WORKING WITH CLIENTS WHO LIKE TO DIY

By: Danielle DavisRoe, Esq.

Today's lawyers are practicing in the age of YouTube, where anyone can learn anything from a ten-minute vide online. Many people take pride in doing everything themselves. You can capitalize on your clients' desire to do more themselves, at their convenience, and take administrative burdens off yourself, all while commanding a higher hourly rate for the work that your clients value.

The keys to success are keeping information secure, reducing paper, using new communication methods, and enabling self-help. The younger generations prefer texting and social media; they don't want to talk on the phone, and they don't check their email very often. Communicating with them requires new methods. Let clients do as much of the work as they can, and they will be willing to pay for your legal advice and pay a higher hourly rate where they truly need an attorney.

CLIENT INTAKE

Start by making client intake easier on your DIY-minded clients. Let them schedule appointments without sending an email or making a phone call. Reduce paper with digital signatures on retainer agreements. Make your intake forms digital and easy to complete from anywhere.

SCHEDULING

Many clients don't want to call your office or email you to schedule an appointment. Instead, let them schedule appointments from your website. Services like Microsoft Bookings and Calendly sync with your calendar, allowing clients to see when you're free and schedule an appointment directly on your calendar.

Letting clients schedule appointments for themselves seems intimidating at first, but you can set up rules to protect your time. Buffer time adds additional time before or after the appointment, ensuring that you have time to prepare for the meeting or organize your notes afterward. You can limit how soon clients can schedule appointments, ensuring plenty of heads up to prepare for the appointment. You can also limit how far in the future someone can schedule and limit what hours are available each day of the week.

Your more sophisticated clients and prospects can use links in their appointment confirmation email to move, change, or cancel a booking with no intervenrtion on your part. Further, you can configure appointment invitations to contain links to Zoom (or other web meetings) so it’s clear to everyone where to “meet”.

RETAINER AGREEMENTS

Tech-savvy clients don't want to sign and return paper retainer agreements. Electronic signature software like DocuSign, RightSignature, and Adobe Sign allows you to set up and route documents for signatures easily. Adobe Sign, included with Adobe Acrobat Pro DC, allows you to prepare pdfs and route them for signature all with your pdf software.

INTAKE FORMS

Clients struggle with completing intake forms at your office. They rarely have all of the information needed to complete the form fully. Further, handwriting can be difficult to read. Instead, use an electronic intake form to allow clients to type the information from their mobile device conveniently.

Online form and survey tools like Microsoft Forms, Google Forms, and Survey Monkey make it easy to ask for and collect information. Document automation software like XpressDox and TheFormTool's Aurora allows you to create more complex client interviews. Some lead generation and customer relationship management ("CRM") tools include this functionality so that you can integrate with your practice management software and even place forms on your website.[1] When selecting an intake form tool, ensure they meet the security requirements in your jurisdiction or practice area for the data you collect, e.g. HIPAA compliance for medical information. The free version of many tools is less secure than the paid version.

SHARING INFORMATION

CLIENT PORTALS

Many matter management programs have an option to create client portals. Client portals allow you to securely share information such as messages, documents, notes, calendar events, and billing. Not all client portals have the same capabilities. Allowing clients to access information securely anytime alleviates the administrative burden of sending information over email or by mail. When clients can help themselves to the information they need, they call and email your office less often. Many cloud-based matter management programs include this functionality and let you control what information, if any, individual contacts on a matter can see, e.g. clients, expert witnesses, and co-counsel need not share one set of privileges.

SHARING DOCUMENTS

Beyond client portals, you can easily create shared document locations using document management software such as NetDocuments or file-sharing software such as ShareFile. If you already have document management, take advantage of its ability to created shared spaces. With NetDocs, you can create CollabSpaces shared with licensed external accounts, giving you administrative control over your clients' accounts, and allowing you to continue storing documents in NetDocuments regardless of whether you share them with a client. ShareFile allows you to create collaborative folders, securely send documents by email using an Outlook add-in, and request files be securely sent to you by your clients using an upload link.

GETTING PAID

FLAT FEE

People want to know how much your legal representation is going to cost. Giving them flat fee options help them budget and helps you get paid faster. Create a menu of flat fee services. For example, in estate planning, create packages that include different levels of planning, such as (1) health care directives only, (2) basic will and health care directives, and (3) pour-over will and basic trust. Then, if people need more, you can bill them hourly for the additional services - make sure it's clear in your engagement letter what isn't included in the flat fee.

Depending on the jurisdictions you practice in, you might be able to get paid upfront. Otherwise, create a payment schedule for your clients to make regular payments over the course of the representation.

Continue to track your time on flat-fee engagements. Tracking your time allows you to calculate your hourly rate. You may need to adjust your flat fees for new engagements if you realize you aren't earning as much per hour as you'd like. Tracking your time also memorializes all of the work you did on the matter if a dispute arises over the representation.

---

[1] For example, Clio Grow, formerly Lexicata, lets you create and distribute intake forms and send engagement documents for esignature. Unsurprisingly, it works nicely with Clio Manage, Clio's case management software. You can add links to intake questionnaires on your webisite. Further, if your website is running on WordPress, you can embed a full questionnaire directly on your website.

MAKE IT EASY

Make it easy for clients to pay you with an online payment solution like LawPay. Services like LawPay allow you to add a payment link to your website, allowing clients to pay at any time, from anywhere. They also allow you to schedule payments for clients. When selecting an online payment solution, make sure the vendor understands trust accounting and can take fees from your operating accounts while depositing funds into your trust account. LawPay is the 800 lb. gorilla in this market and it integrates directly with many top practice management, timekeeping, and invoicing partners. When a client pays a bill, you not only get paid instantly and paperlessly, but the proper invoice and matter are credited in your accounting or practice management program.

SELF HELP

DATA ENTRY

Let clients enter their data. Not only does it save you time, but it also saves your clients money. While digital client interviews are a great start, you can go a step further and collect all of the data you need as the representation progresses using client interviews. Document automation software like XpressDox and TheFormTool's Aurora allows you to collect data as needed.

SELL TEMPLATES

Consider competing with services like Legal Zoom by selling your templates. Depending on the rules of the jurisdictions you practice in, you may be able to sell templates outright. However, you may need to sell templates packaged with legal advice. When selling templates, consider adding help text to guide clients through the process of drafting their documents. Create templates that have options limited to particular fact patterns. When selling templates packages with legal advice, you can advise them on which templates they need, review the templates with the clients after they complete them, represent them in court, or help them with negotiations.

DISCOUNTS

Many bar associations have discounts for many of the vendors mentioned here. Check with your bar association for possible discounts.