



Client satisfaction checklist for legal firms



This checklist helps determine just how modern and comprehensive your communications-enabled client engagement plan is throughout an entire client or new prospect encounter.

1. Evolving client expectations

- Can your communications system engage clients on the channel of their choice?
- Are you able to call, fax, message, and video conference with clients from one platform and one app?
- Does it let you serve your clients as one brand across multiple products or multiple practices within your legal group?

2. Client engagement process

- Does your phone system allow clients to reach the right person the first time and without assistance?
- When a client schedules an appointment, can you send an automated reminder notification with date, time, address, and rescheduling assistance as an integrated capability on your phone system?
- Can you host instant video conferences with your clients across locations?

3. Virtual law office

- When a client calls your office, is the call automatically routed to more than one channel, such as a desk phone and a mobile phone?
- Do your attorneys have the ability to maintain a unique corporate identity on their own personal phones while hiding their personal number?
- Does your communications system allow you to work from anywhere with a laptop, tablet, or smartphone?

4. Integration

- Does your client account information automatically pop up on your computer screen when a client calls your office?
- Are your clients' records and transactions secure and integrated with your communications system to deliver a higher level of productivity?
- Does your phone system provide call logs to track billing hours and improve accurate client billing?

5. Client relationship management

- Can you view and analyze client communications for faster service and insights?
- Can your communications platform record your calls with automatic call recording and store recordings for depositions over the phone, use in court, and staff discovery process?
- Does your communications platform have the ability to monitor calls in real time to help your legal assistants improve their overall interactions with clients?

6. Collaboration

- Does your communications system provide collaboration with multiple stakeholders within your practice to provide streamlined workflow management?
- Does your communications system provide visibility to your service delivery team on the latest discussions across various cases?
- Does your communications system allow your team to respond to clients effectively on their channel of choice?

If you left any of these unchecked, your communications platform is likely not keeping pace and likely falling short of your clients' expectations.

To stay competitive, legal firms must view communications as a centerpiece of a client-centric, comprehensive, tech-enabled strategy. RingCentral provides a robust, secure, and compliant communications system to help improve client engagement and overall satisfaction.

Learn more about how RingCentral helps Law Firms (www.synergizebiz.com) today. **Please call 805.673.4175**

