

Using Technology to Enhance Client Communications

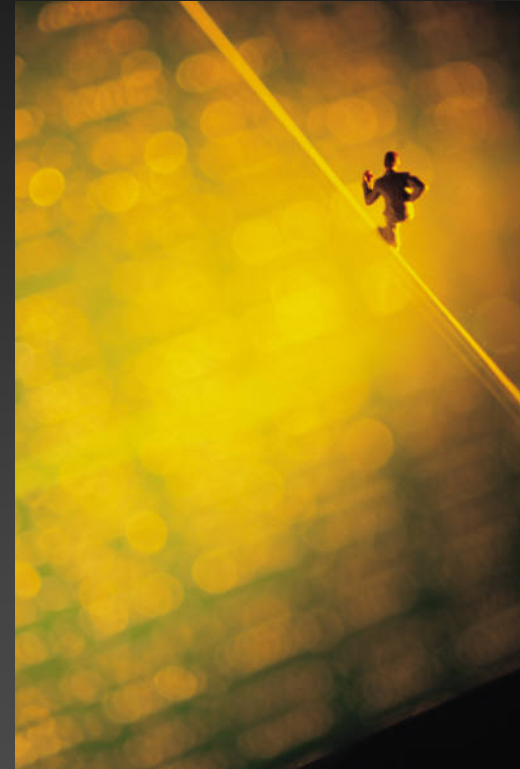


Catherine Sanders Reach, MLIS
Director, Legal Technology Resource Center
American Bar Association

Arkansas Bar Mid-year Meeting – January 2008

21st Century Client Communications

- Opportunities:
 - More, better ways to interact, educate, collaborate, and communicate with clients
- Challenges:
 - Perception of being on call 24/7/365
 - No time to think



Client Communication is Key

Rule 1.4 Communication

A lawyer shall:

- (3) keep the client reasonably informed about the status of the matter;
- (4) promptly comply with reasonable requests for information;

... excerpted from ABA Model Rules of Professional Conduct 2007

Arkansas Bar Mid-year Meeting – January 2008

Client Communication is Key

Most frequently violated rules -

#1: Arkansas Model Rules 1.3

(a lawyer shall act with reasonable diligence and promptness in representing a client.)

#3: Arkansas Model Rules 1.4(a)
(communication)



(source: [AR Supreme Court Committee on Professional Conduct 2006 Annual Report](#))

Communication in the 21st Century Law Office

- How does the client want to communicate?
 - Fax? Paper? Email? Website? Telephone?
 - Be able to deal with client's technology needs, not make the client deal with yours
 - Discuss appropriate delegation
 - Staff will handle some client communication
 - Manage expectations
 - Do you have a guaranteed response time?

Communication in the 21st Century Law Office

- Guard the client's confidentiality – whatever the communication vehicle
 - Ask questions when a client gives you a email address (personal or work?)
 - Beware the unsecured nature of e-mail
 - Know about metadata
- Let the client know that they have a duty to guard confidentiality as well

Invoices as Client Communication

- Don't use shorthand or cryptic descriptions
- Use professional software to create professional invoices
 - Time/billing software
 - Practice management software
- Show the value of your bill
- Check out *How to Draft Bills Clients Rush to Pay* by J. Harris Morgan (ABA Books)

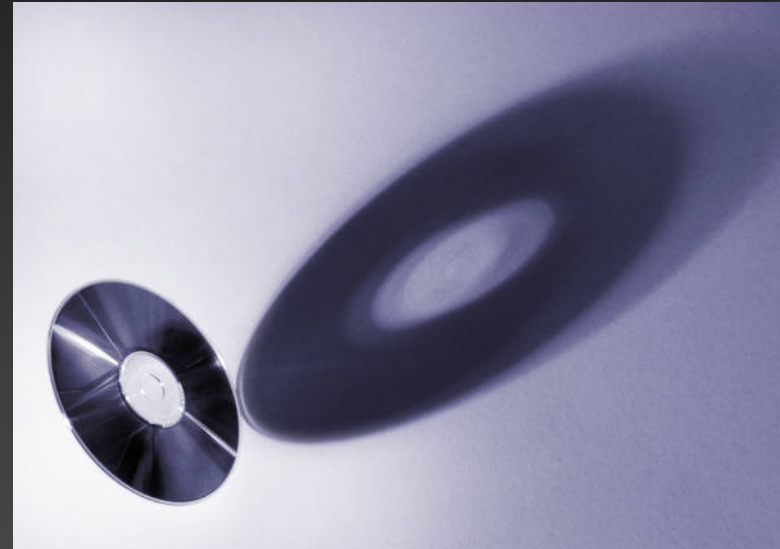
Engagement letters

- Importance of engagement letters or attorney-client contracts
- Type of client (consumer vs. business) makes a difference
- Consider a case plan instead of an engagement letter



Managing the Matter

- Invest in Law Office Software
- One or a combination of:
 - Time/billing/accounting
 - Don't forget PDA/Smartphone
 - Conflict of interest checking
 - Calendar/docketing
 - Case/practice management
 - Document management
 - Document assembly



Tools for Collaboration

- Engage the client in the work
 - Web conferencing
 - E.g. Webex, Acrobat Connect, GotoMeeting
 - Wiki applications
 - MS SharePoint
 - Extranets
 - PDF collaboration

Keeping Clients Top of Mind

- “Automagic” communication
 - Clipping services
 - [Google News Alerts](#), [Google Alerts](#), [GoogleAlert](#)
 - eNewsletters
 - Shared Research
 - [Google Notebooks](#), [esnips](#)
 - Blawgs

Sharing and Caring

- Contact clients once a week
 - Even if there is no news
 - How to remember? Use tasks, to-dos, calendar
- Publish your calendar
 - iCal, [Google Calendar](#), Outlook calendar save as, etc.



Before, During and After Representation

- Customer Relationship Management
 - Garbage in, garbage out
 - Keep it up to date
 - Incentive for use?
 - Examples: Act!, Interaction, MS Outlook, Practice Management software, Time and Chaos
- Social Networking
 - [LinkedIn](#), [LawLink](#)
 - And for the more daring: [YouTube](#), [Facebook](#), [Second Life](#)...

How to Capture and Keep Clients

- Stop, look, and listen
- Communicate
- Establish and meet expectations
- Pick the “right” clients
- Seek feedback
 - [Zoomerang](#) and [SurveyMonkey](#) for online survey tools that are easy to use and inexpensive

Questions?



Catherine Sanders Reach
312-988-5053
sandersc@staff.abanet.org
www.lawtechnology.org

Arkansas Bar Mid-year Meeting – January 2008