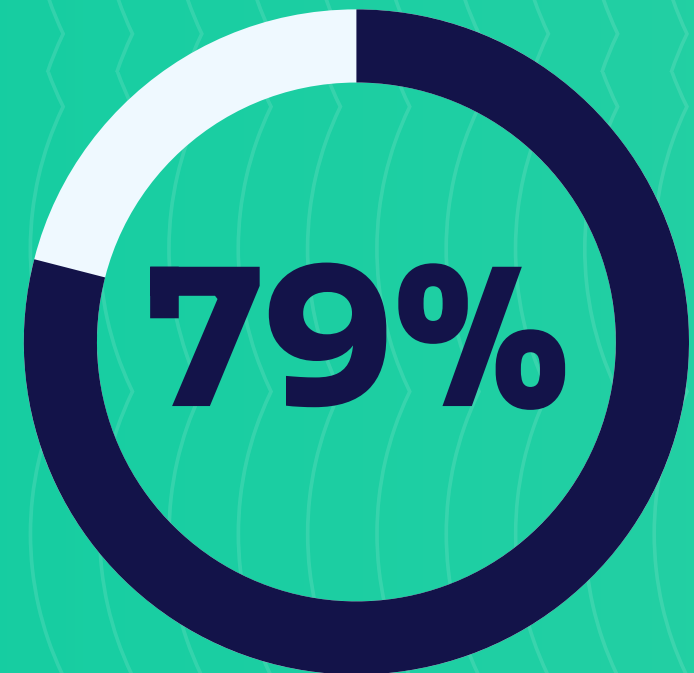
## 1. THE PERCEPTION GAP

A number of survey findings point to an uncomfortable truth: *attorneys perceive their firms more positively than clients do.* In fact, **72% of attorneys say their firm is "caring," but only 40% of clients used that adjective to describe the law firm they worked with.** An underlying cause of this perception gap is that firms aren't doing enough to solicit client feedback as part of measuring the end-to-end client experience. **Just 21% of surveyed clients say they felt "reassured that my legal team cared about my experience and asked for feedback."**



**Platform  
Data**

Legal client engagement platform data shows that when client feedback is collected regularly inside the app, user firms and their clients are in lock-step as to where the relationship stands. Without objective data, firms rely on their perceptions. With objective data, firms see things as they truly are and can take proactive action to nip brewing problems in the bud before a client becomes angry and could negatively impact firm reputation.



**of law firms clients  
feel uncared for**

# 72%

of attorneys  
say their firm  
is “caring”

# 40%

of clients  
say their  
legal team  
is “caring”

Attorneys

Clients

**The  
Perception  
Gap**

## 2. THE COMMUNICATIONS GAP

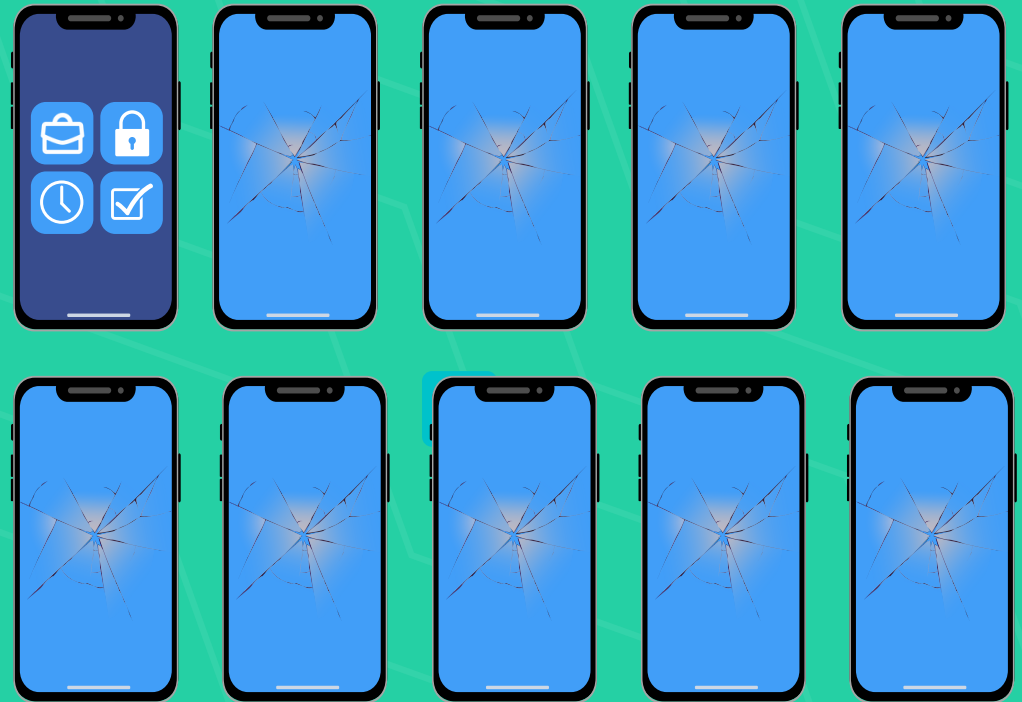
Firms are most likely to communicate with clients via phone calls, emails, and in-person meetings — channels that don't provide clients with the on-demand information or proactive case status updates they expect. A mere 9% of firms offer a self-service mobile app to clients in spite of [research](#) that states consumers spend five hours a day on their smart device, and 93% of that time inside apps. What's more, since clients have no self-service tool that allows them to access case information in their time of need, they frequently call and email their law firm looking for case status updates ([see page 35](#)).



Legal client engagement platform data shows that when user firms offer their clients a highly-rated mobile app to view case status, legal documents, and frequently asked questions, firms can see adoption rates of over 80%, resulting in an average of 1,329 hours saved annually per firm.

*CONSUMERS SPEND FIVE HOURS A DAY ON  
THEIR SMART DEVICE, AND 93% OF THAT TIME  
INSIDE APPS*

**A MERE 9% OF FIRMS  
OFFER A SELF-SERVICE  
MOBILE APP TO CLIENTS**





### 3. THE MEASUREMENT GAP

Only 7% of surveyed law firms track client NPS. This is in stark contrast to the two-thirds of Fortune 1000 companies that leverage this metric to understand client sentiment. This means that **93% of firms don't have a systematic way of understanding which clients are likely to recommend** the firm (promoters) and which clients are likely to damage the firm's reputation (detractors). Of the eight firms that do track NPS, the average self-reported score was 55.5. (NPS scores are reported with a number from -100 to +100; the higher the score the better.) The legal services industry is often left out of industry comparisons because there just isn't a lot of data to pull from. However, one source that does track legal services NPS, ClearlyRated, has the space oscillating between 26-42 over the last five years; this is comparable to the commercial airline industry.



Legal client engagement platform data shows that user firms are running with an average NPS of 65, which is considered excellent and knocking on the door of world-class. And since the app automatically asks clients for feedback, 100% of user firms track NPS.



**66% of Fortune 1000 companies measure NPS to understand client sentiment.**



**7% of surveyed law firms track client NPS**

# THE MEASUREMENT GAP

**93%**  
don't measure NPS



Law Firm average over  
the past 5 years

**7%**  
measure NPS



**Firms who invest in  
client engagement**  
(>50 is Excellent)

  
Ethical-ish

<20

20  
to  
40

40  
to  
70

70+

  
World Class

# NPS

-100

+100

## 4. THE OPERATIONS GAP

Operationally, firms are not controlling areas of team execution — like response time and case resolution time — that could bring forth a better client experience. **Law firms that decrease response time and total case time can favorably impact NPS.**

Improvement begins by even just measuring these metrics. The survey data shows that only 35% of firms measure response times as it relates to client experience.

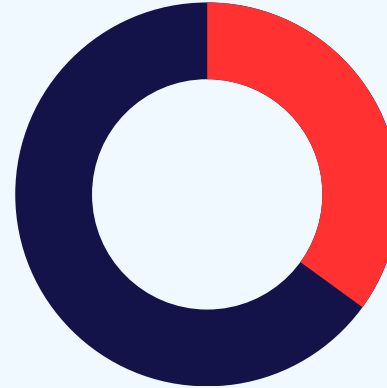
Additionally, only 25% of firms measure case resolution time (total case time).



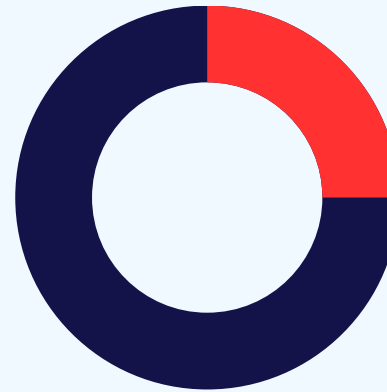
### Platform Data

Legal client engagement platform data shows a direct correlation between response times and NPS; the shorter the response time, the higher the NPS.

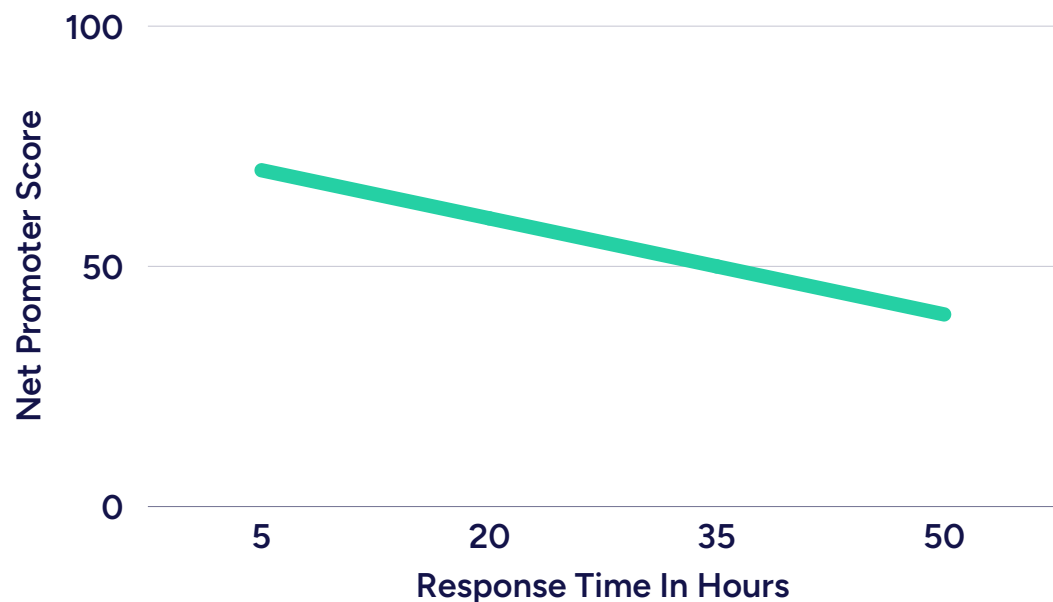
The data also shows a direct correlation between “time-on-desk” (total case time) and NPS; the shorter the total case time, the higher the NPS



