

11 tools to optimize your business

Tool #5: Secure Messaging



advantages of XIRA's secure messaging

1. enables faster, more effective communication with your client
2. improves client/attorney relationship when you provide quick responses to client queries
3. makes it easier for clients to engage with you and more likely to respond to your requests
4. provides an easy way to send reminders for upcoming meetings, court appearances, and invoices that are due

Your clients prefer messaging over email. Communicating via messaging is now just part of everyone's daily life. In fact, 78% of clients say messaging is the fastest way to reach them for important updates on case matters and 89% of clients would prefer to interact with their attorney via messaging rather than a phone call. When used under the right circumstances, attorneys that message with their clients enable instantaneous collaboration which creates a better client experience.

XIRA's secure messaging

XIRA's GAVEL platform contains a complementary, integrated, messaging capability that enables attorneys to communicate with clients in real time using a highly secure and private messaging platform. On-the-go legal professionals enjoy instant access to a secure, reliable, communication tool resulting in increased productivity and better outcomes.

Our messaging functionality provides solo-small law practitioners with:

- a flexible, intuitive, scalable, messaging solution that saves and archives all messages in context of a specific attorney with a specific client
- ability to send and access messages anytime, from anywhere (including our mobile app)
- capability to receive notifications when unread messages are delivered to stay current on the status of information that is being shared
- a transparent history of messaging correspondence.

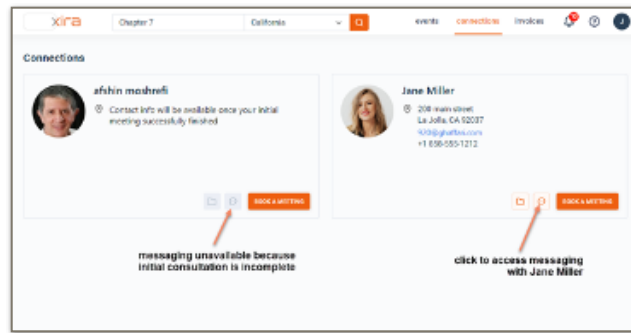
secure messaging

ABA Rule 1.4 (a) requires an attorney to keep their clients informed on the status of their matter and promptly comply with reasonable requests for information. While not suited for all legal issues, messaging is a fast and easy way to keep your clients well-informed and ensures you're maintaining regular communication with them.

Providing a great client experience, requires that you put the needs and expectations of your clients first - including alignment on how best to communicate with each other. With messaging being the preferred form of collaboration these days, XIRA's messaging capability enables you to continue to be more responsive to your clients.

access to secure messaging

You and any new clients you meet with on XIRA will only have access to the messaging capability once you've had your first initial consultation with them. The messaging icon will be grayed out for both you and your client prior to the initial consultation being completed. The only exception is when you invite an existing client to connect with you on XIRA. The invited client can immediately message with you upon completing their XIRA registration.



client connections view

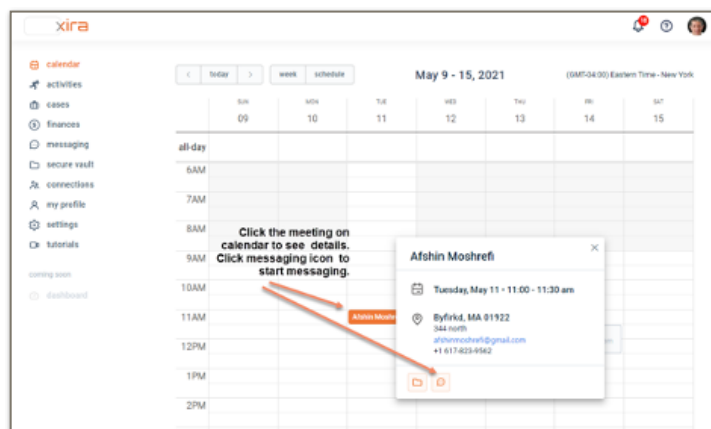
how it works (attorneys)

We've made it easy for you to quickly identify the clients you need to message by providing access to our secure messaging capability on XIRA's browser (or mobile app) from multiple areas:

- calendar view
- cases
- messaging
- connections

calendar view

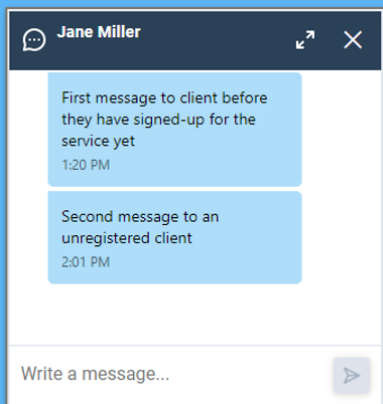
1. log in and select "calendar" tab (calendar icon). Select a specific client meeting in your calendar to see the meeting details.
2. select the orange messaging icon.
3. write your message and press enter.



