

**ENGAGE, MEASURE, ACT:**

# Your Guide To Driving A Stronger Law Firm

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I have had the pleasure of working in the legal technology space now for several years and am passionate about what we do at Case Status. I know there are lots of parallels between female leaders in technology and those in law. I spent many years helping non-profits leverage technology to further their missions and have always had an altruistic angle to where I look to make an impact. Every female trial attorney I meet has a similar spirit: the desire to help people realize justice. But access to justice for everyday people is a real challenge - and so is running a modern and scalable law firm.

That is why I am so passionate about what we are doing at Case Status and I want to share a few tips you can use today.



**Tip #1:**  
**Engage on their terms**



**Tip #2:**  
**Measure satisfaction**



**Tip #3:**  
**Act on the feedback**

## Working with over 400 law firms to improve client experience.

We have become experts in how happy clients drive successful law firms and I want to share some of that blueprint. Given that we want to make an impact for every consumer facing law firm out there, and that we have first party insights about what makes this happen, I have compiled this guide of helpful hints to start making an impact today. Leverage this guide of what you can be doing today to see improvements in your law firm practice!

TIP #1:

# Engage on their terms

Don't just be transactional – engage your clients. It will pay off.



## Law Firm Current Status: not so great

- ✓ Consumers have changed how they engage with service providers – this change is accelerating in a very technical direction.
- ✓ Consumers spend 5 hours a day on the mobile device, 93% of that time in highly rated app experiences.
- ✓ Consumers expect to have 24x7 access to information and updates in their service – where they are, where they are going and other related and important information along the way.
- ✓ Communications are typically intertwined and indecipherable from where they are sourcing info.
- ✓ In a best case when expectations are unmet, consumers press for information – they will inundate you to get answers.
- ✓ In the worst case when expectations are unmet, consumers will terminate service with you.
- ✓ Consumers project these expectations onto all service providers including and especially legal service providers – many of whom are ill prepared to meet these expectations.
- ✓ Law firms depend upon legacy, and fragmented communication channels like phone and email to interact with clients.
- ✓ Email as a communication method sees 21% open rates on average, meaning there's a lot of room for missed and unanswered emails. –Link
- ✓ These disparate communications systems seldom integrate with the case management system at the law firm.
- ✓ Law firms lean on communication roles (case managers, admins, paralegals) to react and take the heavy, manual burden to respond to all the inbound requests – most just asking for updates.



# case status



TIP #1:

## Engage on their terms

**Don't just be transactional – engage your clients. It will pay off.**

- ✓ It is not uncommon for firms to take 48 hours or more to respond to clients, when half of all customers expect companies to respond faster than 4 hours.
- ✓ All this communication strain takes a toll on other priorities and impacts the growth of the firm.

### What you can do at your law firm to get better today.

- ✓ Meet your clients where they are at – ask and document their preferred channel for communications. Make this info available to each staff member.
- ✓ Establish Service Level Agreement (SLAs) for response time for internal staff to target.
- ✓ As your team meets and exceeds SLAs, publish this on your website and marketing materials to showcase how you stand out from other competitor firms. Map out the ideal client journey for a given practice area or case matter and share this as part of your consult with new clients. Giving them an overview and set expectations will provide a better overall experience.
- ✓ Proactively serve up these details – educate and empower your client with proactive information about (1) the status of their case and (2) where they are going – what to expect next.

TIP #2:

# Measure satisfaction

You cannot manage what you don't measure. Start measuring today!



## Law Firm Current Status: not so great

- ✓ Perception is reality. Perception is emotional and psychological but can be estimated empirically
- ✓ Consumer based service providers have systematically and rigorously turned to measuring client satisfaction.
- ✓ The standard of measure is one simple question: on a scale of 0-10 how likely are you to recommend us to your friends and family?
- ✓ This system of measure not only allows for 1:1 measurement of satisfaction but using the NPS methodology, the service provider firm can aggregate an overall company health on a -100 to +100 scale.
- ✓ The legal industry has an average NPS score over the last 5 years toggling between 20-40. This is considered fair and aligns with the airline industry for comparison.
- ✓ 50 is considered really good, 60 excellent, and 70+ world class. To compare, Amazon has an NPS score of 73 in 2023.
- ✓ Half of consumer based law firms never ask about client satisfaction outside of sensing mood in a given conversation. The other half that do ask, typically ask at or near the end, leaving little time to influence a change in perception.
- ✓ Law firms don't believe that it is good to ask in early stages because the client hasn't had enough time to form an opinion even though the client has been through the buying process, the intake process and the onboarding process. These experiences should be subject to measurement just as much as case stages.