**Only 35 %**  
of Firms Measure  
Response Time

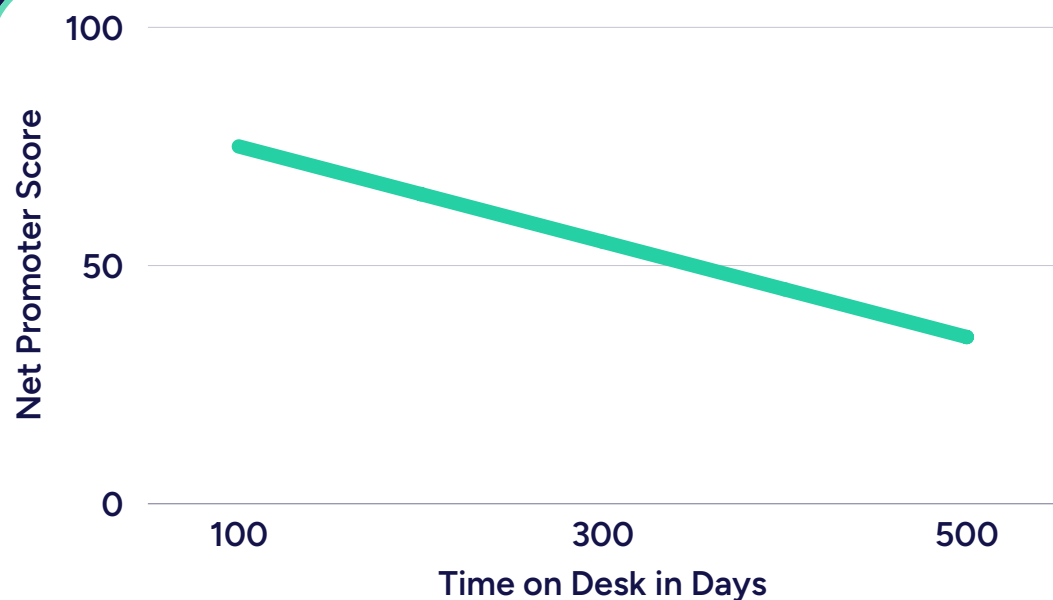


**Only 25%**  
Of Firms Measure  
Case Resolution Time

Platform  
Data

## Net Promoter vs. Response Time

The shorter the  
response time,  
the higher the NPS

Platform  
Data

## Time on Desk vs. Net Promoter

The shorter the total  
case time, the higher  
the NPS



## KEY FINDING #2

# Law Firms Haven't Fully Harnesses AI Tools for Client Experience

You don't have to look toward other industries to see the impact of AI. Legal technology is adopting AI at a high rate for various activities: e-discovery, case management, summarization, form fills, document summarization, demand letters, etc. The prevalence of AI-powered legal tools shows that attorneys and their teams are open to doing administrative work faster. The survey data confirms attorneys' openness to using AI technology — **firms use AI to handle the top 10 most common client outreach reasons**, from "billing and payment questions" to "appointment scheduling."

While this openness to adoption is positive, survey data also shows that firms haven't yet put AI fully to work for their client engagement in a scalable, impactful, or consistent way. Firms that adopt AI just to check a box won't see the same outsized results as those that adopt AI strategically across the end-to-end client experience.

## **A KEY TO USING AI STRATEGICALLY, AND AT SCALE, IS TO USE IT WHERE THE WORK IS ALREADY TAKING PLACE.**

For example, firms looking to increase client satisfaction can implement an AI-powered legal client engagement platform (CX AI) that integrates with their case management system (CMS) rather than cobble together disparate AI tools. CX AI has two key benefits:



# #1

**CX AI CAN MINIMIZE LEGAL ADMINISTRATIVE WORK AND ACTUALLY IMPROVE CLIENT EXPERIENCE.**

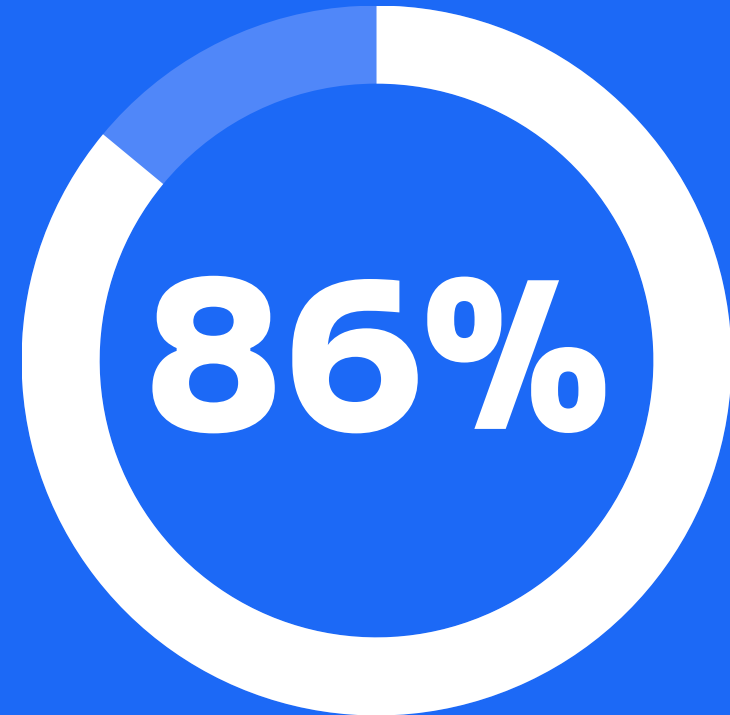
# #2

**CX AI GIVES VISIBILITY INTO METRICS THAT HELP MANAGE RESPONSE TIMES AND CLIENT SENTIMENT.**

## CX AI CAN MINIMIZE LEGAL ADMINISTRATIVE WORK AND ACTUALLY IMPROVE CLIENT EXPERIENCE.

According to surveyed attorneys, two of the top three reasons clients contact the firm are “basic frequently asked legal questions” and “case status update” ([see page 35](#)). **As a result, 86% of surveyed attorneys use phone or email daily to update clients on their case status.** Not only does replying to frequent phone calls and emails eat up hours of time, *it also creates an administrative burden as legal staff manually log those interactions inside the case management system.*

Although there are myriad AI-powered tools available to reduce firms’ burden, most are not available at the point where client engagement work gets done; further, many don’t integrate with the firm’s CMS. For example, AI can be used to translate messages between the legal team and clients. But often, translation tools are not available at the point where messages are sent or received. Large language models (LLMs) like ChatGPT can be used to draft and refine messages, but must be prompted effectively with lots of cutting and pasting to and from the editor. **In both cases, firms wind up manually logging communications inside their CMS.**



**of surveyed attorneys  
use phone or email  
daily to update clients  
on their case status**



LEGAL CLIENT ENGAGEMENT  
PLATFORM DATA SHOWS THAT  
WHEN USER FIRMS USE AI-  
POWERED MESSAGING THAT  
INTEGRATES WITH THE FIRM'S  
CASE MANAGEMENT SYSTEM,  
FIRM STAFF SAVE VALUABLE  
TIME, TO THE TUNE OF...

1,329

HOURS SAVED ANNUALLY, ON AVERAGE.



## AI GIVES VISIBILITY INTO METRICS THAT HELP MANAGE RESPONSE TIMES AND CLIENT SENTIMENT.

When firms are bogged down with administrative tasks (including copying and pasting text from AI tools into emails and text messages) clients are left to wait for replies, and sit with feelings of uncertainty as the hours tick by. **In fact, 1 in 4 surveyed clients felt anxiety about not knowing what was happening with their case** ([see page 39](#)).

While the average self-reported response time among surveyed attorneys was “within 4 hours,” which is fairly quick, **just 35% of surveyed firms measure response time**. And since just 1 in 3 surveyed clients felt relief when they got fast answers to their questions ([see page 39](#)), it’s reasonable to infer that **attorneys who lack objective data might be overestimating the speed in which they reply**.



**1 IN 4 CLIENTS FEEL ANXIETY ABOUT NOT KNOWING WHAT IS HAPPENING WITH THEIR CASE.**



Legal client engagement platform data shows that user firms that use CX AI reply faster than legal industry averages. User firms see an average response time of 5.29 hours, while average response times can take anywhere from a few hours to a few days, *according to multiple published studies*. Built-in AI-assistance capabilities enable attorneys to simply review suggested messages and hit send, while the platform automatically logs the communication and syncs back to the case management system. As stated earlier, there's a direct correlation between response times and NPS, **meaning that CX AI enables attorneys to decrease client waiting and uncertainty, resulting in higher client satisfaction, which translates to higher NPS.**

**CX AI ENABLES  
ATTORNEYS TO  
DECREASE CLIENT  
WAITING AND  
UNCERTAINTY,  
RESULTING IN  
HIGHER CLIENT  
SATISFACTION,  
WHICH  
TRANSLATES TO  
HIGHER NPS.**



## KEY FINDING #3

# Law Firms Must Mobilize Happy Clients to Become Active Promoters

Happy clients who leave positive online reviews are vital to business growth. Highly successful firms don't just exceed client expectations — they mobilize their happy clients to become promoters who actively promote the firm and reduce the impact of potential detractors who negatively influence online reputation. **Emotion is the fundamental driver that determines whether a client becomes a promoter or a detractor.** A client's decision to leave a positive online review is primarily influenced by how the experience made them *feel* — not just the legal outcome.

According to surveyed clients, most law firms are meeting client needs. However, only 1 in 3 firms are "exceeding" client needs ([see page 53](#)). It stands to reason that the 1 in 3 firms that are exceeding client needs are creating promoters, while the remaining 2 in 3 firms are creating passives and detractors. **In today's competitive legal market, simply meeting client needs isn't enough. Firms must deliver a 5-star experience and exceed clients' needs in order to create promoters who evangelize the firm.**



1 in 3 firms that are  
exceeding client needs  
are creating promoters.



The remaining 2 firms are  
creating passives and  
detractors.

## THIS STUDY IDENTIFIED THREE EMOTIONS THAT MOTIVATE CLIENTS TO LEAVE POSITIVE ONLINE REVIEWS:

- ▶ 53% of surveyed clients report feeling "**trusted** that my legal team cared about my experience and asked for feedback."
- ▶ 52% of surveyed clients report experiencing "**relieved** when I received proactive case updates."
- ▶ 48% of surveyed clients report feeling "**reassured** by on-demand access to case status and documents."