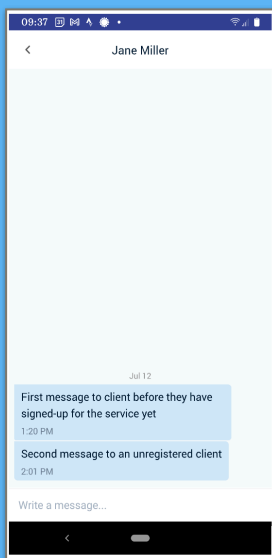
attorney calendar view

message history

XIRA messaging capability is different from traditional messaging systems in that, messages are kept in context of a specific attorney and specific client. Messages between an attorney and client are permanently saved with the ability for either party to scroll up to see a history of previous conversations.



history view (desktop)



history view (mobile)

cases

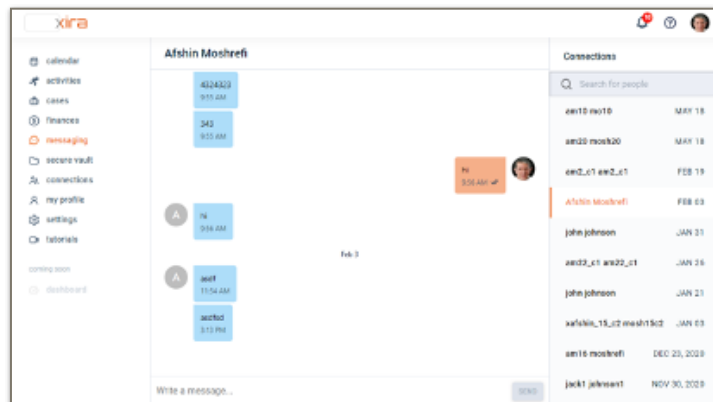
1. log in and select "cases" tab (briefcase icon). Select a specific client's case.
2. select the orange messaging icon to the left of the three ellipses.
3. a window appears in the lower right-hand corner. Write your message and hit enter.



attorney cases view

messaging

1. log in and select "messaging" tab (bubble icon).
2. click on a client from your "Connections" list.
3. a screen pops up displaying all previous messages (if applicable). At the bottom of the screen, there is a field to write and send your message.



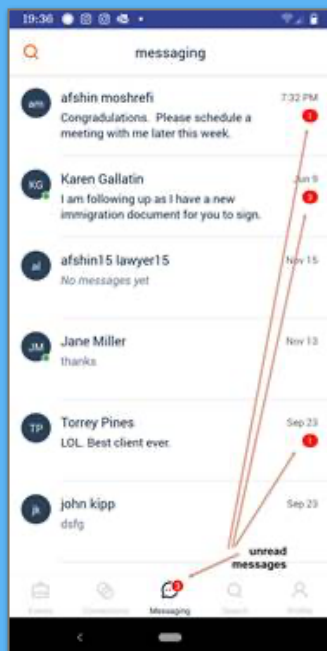
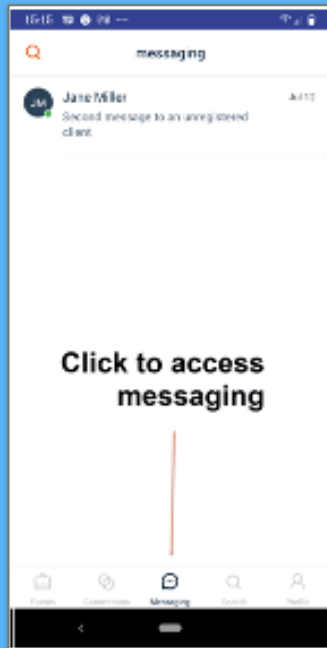
attorney messaging view

connections

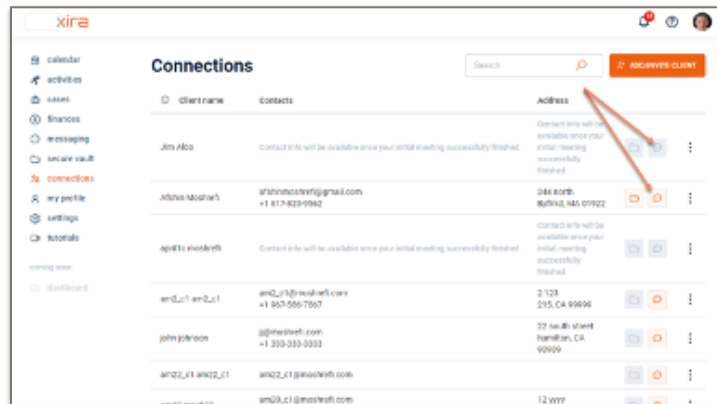
1. log in and select "connections" tab (icon of two people).
2. select a client name from your "Connections" list.
3. select the orange messaging icon to the left of the three ellipses.
4. a window appears in the lower right-hand corner. Write your message and hit enter.

mobile views

Messaging functionality is also available on XIRA's mobile app.