TIP #2:

# Measure satisfaction

You cannot manage what you don't measure. Start measuring today!



## What you can do at your law firm to get better today.

- ✓ When mapping out the ideal client journey to help drive engagement, identify the major milestones to ask the satisfaction question.
- ✓ Use the clients preferred channel to ask the question. Most often this will be via text message; this channel yields the highest response rates. - use a 3rd party survey tool like typeform
- ✓ The score is the most important part, but give them a place to give qualitative feedback too. Most commonly, this is a comment box that leaves room for open-ended feedback.
- ✓ Create a centralized place to log these replies
- ✓ Ask up front and ask often. Best practices dictate not to ask more than 1x per month.
- ✓ Train staff on how to ask this question during live communications and where to log the answer
- ✓ Designate someone at the firm to track the overall NPS score for the overall health
- ✓ Slice up the data at regular intervals, at least once a year, to see the NPS of different staff members and the overall average rating - tie some of next year's incentives to driving a higher score at the individual level
- ✓ Once you establish a baseline, establish a company goal for the next annual period with activities that will help drive this up.

TIP #3:

# Act on the feedback

When you know where people stand, you can teach your staff to execute accordingly.



## Law Firm Current Status – not so great

- ✓ Law firms can spend as much as 67% of gross revenues on marketing efforts.
- ✓ Research shows that the buying decision is dominated not by ad spend but by online research (reviews) and direct referrals.
- ✓ Detractors are 9-16x more likely to leave you a bad review publicly, taking their dissatisfaction to the outside.
- ✓ Many firms try to bury bad reviews not by addressing the concerns but by getting more highly rated reviews to bring up the score.
- ✓ Happy/Promoter clients are 8x more likely to give you an online review or referral, but only if you ask.
- ✓ A client with a gmail email address has a much easier time leaving you a review.
- ✓ Key words matter in your online reviews and help with search results.
- ✓ A detractor that is converted into a promoter is a much stronger defender of the brand.

## What you can do at your law firm to get better today.

### Prioritize the low score

- ✓ If you get a low score, engage with the client ASAP to rebuild trust. Time is important here, reaching out within a few hours after receiving a negative response is crucial for turning around that experience in the eyes of the client.

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## What you can do at your law firm to get better today.

### Prioritize the low score

- ✓ Not all channels are created equal – choose a live channel like phone, video or in person meeting. Email and text are not ideal channels for rebuilding trust.
- ✓ Never waste a crisis – if you do get a bad review before you can intercept, always lean-in and engage. Other potential clients are looking at these reviews to see if you owned it with empathy and offered to help.

### Ask your high scores for a review or referral

- ✓ Prioritize your gmail emails since they will have easy access to Google Business Profile.
- ✓ Provide them a direct link to the business site so all they have to do is one click to leave a review on the proper online listing.
- ✓ Use their qualitative feedback to help them articulate what they told you on the Google review – different searchable terms matter.
- ✓ It's never too early to ask – don't wait until the case is closed.
- ✓ You can also ask even after the case is closed. Promoters who have closed cases should still have relationship messages from your firm to keep in touch and solicit referrals (or repeat business).



# Case Status in a mission to radically change how law firms engage with their clients.

As the #1 legal client engagement solution, as voted by firms and their clients, we make client engagement simple. Our software platform enables law firms to deliver a modern, scalable 5-star experience for their clients while also helping law firm staff become more productive.

We empower clients, making access to justice more attainable. We solve real business problems for law firms, helping your firms to grow stronger.

**30%**

Decrease in Phone Calls Within Weeks

**90%**

Reduction in Emails From Clients

**130%**

Net Promoter Score Increase Average

**800%**

Increase in 5-Star Google Reviews