## CONVERSELY, THE STUDY ALSO IDENTIFIED THREE NEGATIVE EMOTIONS THAT MOTIVATE CLIENTS TO LEAVE NEGATIVE ONLINE REVIEWS:

- ▶ 37% of surveyed clients report feeling "**neglected** because my case didn't seem to be a priority."
- ▶ 26% of surveyed clients report experiencing "**confused** about where to find documents and case information."
- ▶ 23% of surveyed clients report feeling "confusion about the legal process and next steps" or "**frustrated** with slow response times."

BY CREATING POSITIVE EMOTIONAL EXPERIENCES THAT DRIVE CLIENT ADVOCACY — AND BY USING CX AI TO SCALE THOSE EXPERIENCES, MEASURE CLIENT SATISFACTION, AND COLLECT REVIEWS — FIRMS CAN TRANSFORM THEIR CLIENT BASE INTO A POWERFUL MARKETING ENGINE.

# EMOTION

is the fundamental driver that determines whether a client becomes a promoter or a detractor



## TRUSTED

that my legal team cared about my experience and asked for feedback.

## RELIEVED

when I received proactive case updates.

## REASSURED

by on-demand access to case status and documents.

Three emotions  
that motivate  
clients to leave  
positive online  
reviews

Three emotions  
that motivate  
clients to leave  
negative online  
reviews



## NEGLECTED

because my case didn't seem to be a priority.

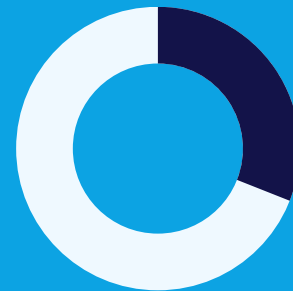
## CONFUSED

about where to find documents and case information.

## FRUSTRATED

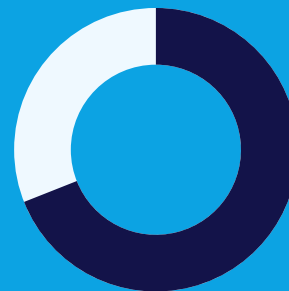
with slow response times.

But despite the clear business benefits, only 31% of surveyed attorneys use automation or technology to collect client reviews at their firm. That means the other 69% must remember to ask clients to leave a review — then manually check online review sites to see if they did it.



**31%**

of surveyed attorneys use automation or technology to collect client reviews at their firm.



**69%**

must remember to ask clients to leave a review — then manually check online review sites to see if they did it

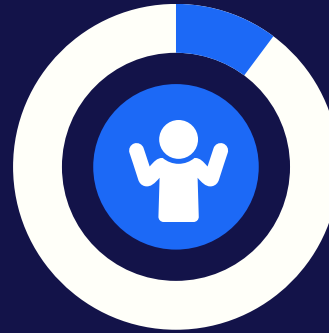
**ONLINE REVIEWS ARE SIMPLY TOO IMPORTANT TO A FIRM'S MARKETING STRATEGY TO BE TREATED SO CASUALLY.**

## **CX** Platform Data

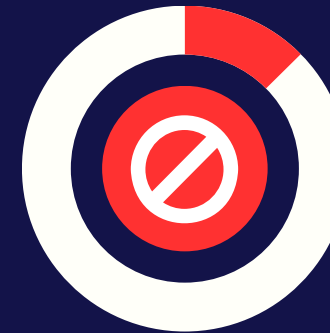
Legal client engagement platform data shows that user firms that use CX AI to systematically create these key positive emotional experiences and collect reviews from their happy clients see dramatic improvements in online reviews. User firms have an average Google rating of 4.5 stars. Additionally, they're able to collect reviews at scale; 161 Google reviews on average are collected annually per firm. And while just 7% of surveyed attorneys track how many promoters, passives, and detractors they have, 100% of user firms have promoter-passive-detractor data. On average, user firms' clientele comprises 77.3% promoters, 10.2% passives, and 12.6% detractors.



**77.3% PROMOTERS**



**10.2% PASSIVES**



**12.6% DETRACTORS**



**USER FIRMS HAVE AN  
AVERAGE GOOGLE  
RATING OF 4.5 STARS**



**161 GOOGLE REVIEWS ON  
AVERAGE ARE COLLECTED  
ANNUALLY PER FIRM**





# Full Report

DISCOVER ADDITIONAL SURVEY RESPONSES  
AND DATA-BACKED RECOMMENDATIONS

## KEY FINDING #1 EXTENDED

# The Legal Industry's Client Experience (CX) Gap

One goal of this study is to examine the legal client experience through the eyes of both attorneys and legal clients in order to identify misalignments that firms should be aware of. Analyzing survey answers from those two audiences reveals a theme: The legal industry has a client experience gap. This CX Gap manifests in four ways:



**CX Perception  
Gap**



**CX Communication  
Gap**



**CX Measurement  
Gap**

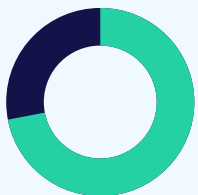


**CX Operations  
Gap**

## THE CX PERCEPTION GAP

The client experience perception gap represents the measurable difference between how law firms believe clients perceive their services and how clients actually experience them. This disconnect creates a significant blind spot that prevents firms from addressing real client concerns, often leading to reduced client satisfaction, missed review and referral opportunities, and impaired firm growth.

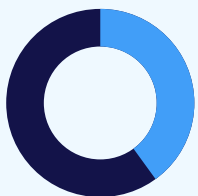
## DO YOU THINK YOUR CLIENTS FEEL CARED FOR?



**72%**

of surveyed attorneys say their firm is “caring”

BUT ONLY



**40%**

of surveyed clients used that adjective to describe the law firm they worked with

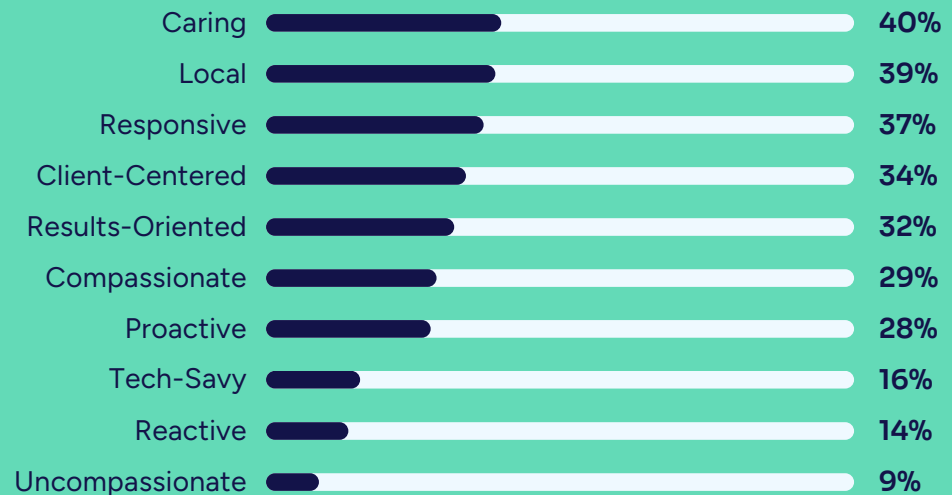
### ATTORNEY DATA:

#### WHICH OF THE FOLLOWING ADJECTIVES, IF ANY, DESCRIBES YOUR FIRM?



### CLIENT DATA:

#### WHICH OF THE FOLLOWING ADJECTIVES, IF ANY, DESCRIBES THE FIRM YOU WORKED WITH?



With such a great deal of misalignment, we can infer that firms aren't doing all they can to measure the client experience to deeply understand how their clients *feel*. If they were, there would be less deviation between the two surveyed audiences.

*Do you think your clients feel cared for?*

*What data do you have to support your answer?*

If you don't have hard evidence to back your answer, your firm is operating on opinion, not fact. This perception gap and lack of factual data create significant business risk. While firms may **believe** they're delivering exceptional service, clients who experience a different reality are quietly making decisions that inform online reviews and referrals based on their actual experience, not the experience the firm thinks it's providing.

Additionally, we see significant deviation in perception around responsiveness (how quickly a firm responds to client calls and messages). This is particularly concerning because response time directly affects client anxiety levels. 1 in 4 surveyed clients report feeling anxiety because they don't know what's happening with their case ([page 38](#)). When firms believe they're being sufficiently responsive but clients feel differently, the resulting anxiety can permanently color the client's perception of the entire legal experience, regardless of the case outcome. In the best case, negative perceptions result in low NPS and low likelihood of recommending the firm to others. In the worst case, negative perceptions can lead to bar complaints.



**28%**

**of clients describe  
their firm as proactive**

In addition to replying to incoming messages as quickly as possible, firms should also communicate proactively to meet the expectations of modern clients who are used to receiving push notifications to their mobile devices if their Uber Eats delivery is on the way or if their bank has a new policy update. Yet just 28% of clients describe their firm as proactive.

Overall, these client responses indicate that many law firms are doing an adequate job. Still, attorneys are a competitive bunch: they don't want to be adequate, they want to be excellent — and today's competitive legal landscape demands it. The unfortunate reality, according to this report, is that the average law firm is not currently delivering an excellent client experience.

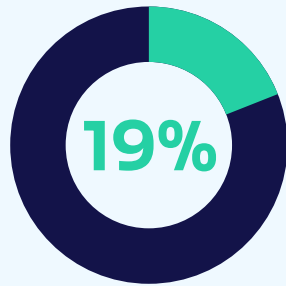
## WHAT'S CAUSING THIS PERCEPTION GAP?

There are two primary factors that underpin the perception gap: **lack of law firms being tech-forward and inadequate client feedback collection.**

# THE AVERAGE LAW FIRM IS NOT CURRENTLY DELIVERING AN EXCELLENT CLIENT EXPERIENCE.



## LACK OF LAW FIRMS BEING TECH-FORWARD



**Just 19% of surveyed attorneys describe their firm as “tech-savvy.”**

This prevalent lack of technological acumen may account for why so few clients perceive their firm as “responsive” and “proactive.” New legal technology exists that helps firms improve responsiveness and proactivity, but non-tech-savvy firms might not know about it. And by failing to meet client expectations in this regard, firms inadvertently send the message that they don’t care, even though they clearly do.

