

XIRA Law

Legal Tech Can Help With Client Acquisition



where are consumers looking for legal advice?

When consumers are looking for legal advice, 96% of the time they start online. A similar trend occurred when consumers headed online to Angie's List/Thumbtack to look for Pros to help with home services. This is why legal entrepreneurs that want to land new cases need to have a digital presence. But, running a small or boutique law firm means balancing time spent on creating that online presence while working with an almost non-existent marketing budget vs balancing administrative tasks, all while practicing law.

It is widely-known that focusing on generating more billable hours with existing clients is much more lucrative than spending time, money, and effort on acquiring new clients. Eventually, every firm must tap the brakes, downshift, and re-examine how to bring new clientele to replenish the firm's revenue funnel.

Even before the pandemic, solo-small legal entrepreneurs have found it a challenge to acquire new clients while also competing with substantial marketing/advertising budgets of larger firms. Qualified leads have become more and more difficult to procure, time spent on non-billable activities has increased, and the way consumers look for attorneys has changed dramatically. Today's consumers expect to find, interact, and engage with attorneys the same way they do with their friends and family, or other online professional services providers.

These changes have led to the emergence of legal tech solutions that are helping connect attorneys and prospect clients. But, identifying a cost-effective platform that brings everything together to make it easier for legal entrepreneurs to obtain reliable case leads while also integrating into their practice management system is harder to come by.

top moderate and significant challenges solo-small firms face

1. Acquiring new client business (78%)

2. Spending too much time on administrative tasks (69%)
3. Increasing complexity of technology (63%)
4. Clients demanding more for less, or rate pressure from clients (62%)

extracted from survey of small-solo law firm management conducted by Thomson Reuters Solo and Small Law Firm group

CUSTOMER ACQUISITION



In a survey conducted by Thomson Reuter, **acquiring new business is solo-small firms' number one challenge**. But, barely more than a third have implemented changes to address this challenge and two-fifths of these firms do not even have a plan for how to address it. For those savvy legal entrepreneurs looking to address client acquisition challenges, legal tech may unexpectedly provide just the right functionality to tackle this burdensome business obligation.

What functionality should be considered when looking for a legal tech solution that aims at improving client acquisition?

When evaluating different legal tech to acquire new clients, solo-small legal entrepreneurs should keep these four process steps in mind:

1. attracting consumers
2. converting consumers to clients
3. managing and retaining clients
4. integration into existing practice operations

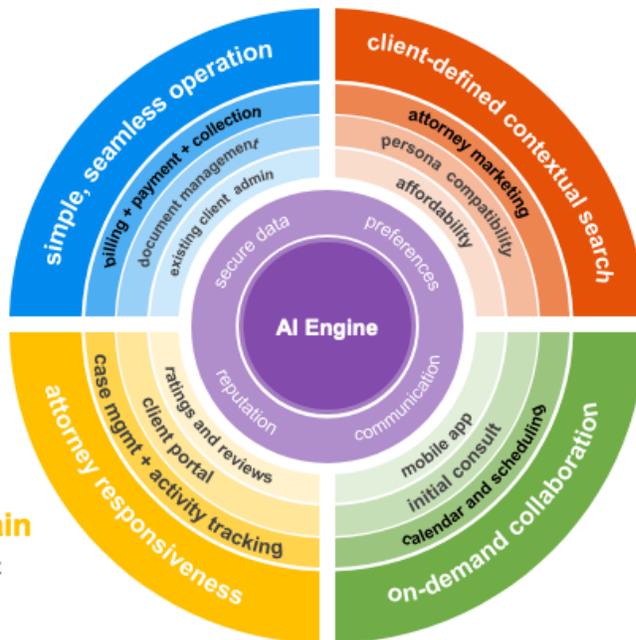
Attract

This step helps identify functionality that enables motivated consumers to find attorneys based on their individual preferences via a client-defined contextual search capability. In addition, technology must allow consumers to discover attorneys via the methods they prefer. With 64% of consumers driving less these days, they value services that close the physical gap - like meeting online from the comfort of wherever they are. In fact, fifty percent of consumers are no longer willing to travel more than 28 miles, or go into a law office to meet an attorney. Technology that attracts new consumers should include the following:

- **attorney marketing:** a legal, digital, directory containing an attorney's key profile data (such as a photo, bio, practice area, experience, introductory video, education/degrees, spoken languages, and ratings/reviews). Having a tool that provides this capability allows attorneys to brand and market themselves to potential clients without requiring any advertising budget or staff to manage a campaign. However, attorneys need to make sure they are not forced to buy space/ads or pay ongoing fees just so they can even get found on the internet!
- **persona compatibility:** a way for consumers to use attorney marketing data as well as other search filters (such as how quickly they need help, availability of free initial consults, attorney ratings, etc.) to review and compare attorneys' profiles and select the right attorney for them.
- **affordability:** a way for attorneys to publish standard hourly rates, fee types (contingency, flat fee), and initial consult fees. This creates transparency and agreement to rates ahead of time since 60% of consumers want to know pricing even before contacting an attorney. Attorneys can also research competitive rates for their market.