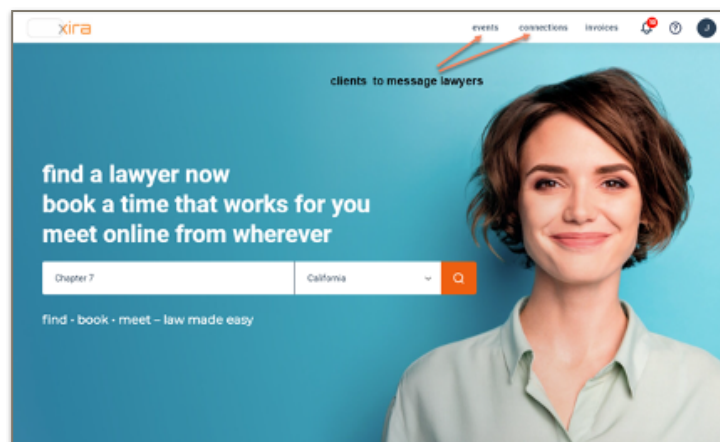
unread message notification view



attorney connections view

how it works (clients)

After the initial consultation has been completed, clients can message their attorney by clicking on either the "events" or "connections" tabs.



client login view

events

The client "events" screen shows all pending attorney meetings (completed or cancelled meetings are purged from the "events" screen). Clients select a specific meeting on their "events" screen in order to see the meeting details. They can then click the messaging icon to communicate with the attorney. Clients can only message attorneys they've had at least one initial consultation with. The messaging icon will turn orange once a client has completed an initial consultation, or if they have been invited to the XIRA platform by their existing attorney. See the "[access to secure messaging](#)" section above for more detail.

connections

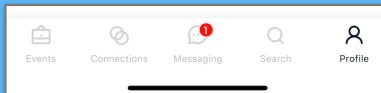
The client "connections" screen shows all the attorneys a client has connected with or has scheduled meetings with. After clicking the messaging icon on an attorney's card, the messaging window will be displayed. Again, the messaging icon will only turn orange once a client has completed an initial consultation.

notification indicators

XIRA displays new, unread messaging in red next to the notification icon in both the browser and mobile app.



browser notification indicator



mobile notification indicator

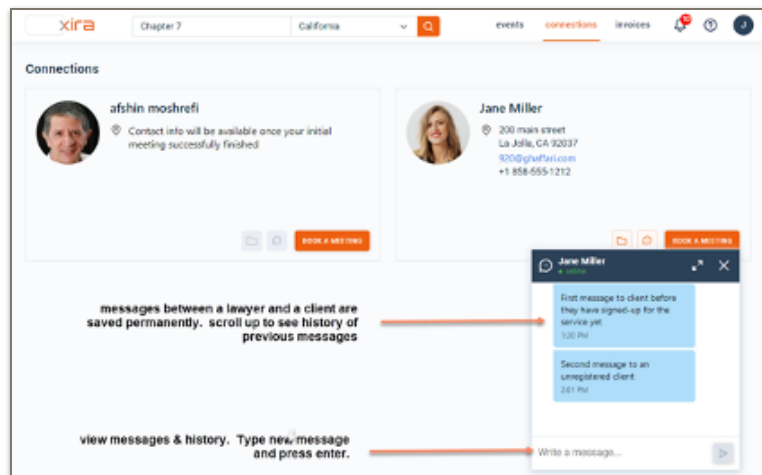
have questions?
for any other questions you
may have, send an email to
info@xira.com

get XIRA's free
mobile app now!



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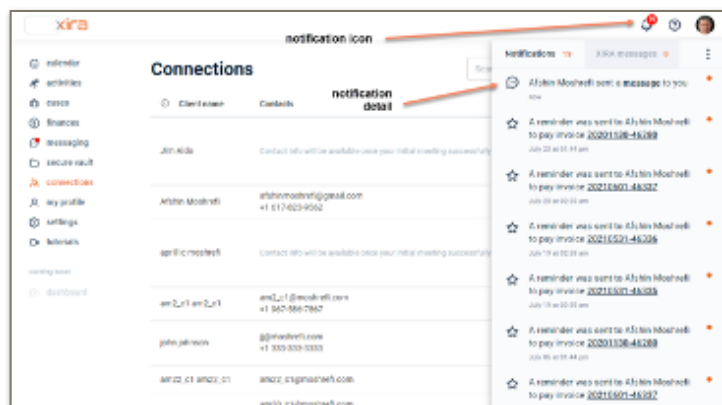
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client connections view

notifications

XIRA's platform informs you and your clients when any new, unread message have been received. A red number will appear next to the notification indicator (bell icon) located at the top of the browser, or next to the messaging icon in the mobile app. When the notification is clicked, the indicated message will be displayed. If a message has not been checked for 15 minutes, an email is then sent to the attorney or client informing them that a new message has arrived.



attorney notification view

You are now an expert at using XIRA's
secure messaging functionality!

stay current with XIRA's latest activities and media coverage. check out our [press page](#) and like and share our social media pages