Regardless of respondent age, the report uncovered an eye-opening insight: even the firms that consider themselves tech-savvy may not be using technology to its full potential: **48% of surveyed attorneys who describe their firm as “tech-savvy” say that one of the top three reasons clients contact them is to ask basic legal FAQs.**

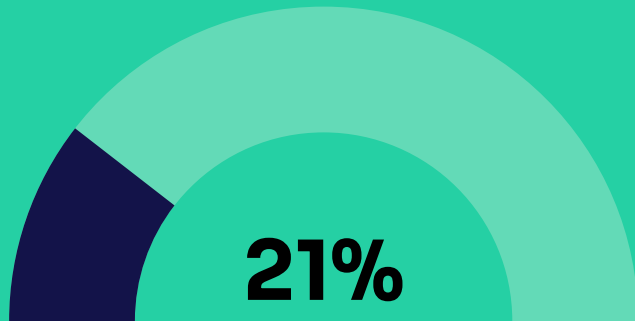


**48%**

**of surveyed attorneys who describe their firm as “tech-savvy” say that one of the top three reasons clients contact them is to ask basic legal FAQs.**

If clients are still frequently reaching out with basic legal FAQs, it raises the question: *How “tech-savvy” are these firms really?* Technology, when implemented correctly, should help clients self-serve for simple inquiries — saving time for both the client and the legal team. The fact that nearly half of these firms are still fielding basic questions points to a disconnect between their self-perception and the actual client experience. It’s possible that while these firms are using some modern tools, they may not be using them in ways that fully meet the expectations of today’s clients.

## INADEQUATE FEEDBACK COLLECTION



**Just 21% of surveyed clients say they felt “reassured that my legal team cared about my experience and asked for feedback.”**

It’s safe to infer that the other **79% didn’t feel reassured** — and didn’t feel as if their legal team cared enough to ask for feedback.

**Firms that aren’t regularly soliciting, measuring, and acting on client feedback across the end-to-end client experience are at a disadvantage.**



Legal client engagement platform data shows that when client feedback is collected regularly inside the mobile app, **client users and law firm users are in lock-step as to where the relationship stands.** Without objective data (inside a single source of truth that’s easily accessible for all parties), firms rely on their perceptions. With objective data, firms see reality and can take proactive action to address brewing problems before a client becomes truly angry and might negatively impact firm reputation.

## THE CX COMMUNICATION GAP

The client experience communication gap represents the disconnect between how law firms prefer to deliver information and how clients prefer to receive information. This misalignment creates friction in the attorney-client relationship, with firms using legacy channels that are convenient for their internal workflows, but often frustrating and inefficient for clients who expect the same seamless mobile-first experience they receive from other service providers.

## STILL PLAYING PHONE TAG?

THE TOP 3 CHANNELS LAW FIRMS USE TO COMMUNICATE WITH THEIR CLIENTS ARE:



**PHONE CALLS**



**EMAILS**



**IN-PERSON MEETINGS**

### ATTORNEY DATA:

#### WHICH COMMUNICATION CHANNELS DO YOU USE WITH YOUR CLIENTS?



Today's clients expect real-time access to information inside highly-rated mobile apps. Yet, law remains a game of phone and email tag. The vast majority of surveyed law firms depend on legacy, fragmented communication channels that fall short of modern expectations.



**STILL, 4 OUT OF 5 ATTORNEYS STRONGLY BELIEVE THEIR FIRM'S TECHNOLOGY HELPS THEM DELIVER ACCESS TO JUSTICE.**

*If this were truly the case, we'd expect to see more positive sentiment from clients.*



Even though firms may be “getting the job done” with legacy, fragmented communication channels (and other disparate tools), they aren’t meeting clients where they’re at. A preference for mobile-first interactions is especially strong among digital natives (those who grew up using the internet, smart phones, and apps). In the client survey, **45% of respondents fall into the millennial or Gen Z generations** (page 62). Relatively soon, digital natives will make up the majority of your clientele.

This demographic shift represents a fundamental challenge for law firm leadership. As millennials and Gen Z clients become a larger customer base, their expectations aren't shaped by legal industry standards but by their daily experiences with companies like Uber, Amazon, and DoorDash. For attorneys running firms, this means the competitive landscape is expanding beyond other law firms to include the client experience benchmarks set by technology leaders. *Firms that ignore these shifting expectations risk being perceived as outdated and inaccessible, regardless of their legal expertise.*

Widespread research states that consumers spend five hours a day on their smart device. A [DataReportal study](#) found that 92.5% of that time is spent inside mobile apps. Yet in spite of widely-documented consumer preferences that indicate a desire for mobile-first experiences, **a mere 9% of surveyed firms offer a self-service mobile app to their clients.**



**FIRMS THAT IGNORE THESE  
SHIFTING EXPECTATIONS RISK  
BEING PERCEIVED AS  
OUTDATED AND  
INACCESSIBLE, REGARDLESS  
OF THEIR LEGAL EXPERTISE.**

## ARE LEGACY COMMUNICATION CHANNELS DAMAGING CLIENT TRUST AND CONFIDENCE?

An over-reliance on traditional communication channels creates a negative snowball effect:

CLIENTS CAN'T EASILY ACCESS INFORMATION AND DOCUMENTS ON-DEMAND.



CLIENTS FEEL UNCERTAIN AND REACH OUT BY EMAIL, PHONE, OR TEXT FOR ANSWERS.



LEGAL TEAMS GET BOGGED DOWN IN A HIGH VOLUME OF ONE-OFF COMMUNICATIONS.



CLIENTS MUST WAIT AROUND FOR THEIR BUSY ATTORNEY TO REPLY TO THEIR INQUIRY.



UNCERTAINTY AND WAITING CHIP AWAY AT CLIENT TRUST AND CONFIDENCE LEVELS.



CLIENTS START TO FEEL AS IF THEIR LAW FIRM DOESN'T CARE.



CLIENTS ARE MORE LIKELY TO LEAVE NEGATIVE ONLINE REVIEWS.



### Platform Data

Modern legal technology solves this. It gives clients a way to access answers, updates, and documents directly from their mobile device without needing to speak with their attorney. And when clients can access their legal data independently, time on desk reduces, which benefits the firm's bottom line.

Legal client engagement platform data shows that when user firms offer their clients a self-service mobile app, firms can see adoption rates of over 80% — or 1,329 hours saved annually per firm.

### FIRMS CAN SEE ADOPTION RATES OF OVER

# 80%

WHEN USER FIRMS OFFER  
THEIR CLIENTS A SELF-  
SERVICE MOBILE APP



## THE CX MEASUREMENT GAP

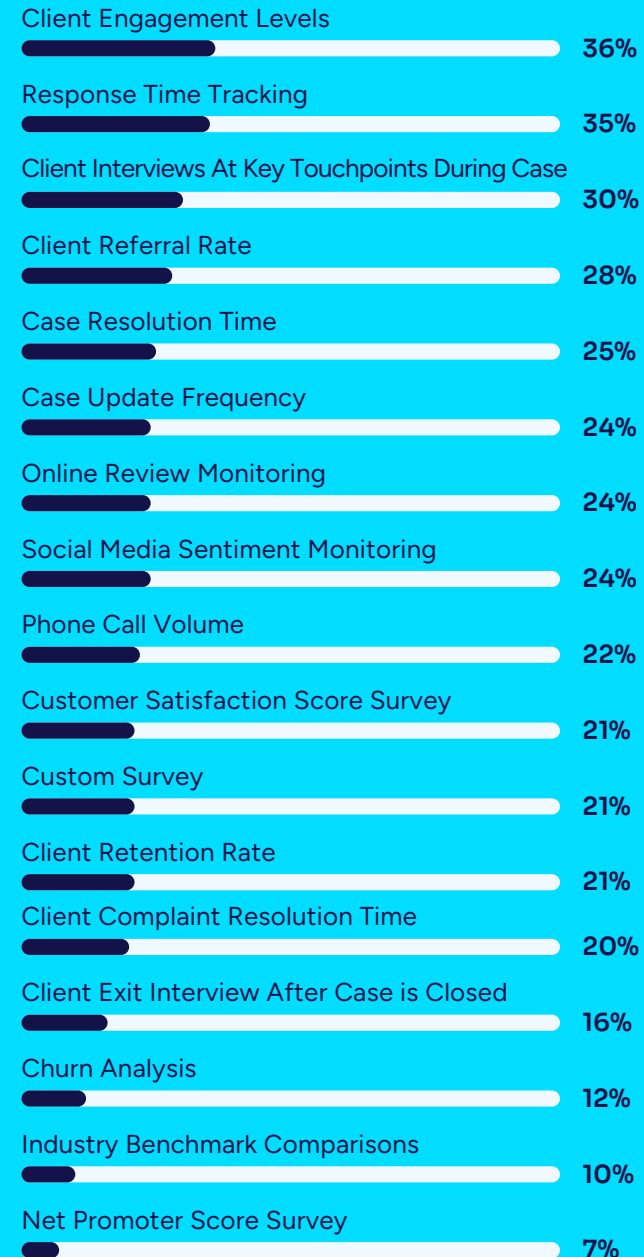
The client experience measurement gap represents the vast disconnect between the actions firms take to measure client engagement and the comprehensive client data needed to truly understand client engagement across the end-to-end client experience.

### IF YOU'RE NOT MEASURING THE CLIENT EXPERIENCE, YOU'RE FLYING BLIND.

While 79% of surveyed attorneys say they regularly measure their client experience with the goal to improve it, only 7% of surveyed law firms track client NPS. This means that 93% of firms don't have a systematic way of understanding which clients are likely to recommend the firm (promoters) and which clients are likely to damage the firm's reputation (detractors). This is in stark contrast to the two-thirds of Fortune 1000 companies who leverage this metric to understand client sentiment.

#### ATTORNEY DATA:

#### WHICH METHODS, IF ANY, DO YOU CURRENTLY USE TO MEASURE YOUR CLIENT EXPERIENCE?





## CLIENT DATA:

### WHICH OF THE FOLLOWING EMOTIONS, IF ANY, DID YOU EXPERIENCE DURING YOUR LEGAL CASE



You can't manage what you don't measure, and inadequate measurement of client engagement data across the client lifecycle leaves firms with dangerous blind spots. Surveyed clients say their firms aren't regularly collecting client feedback.

### WITHOUT REGULARLY COLLECTING FEEDBACK AT SCALE, FIRMS WIND UP UNAWARE OF THE EMOTIONS THEIR CLIENTS ARE EXPERIENCING THROUGHOUT THEIR CASE

This measurement gap manifests itself as a lack of trust and confidence.



ONLY 1 IN 2 CLIENTS  
FEEL **TRUST** IN THEIR  
ATTORNEY'S EXPERTISE.

WORSE, ONLY 1 IN 3  
SURVEYED CLIENTS  
FEEL **CONFIDENCE**  
THAT THEIR LEGAL  
TEAM IS HANDLING  
THEIR CASE WELL.



Even though attorneys must obtain an advanced education, pass the rigorous Bar Exam, and take an oath to uphold justice, levels of trust and confidence are low amongst law firm clients. When you look below the top two responses, you see a client experience that's rooted in uncertainty and waiting: not knowing what's happening with their case, not getting proactive case updates, slow response times, and little opportunity to share feedback. When firms solve these issues, trust and confidence levels will naturally rise.