Integrate

Centralized, end-to-end practice management



Attract

Motivated consumers find attorneys

Convert

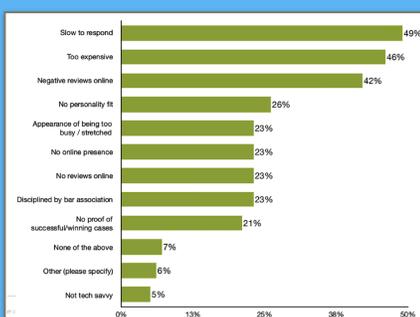
Real-time collaboration between attorney and consumer

Manage and Retain

Transparency, trust, client loyalty

top 5 reasons why attorneys don't get hired

- slow to respond (49%)
- too expensive (46%)
- negative reviews online (42%)
- no personality fit (26%)
- appearance of being too busy (23%)



extracted from survey conducted by Martindale-Avvo

Convert

This step helps identify functionality that enables on-demand collaboration between an attorney and consumer. To convert a potential consumer to a new client, an attorney needs to be able to respond quickly to the consumer's initial legal inquiry. In fact, 64% of consumers expect a response from an attorney within 24 hours and 85% of consumers that are able to expediently connect with an attorney they've selected end up hiring them. Technology that converts consumers to new clients in real-time should include the following:

- **online calendar and scheduling:** ability for attorney to have an online calendar that enables consumers looking for legal assistance to book an attorney's available time. Did you know that 39% of consumers state that they are more likely to retain an attorney if they can schedule a meeting with that attorney in less than four hours? Having an online calendar also allows existing clients to book appointments with their attorney and eliminates the need to go back and forth in order to figure out when both are available to meet. Allowing everyone to collaborate using one, integrated calendar is a time saver and is functionality to be sought after for any attorney researching client acquisition solutions.
- **initial consult video conference:** ability for attorneys to meet online via a secure, video conference platform to discuss consumer's legal issue and make decisions regarding next steps.
- **mobile app:** provides collaboration functionality via an app that can be accessed on any mobile device. Attorney should be able to use their mobile app to manage their practice, automate admin tasks, meet with new and existing clients, and access/update their calendar wherever they are.



what legal consumers want when seeking an attorney

- recommendations: 40%
- reputation: 29%
- sense of trust: 29%
- apparent honesty: 24%
- sense of empathy: 22%

extracted from FindLaw legal consumer infographic

Manage and Retain

This step helps identify functionality that improves and facilitates attorney responsiveness and transparency. In fact, 48% of legal clients indicate that responsiveness of the attorney is very important to them throughout their legal journey. Proactive engagement not only helps manage clients' experiences and opinions, but also improves the attorney/client working relationship. The challenge, however, is finding time to make frequent and relevant contact that is essential in building clients' trust and loyalty. Technology that helps automate the management and retention of their clients should include the following:

- **case management and activity tracking:** provides functionality to capture case details and notes for each client (including fee structure and invoicing intervals) and enable attorneys to document time and expense entries for specific work completed for clients' cases. Instead of waiting until the end of the week or month, attorneys have the ability to easily track their work product as they complete an activity - either at the office or on their mobile phone when they are on the go.

How an attorney bills is as important as what they bill. Clients don't like surprises. The ability to provide periodic billing as activities accrue (micro bill) not only reduces the administrative burden for the attorney, but increases time to revenue for their firm. In addition, clients feel their legal issue is being attended to when they see evidence that their attorney is working their case. They are also more likely to be able to make partial payments with periodic invoicing rather than being hit with one large bill at the end of the month.

- **client portal:** ability for client to be able to go online to view/pay invoices, add/view/download case documents, schedule meetings, and message/communicate regularly with their attorney. Legal competence is always expected, and clients are more demanding than ever of value and transparency for each interaction they have with an attorney (from communications, meetings, access key legal documents, and billing). Thus, having an online portal available for clients to regularly check the status of their case (whenever they want or wherever they are) is important to managing and retaining a happy client.
- **ratings and reviews:** ability for legal tech solution to capture user ratings (e.g. 5-star scale) and written reviews throughout each client's legal journey. In today's social world, more than 40% of legal consumers read online reviews and recommendations when searching, comparing, and finally selecting attorneys. It is important, therefore, that attorneys continue to build client loyalty and develop an empathetic, honest, transparent, and trustworthy reputation from initial consultation through completion of the case. Obtaining more positive reviews and standing out amongst other attorneys certainly helps any firm with acquiring new clients. Of course, attorneys can never have too many recent, strong client reviews!

Integrate

This step helps identify additional capabilities needed for a seamless, secure integration into solo-small firms' existing operations. Technology considerations required for a comprehensive integration should include the following:

- **billing, payment, collection:** ability to offer invoicing, payment, and banking capabilities as part of a centralized, end-to-end practice management solution.
- **document management:** ability for attorneys to keep client case documents and attorney records in one, secure place. Clients should also be able to upload and view documents with proactive notifications informing both attorneys and clients whenever new documents are uploaded.
- **existing client admin:** ability to manage existing clients at no additional cost. Attorneys should demand that any legal tech platform they select not only enables management of newly acquired clients, but also allows migration of existing clients to the integrated platform without incurring additional expenses.

Legal tech can help with client acquisition. Having the ability to encompass client acquisition capabilities into a solo-small firms' practice management software helps streamline and simplify their operations and advances the way legal entrepreneurs are already used to operating. A comprehensive, cost-effective platform that brings everything together makes it easier for legal entrepreneurs to attract, convert, manage, and retain clients in today's competitive marketplace.

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