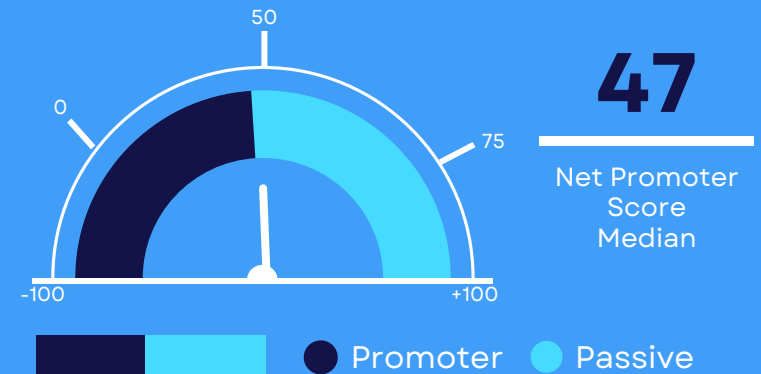
When it comes to benchmarking NPS, the legal services industry is often left out of industry comparisons because there just isn't a lot of data to pull from. However, one source that does track legal services NPS, ClearlyRated, has the space oscillating between 26-42 over the last five years; this is comparable to the commercial airline industry. **Of the eight firms that do track NPS, average NPS among surveyed attorneys is 56.**

**CX** Platform Data

Legal client engagement platform users all measure NPS throughout the client lifecycle. The platform data shows that user firms are running with an **median NPS of 75**, which is crossing from what is considered excellent into what is considered world-class. The app, or any consistent NPS monitoring tool, makes it simple for the client to give the firm feedback and is easy for the firm to configure to automatically capture the data.

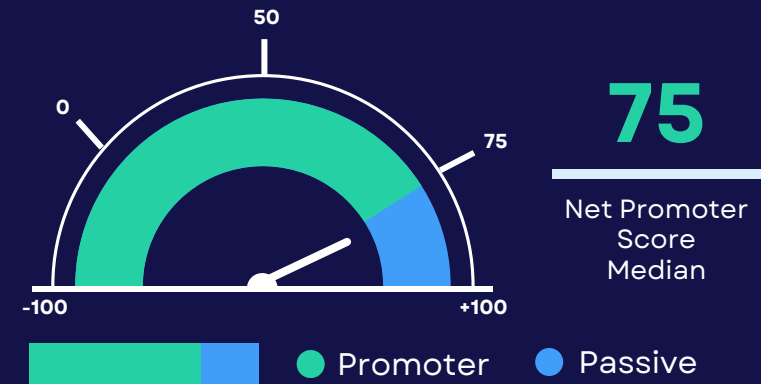
ATTORNEY DATA:

WHAT IS YOUR FIRMS NET PROMOTER SCORE?



**CX** Platform Data

WHAT IS YOUR FIRMS NET PROMOTER SCORE?

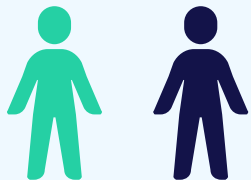


## THE CX OPERATIONS GAP

The client experience operations gap represents the operational drag that's created when law firm staff use systems and tools that create administrative burden and negatively impact client satisfaction levels, simultaneously burning out staff.

## YOUR TEAM'S NOT SLOW — YOUR SYSTEMS ARE.

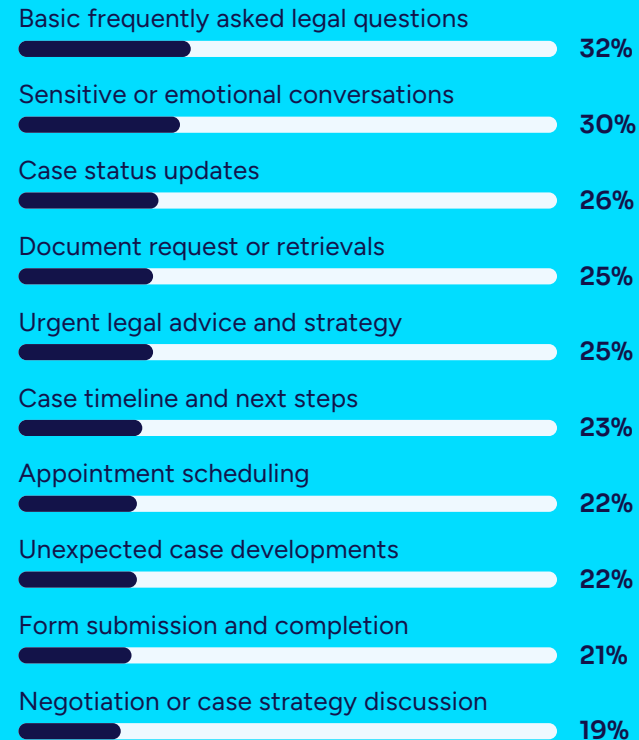
Since most firms don't provide clients with self-service access to information, clients frequently reach out to ask basic legal FAQs and inquire about their case status.



**AS A RESULT, 1 IN 2 ATTORNEYS SAY THEY UPDATE THEIR CLIENTS ON THEIR CASE UPDATES BY PHONE OR EMAIL DAILY.**

### ATTORNEY DATA:

#### WHAT ARE THE MOST COMMON REASONS CLIENTS CONTACT YOU?



### ATTORNEY DATA:

#### HOW OFTEN DO YOU UPDATE CLIENTS ON THEIR CASE STATUS BY PHONE OR EMAIL?





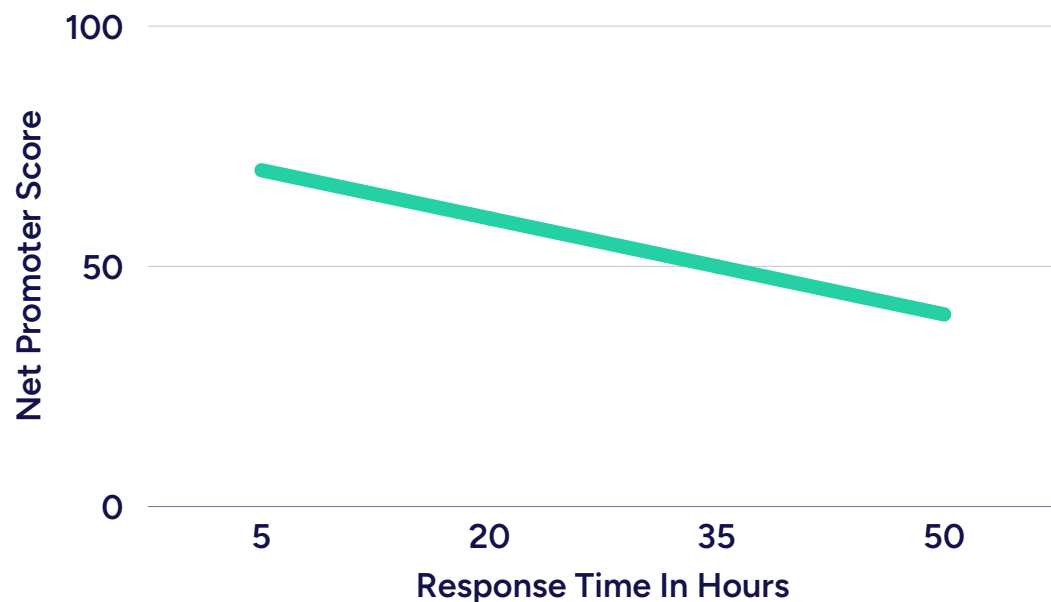
While there are definitely times when a personal touch by phone is necessary — especially when delivering sensitive news or complex updates — much of legal routine case communication could be handled more efficiently with the right technology. However, legal teams get bombarded with calls and emails from clients looking for basic information, then spend significant hours replying and manually documenting these interactions inside the firm's case management system. Behind the scenes, clients sit waiting for answers. Case velocity isn't just about firm efficiency — it directly impacts client satisfaction. The correlation between case resolution speed and client experience is undeniable, as evidenced by the relationship between net promoter score (NPS) and response time.



Legal client engagement platform data shows a direct correlation between response time and NPS; the shorter the response time, the higher the NPS (see graph 1 on next page). The data also shows a direct correlation between time-on-desk (total case time) and NPS; the shorter the time-on-desk, the higher the NPS (see graph 2 on next page).

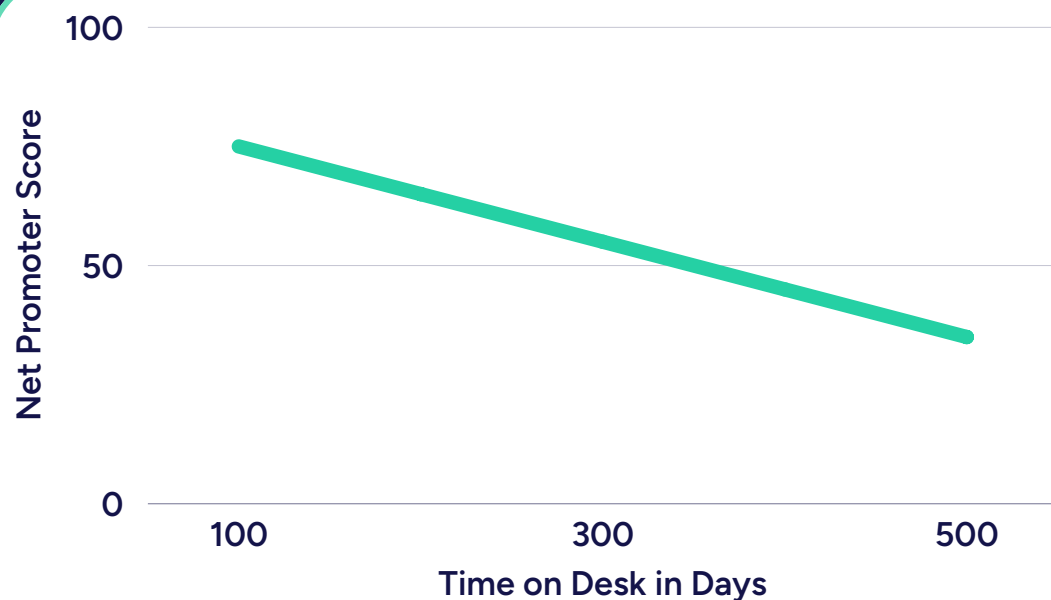
## LAW FIRMS THAT MEASURE RESPONSE TIMES AND TIME-ON-DESK CAN FAVORABLY IMPACT NPS.



Platform  
Data

## Net Promoter vs. Response Time

The shorter the  
response time,  
the higher the NPS

Platform  
Data

## Time on Desk vs. Net Promoter

The shorter the total  
case time, the higher  
the NPS



The most successful law firms recognize that excellence requires understanding exactly how clients feel, communicating in ways clients expect, measuring client engagement, and developing a standardized AI-enabled client experience process. This allows these firms to provide clients with:



**On-demand access  
to case information  
and documents**



**Timely, proactive  
communication to  
minimize waiting  
and uncertainty**



**Feedback collection  
at key touchpoints,  
allowing clients to  
share how they feel**

As a result, these firms are able to create client trust and confidence at scale, which translates into happy clients. What exactly does an “AI-enabled client experience” look like? Next, the report explores how law firms are modernizing their CX with AI technology.

## KEY FINDING #2 EXTENDED

# Modernizing the Client Experience With CX AI

The term **CX AI** refers to AI-powered tools that are specifically designed to enhance the client experience at scale and to help the firm to operate with more client intelligence. Unlike general-purpose AI applications like ChatGPT or Google Gemini, which can be used to enhance various processes and tasks, CX AI is built with the goal of driving high client engagement and is deployed where client engagement work takes place.



**CX AI minimizes client administrative work.**



**CX AI maximizes client satisfaction.**

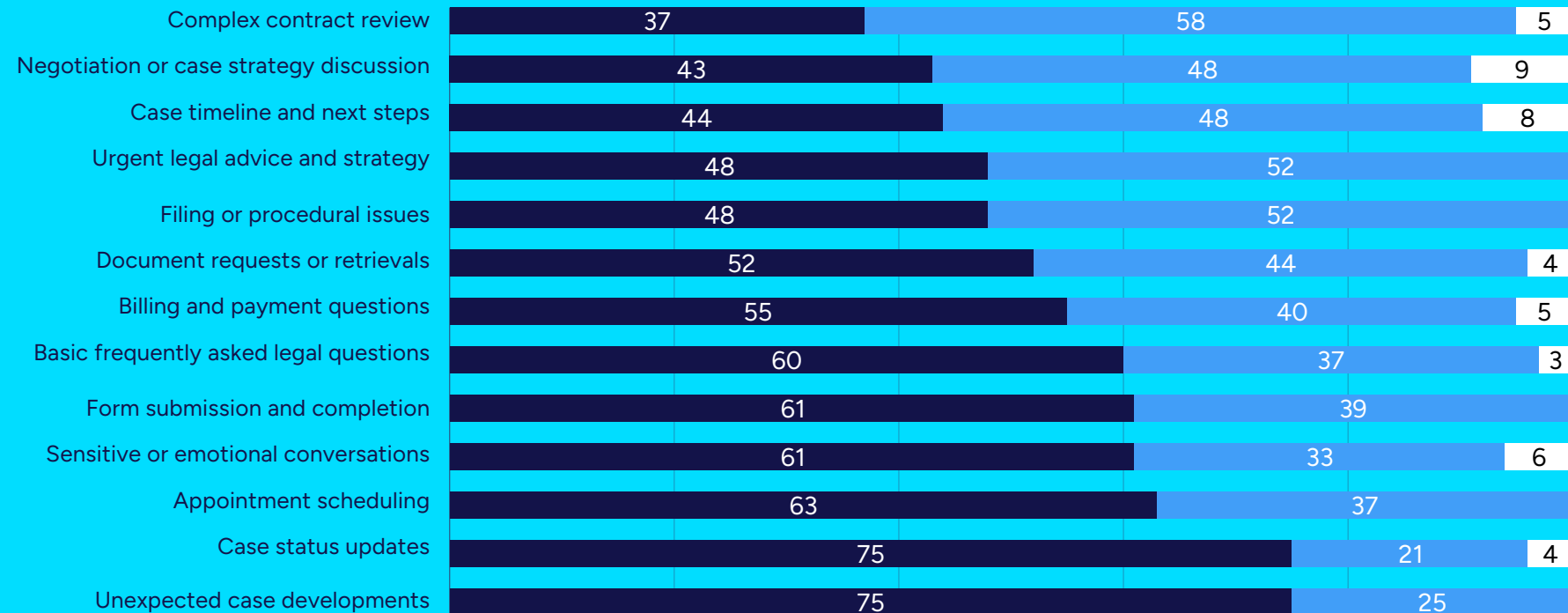
## ARE ATTORNEYS READY FOR AI?

Legal technology has entered a new era where AI is no longer a futuristic concept but a practical tool that's reshaping how attorneys work. The legal industry is already embracing AI across various functions: from e-discovery and case management summarization to document analysis and generating demand letters. This survey confirms that firms have an openness to using AI technology — in fact, they're currently harnessing AI to handle all 13 client interaction categories, from billing inquiries to appointment scheduling.

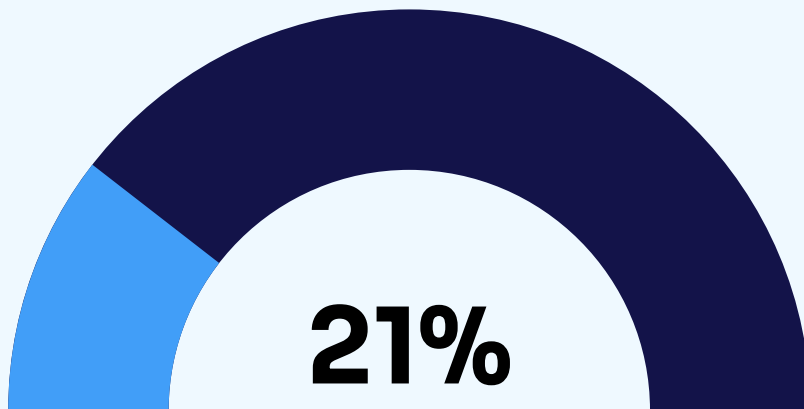
### ATTORNEY DATA:

#### OF THE REASONS YOU SELECTED, WHICH, IF ANY, ARE TECHNOLOGY-ENABLED?

● Technology-enabled — no AI    ● Technology-enabled — with AI    ○ Unsure



However, this adoption remains fragmented and uneven across different use cases. While many firms embrace AI for complex contract review, only 21% use AI-powered tools to provide case status and updates to their clients. This explains why many clients still need to call or email their legal team for case status information. Additionally, many firms implement AI solutions in isolated pockets rather than strategically across the entire client journey. Those that adopt AI merely to "check a box" won't realize the same transformative results as firms that deploy it strategically throughout the end-to-end client experience. CX AI tools that are built especially for law firms have additional benefits.



**ONLY 21% USE AI-POWERED TOOLS TO PROVIDE CASE STATUS AND UPDATES TO THEIR CLIENTS**

## THIS REPORT HAS IDENTIFIED TWO PRIMARY BENEFITS OF CX AI FOR LAW FIRMS:

### #1

**AI CAN MINIMIZE LEGAL ADMINISTRATIVE WORK AND ACTUALLY IMPROVE CLIENT EXPERIENCE.**

### #2

**AI GIVES VISIBILITY INTO METRICS THAT HELP MANAGE RESPONSE TIMES AND CLIENT SENTIMENT.**

## ARE YOU STILL ANSWERING THE SAME QUESTION TWICE?

### CX AI Minimizes Legal Administrative Work.

According to the survey, two of the three most frequent reasons clients contact law firms are for "basic frequently asked legal questions" and "case status updates." ([See page 41](#)) This creates a substantial administrative burden, with staff struggling to find time to reply to an influx of calls and emails — plus log these interactions. The repetitive nature of client inquiries creates an enormous drain on firm resources.



**TWO OF THE THREE MOST FREQUENT  
REASONS CLIENTS CONTACT LAW  
FIRMS ARE FOR "BASIC FREQUENTLY  
ASKED LEGAL QUESTIONS" AND  
"CASE UPDATES."**



Two of the top three reasons clients reach out — FAQs and status updates — could easily be handled asynchronously through a self-service CX AI tool. When it comes to checking on their case status, clients simply open their mobile app to see real-time information. When it comes to giving case status updates to the firm, clients don't need to call or email to say, 'I went to my doctor's appointment.' Instead, they can log that appointment directly into the mobile app, and the update will be automatically sent to the firm's CMS. This frees staff from the repetitive, time-consuming task of answering the same questions over and over again. One phone call can take 5-20 minutes of staff time, and one email can take 5-10 minutes. These minutes add up quickly — and for larger firms, they require more staff and create additional operational costs.

To be clear, firms' administrative burden isn't due to a lack of AI tools to reduce this workload — the problem is that most AI tools aren't available at the point where client engagement actually happens. For instance:



- ▶ Translation tools like [Google Translate](#) exist but aren't integrated into messaging systems. High adoption and regular use isn't feasible given the constant cutting and pasting required.
- ▶ Large language models like ChatGPT can draft responses but require extensive copying and pasting as well as repetitive prompting.
- ▶ Most importantly, these disconnected solutions still require manual documentation in the firm's case management system. As the single-source-of-truth, if the systems do not natively integrate data into the CMS, business outcomes cannot be achieved.

This disjointed approach leads to inefficiency and resource waste. The key to successful AI implementation is deploying it where your team already works. You don't have to look beyond the legal industry to see that legal-specific AI is being deployed at the point where work is done. When AI is built directly into a legal client engagement platform that integrates with the firm's case management system, business impact is substantial.





## Platform Data

Legal client engagement platform data shows that user firms save valuable time — to the tune of 1,329 hours saved per user firm annually (on average).

**WHEN AI IS BUILT  
DIRECTLY INTO A LEGAL  
CLIENT ENGAGEMENT  
PLATFORM THAT  
INTEGRATES WITH THE  
FIRM'S CASE  
MANAGEMENT SYSTEM,  
BUSINESS IMPACT IS  
SUBSTANTIAL.**



## CX AI MAXIMIZES CLIENT SATISFACTION

With AI-powered communications and workflows, you can also anticipate and address client needs. A CX AI platform isn't just reactive — it's proactive, delivering information to clients before they feel the need to reach out. By analyzing case progress, the system can automatically generate status updates, remind clients about upcoming deadlines, and provide relevant educational materials at appropriate stages of their case. And when the CX AI tool integrates with your firm's CMS, actions taken inside the CMS can automatically trigger mobile push notifications to give clients updates like, "Your contract is currently under review by the legal team." Clients stay informed without consuming legal team bandwidth.

Firms that modernize their client experience by adopting CX AI to reduce their dependence on fragmented, legacy communication channels see measurable improvements in both operational metrics and client satisfaction scores.



Legal client engagement platform data shows that firms that use CX AI reply faster than legal industry averages. User firms see an average response time of 5.29 hours, while average response times can take anywhere from a few hours to a few days, according to multiple published studies.

## USER FIRMS SEE AN AVERAGE RESPONSE TIME OF 5.29 HOURS





## KEY FINDING #3 EXTENDED

# Closing the CX Gap

### How happy clients become your best marketers

Happy clients are vital to business growth — they drive referrals, retention, positive online reviews, and thus increased revenue. This report uncovered three key factors that are critical in driving happy clients:



**Providing easy, on-demand access to case information, updates, and documents**



**Delivering effective, timely, proactive communication, including feedback solicitation**



**Instilling trust and confidence that the client hired the right legal team**

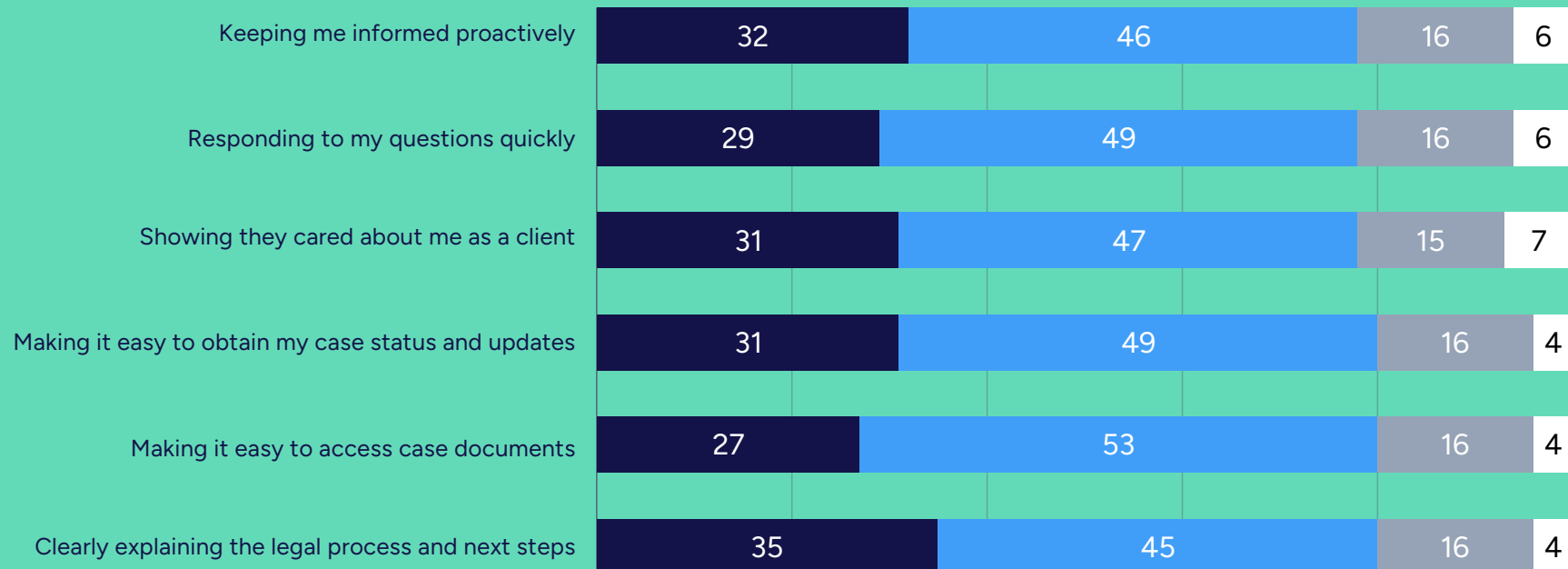
These factors don't just happen. **Firms that achieve impactful results all have one thing in common: they are intentional about creating business processes and systems that support these factors.** Technology adoption, especially CX AI, is at the heart of the equation and is proving to be the fastest way to scale a modern client experience.

**SIMPLY MEETING YOUR CLIENTS' NEEDS BY RESOLVING THE CASE IN THEIR FAVOR ISN'T ENOUGH TO THRIVE IN TODAY'S HIGHLY COMPETITIVE LEGAL MARKET.**

*CLIENT DATA:*

**THINKING ABOUT YOUR CASE, HOW WELL DID YOUR LEGAL TEAM MEET YOUR NEEDS IN EACH OF THE FOLLOWING AREAS?**

☒ Exceeded my needs
 ☒ Met my needs
 ☒ Fell short of my needs
 ☐ Severely failed to meet my needs



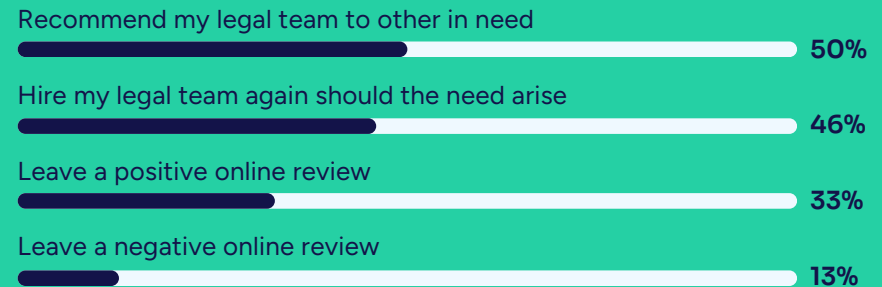
Simply meeting your clients' needs by resolving the case in their favor isn't enough to thrive in today's highly competitive legal market. Especially as large firms continue to acquire smaller firms and leverage their significant resources to dominate local markets, attorneys can grow without the Am Law 50 marketing budgets if they can win the game of exceeding client expectations to build a loyal base of clients who will loudly advocate for the firm.

## EMOTION IS THE FUNDAMENTAL DRIVER THAT DETERMINES WHETHER A CLIENT BECOMES A PROMOTER OR A DETRACTOR.

A client's decision to leave a positive online review is primarily influenced by how the experience made them feel — not just the legal outcome.

### CLIENT DATA:

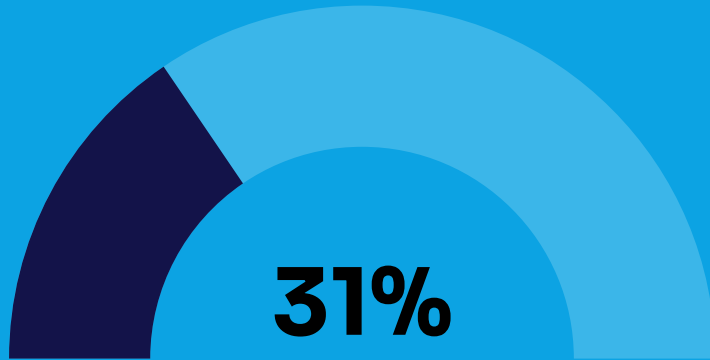
#### DID YOU, OR DO YOU PLAN TO, TAKE ANY OF THE FOLLOWING ACTIONS?



### HIGHLY SUCCESSFUL FIRMS:

1. Measure client engagement levels at key points across the client journey to identify low engagement, which allows them to nip problems in the bud and move clients up the spectrum — turning detractors into passives, and passives into promoters.
2. Mobilize their happy clients to become promoters who actively promote the firm and reduce the impact of potential detractors in the public arena. They turn silent satisfaction into loud advocacy by asking for reviews at the right touchpoints.

With CX AI, clients receive a one-question survey that asks, "How likely are you to recommend our firm to a friend or colleague?" If their answer shows high engagement, the system prompts them to leave an online review. But despite the clear business benefits, only 31% of surveyed attorneys use automation or technology to collect client reviews at their firm. That means the other 69% must remember to ask clients to leave a review — and manually check online review sites to see if they did it. Online reviews are simply too important to be treated so casually.



**ONLY 31% OF SURVEYED ATTORNEYS  
USE AUTOMATION OR TECHNOLOGY TO  
COLLECT CLIENT REVIEWS AT THEIR  
FIRM**

People tend to talk about referrals and reviews as if they're one and the same.

**However, referrals are  
a “one to one”  
interaction while  
online reviews are a  
“one to many”  
interaction, meaning  
one happy client can  
influence multiple  
prospective clients to  
select your firm.**

Therefore, while firms should encourage both referrals and reviews, driving reviews requires intentional mobilization, supported by AI.



## THERE'S A CLEAR CAUSE AND EFFECT BETWEEN PRODUCT DATA AND FIRM GROWTH.

Legal client engagement platform data shows that user firms that use CX AI to systematically create these key positive emotional experiences and collect reviews from their happy clients see dramatic improvements in online reviews.

- ▶ User firms have an average Google rating of **4.5** stars.
- ▶ Additionally, they're able to collect reviews at scale; 72, 872 reviews per year, which works out to 161 Google reviews collected annually per firm.
- ▶ And while just 7% of surveyed attorneys track how many promoters, passives, and detractors they have, 100% of user firms have data that allows them to see which clients are promoters, passives, and detractors.
- ▶ On average, user firms' clientele comprises 77.3% promoters, 10.2% passives, and 12.6% detractors.

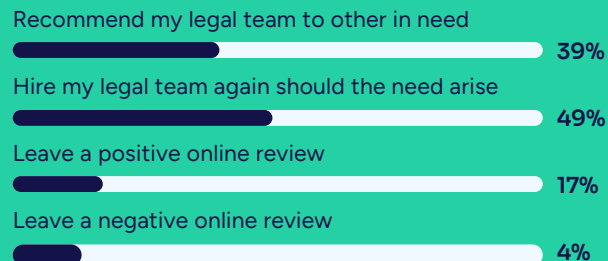
## YOUR REPUTATION RESTS ON CLIENT EXPERIENCE.



## CLIENT DATA BY GENERATION:

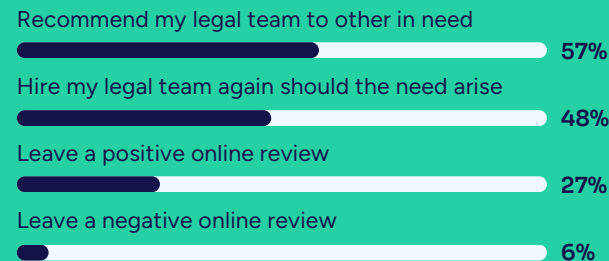
### BOOMERS:

#### DID YOU, OR DO YOU PLAN TO, TAKE ANY OF THE FOLLOWING ACTIONS?



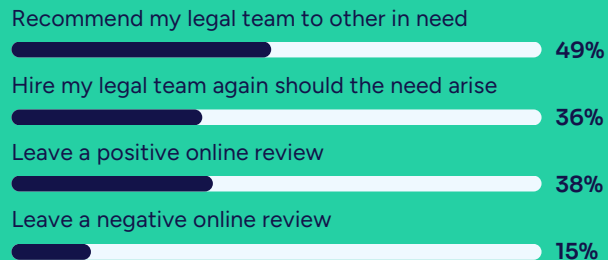
### GEN X:

#### DID YOU, OR DO YOU PLAN TO, TAKE ANY OF THE FOLLOWING ACTIONS?



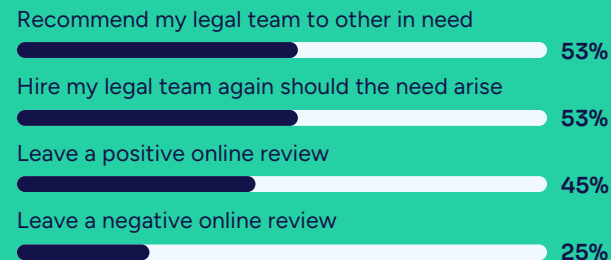
### MILLENNIAL:

#### DID YOU, OR DO YOU PLAN TO, TAKE ANY OF THE FOLLOWING ACTIONS?



### GEN Z:

#### DID YOU, OR DO YOU PLAN TO, TAKE ANY OF THE FOLLOWING ACTIONS?



By now, you have read ample evidence that supports the critical role of client experience in driving desired business outcomes. As stated earlier in the report, millennials and Gen Z clients will soon become the primary consumers of legal services — younger clients are far more likely to leave online reviews. In fact, the client survey revealed that

**GEN Z CLIENTS ARE 145% MORE LIKELY THAN BOOMER CLIENTS TO LEAVE A NEGATIVE ONLINE REVIEW.**

Everything you are reading about is based on data pulled from today's clients — but this story does not stop here, and client expectations are only going to continue to evolve in a highly technical direction as time goes on. Firms that put off CX modernization for “another day” may find themselves dealing with negative reviews as more and more digital natives become consumers of legal services. **Now is the time to future proof your firm.**

It's also important to mention that our survey found no correlation between the use of self-service technology and higher client satisfaction. Yes, self-service tools align with modern consumer expectations, and yes, people enjoy using highly-rated mobile apps. But a tool isn't inherently excellent just because it's classified as “self-service” or “mobile app.” That would be like saying all cars are great just because they are cars. Just as all cars aren't fast or reliable, not all self-service tools exceed the needs of today's consumers. Browser portals (where people have to visit a URL to access information) and poorly rated apps fall short of what modern clients expect.

If you're thinking of investing in self-service technology, do your research, read reviews, and make sure you're investing in the *right* tool.



**IF YOU'RE THINKING OF  
INVESTING IN SELF-  
SERVICE TECHNOLOGY,  
DO YOUR RESEARCH,  
READ REVIEWS, AND  
MAKE SURE YOU'RE  
INVESTING IN THE  
RIGHT TOOL.**

# THE MODERN LEGAL CX PLAYBOOK

These target benchmarks come from anonymized client engagement activity, messaging, and usage data from the Case Status legal client engagement platform — the world's largest database of legal CX data.

## COMMUNICATE

- 1 Implement a CX AI platform:** Choose a highly-rated self-service mobile app that integrates with your case management system to automate routine communications.
- 2 Proactively update clients:** Don't wait for clients to ask for status updates.
- 3 Automate case status notifications:** Use technology to automatically alert clients via push notifications when certain case events occur.
- 4 Provide on-demand access:** Give clients 24/7 access to their case information and documents through a mobile app that meets their expectations.
- 5 Create positive emotions in clients:** Focus on creating the three key emotions that drive positive online reviews and referrals: reassurance, relief, and confidence.

## MEASURE

- 6 Track your NPS score:** Measure client satisfaction with a simple Net Promoter Score survey at key points throughout the case lifecycle. Target benchmark: NPS of 65-75
- 7 Track response time:** Gain visibility by measuring response time and work to decrease it. Target benchmark: reply rate of 5.29 hours
- 8 Track case velocity:** Measure case resolution time and work to decrease it. (There is no target benchmark since time on desk varies based on practice area.)
- 9 Segment clients by promoters, passives, and detractors:** Know likelihood to recommend. Target benchmark: 77% promoters, 10% passives, 12% detractors
- 10 Track your Google rating:** Review it monthly. Target benchmark: 4.5 stars

## MOBILIZE

- 11 Systematically collect reviews:** Use AI to automatically request reviews from satisfied clients at key trigger points in their client journey.
- 12 Identify detractors early:** Quickly identify and address client dissatisfaction before it escalates.
- 13 Implement immediate intervention for passives/detractors:** When clients give neutral or negative NPS scores, have a standard protocol for personal outreach.
- 14 Build Gen Z-ready experiences:** Audit your client experience through the lens of digital natives. Target benchmark: Mobile-first, on-demand access, modern interface.





# Methodology & Respondent Profiles

# Survey Methodology

## DATA COLLECTION:

We took a three-pronged approach to data collection:

- ▶ Independent survey of 433 law firm clients; we refer to this audience as “clients.”
- ▶ Independent survey of 109 practicing attorneys; we refer to this audience as “attorneys.”
- ▶ Anonymized client engagement activity, messaging, and usage data from the Case Status legal client engagement platform; we refer to this audience as “user firms.” (Hundreds of law firms and hundreds of thousands of clients who use the Case Status platform)

All survey data was collected in March and April 2025. The Case Status data leveraged in this report was from calendar year 2024.

## DATA VALIDATION:

To ensure reliable and useful survey data, we applied several filters including:

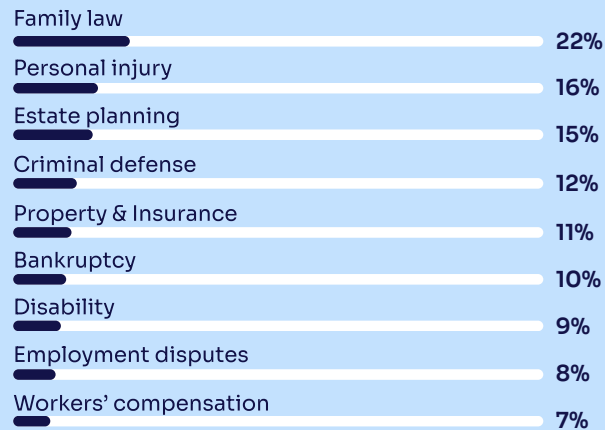
- ▶ Demographic filter: We excluded all responses from those who didn’t meet our survey’s target criteria (e.g., clients who hired a lawyer more than five years ago; attorneys who practice corporate law)
- ▶ Data quality checks: We excluded all responses from those whose response patterns were invalid (e.g., those who completed the survey far too quickly compared to others; those whose answers were outliers, or vastly different compared to others)

Our filtering process left us with a final dataset of 433 clients from the United States who hired an attorney within the past year and 109 attorneys who practice in the United States and work directly with clients.

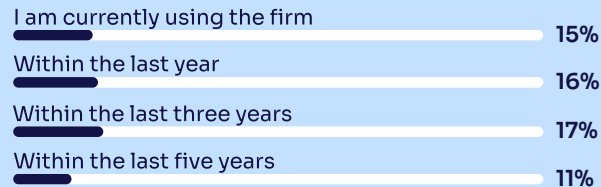
# Respondent Profiles

## Survey Respondents – Clients

### LEGAL USE:



### How long did you use that law firm?



Base: 1,025 (All respondents)  
Only qualified survey respondents were taken for the data in this report.

### DEMOGRAPHICS:

- ▶ Country: United States (100%)
- ▶ State: California (11%), Texas (8%), Florida (7%), New York (6%), Ohio (4%)
- ▶ Census Area: South (38%), West (23%), Midwest (21%), Northeast (18%)
- ▶ Marital status: Married (51%), Single (26%), Divorced (11%), Widowed (6%), Living with partner (5%), Engaged (1%)
- ▶ Gender: Man (50%), Woman (50%)
- ▶ Generation: Silent Generation (2%), Baby Boomers (28%), Generation X (25%), Millennials (28%), Generation Z (17%)
- ▶ Education level: Some high school (10%), Regular high school diploma (28%), Some college (29%), Bachelor's degree (21%), Master's degree (8%), Doctorate degree (4%)
- ▶ Household income: Under \$25,000 (18%), \$25,000–\$49,999 (17%), \$50,000–\$74,999 (21%), \$75,000–\$99,999 (8%), \$100,000–\$149,999 (20%), \$150,000–\$199,999 (9%), \$200,000+ (7%)

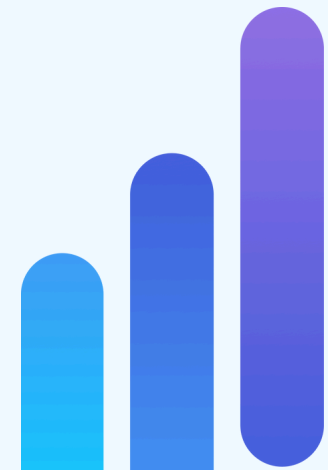
# Survey Respondents – Attorneys

## DEMOGRAPHICS:

- ▶ State: Texas (17%), New York (12%), Florida (9%), California (9%), Pennsylvania (2%)
- ▶ Census Area: South (48%), Midwest (19%), Northeast (19%), West (14%)
- ▶ Gender: Man (79%), Woman (21%)
- ▶ Age: 18–34 (24%), 35–44 (62%), 45–54 (13%), 55–64 (1%)
- ▶ Generation: Baby Boomers (1%), Generation X (13%), Millennials (84%), Generation Z (2%)

## FIRMOGRAPHICS:

- ▶ Industry: Legal (100%)
- ▶ Job title: Associate attorney (19%), Senior associate (33%), Partner (13%), Managing partner (22%), Other attorney (13%)
- ▶ Specializations: Personal injury (15%), Malpractice (6%), Disability (22%), Workers compensation (28%), Mass tort (15%), Immigration (30%), Estate planning (5%), Employment disputes (11%), Criminal defense (9%), Bankruptcy (6%), Family law (12%), Probate law (12%), Property and insurance (3%)



# Case Status Platform Users

- ▶ Practicing attorneys
- ▶ Law firm clients

## REPORTING

Aggregate data has been generalized where necessary to avoid instances where individual firm data could be identified.

Additionally, raw data sets will never be shared externally. Case Status is effectively a tally counter for interactions. Similarly, as users interact with the Case Status platform they trigger usage signals we can count and aggregate into data sets. We can identify trends without collecting information that reveals anything specific about individual customers.

## DATA USAGE AND PRIVACY

The security and privacy of customer data is our top priority at Case Status. In preparing the Legal CX Report, Case Status data operations team observed the highest standard of data collection and reporting.

## DATA COLLECTION

All data insights were obtained in strict accordance with Case Status Terms of Service.

- All extracted data was aggregated and anonymized.
- No personally identifiable information was used.
- No data belonging to any law firm's clients was used.

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