# CLIENT EXPERIENCE (CX) AUDIT CHECKLIST

Ensure Your Family Law Firm Stands Out by Delivering a Seamless, Client-Centered Experience. Every. Single. Case.

MODERN SPLIT MEDIA

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# HI.

You already know that running a family law firm isn't just about winning cases - it's about guiding clients through one of the most stressful chapters of their lives. The truth? The firms that stand out (and get the most referrals) aren't always the ones with the fanciest offices or the longest list of credentials. They're the ones who nail the client experience.

That's where this audit comes in. Think of it as your quick check-up: a way to see where your client journey shines, where it stumbles, and how a few simple tweaks can turn "just another law firm" into the go-to firm clients rave about.

This isn't about adding more to your plate - it's about making what you already do work harder for you.

Ready? Let's see how your firm stacks up.

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**1. First Impressions Matter**

◻ Is your website easy to navigate and mobile-friendly?
◻ Are contact details, office hours, and consultation booking options clearly visible?
◻ Do you have an FAQ section addressing common client concerns?
◻ Is your branding consistent across all touchpoints (website, emails, social media, etc.)?
◻ Are online reviews being monitored and responded to professionally?

**2. Inquiry + Intake Process**

◻ Is your response time to inquiries under 24 hours?
◻ Do you provide automated confirmation emails when a client submits a form or books a call?
◻ Is the intake process streamlined, with clear instructions and minimal friction?
◻ Are prospective clients given a clear overview of what to expect in their first consultation?
◻ Is your staff trained to handle inquiries with empathy and professionalism?

**3. Communication + Case Updates**

◻ Do you set clear communication expectations (response times, preferred contact methods, etc.)?
◻ Are case updates provided proactively, reducing the need for clients to chase information?
◻ Is there a secure client portal for easy document access and communication?
◻ Do you provide clear, jargon-free explanations of legal processes?
◻ Are follow-up emails or summaries sent after key meetings?

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**4. Client Education + Resources**

□ Do you provide written guides, videos, or webinars to educate clients on their legal journey?
□ Is there a dedicated space on your website for legal FAQs, blog posts, or case studies?
□ Do you send clients reminders about upcoming deadlines or important dates?
□ Are clients informed of all their options (including alternative dispute resolution methods)?
□ Do you have a post-case guide to help clients transition after legal proceedings?

**5. Billing + Financial Transparency**

□ Are fee structures and billing practices explained upfront and in writing?
□ Do you offer flexible payment options or plans to reduce financial stress?
□ Are invoices clear, itemized, and free of surprises?
□ Is there a process in place to handle billing disputes efficiently?
□ Do you provide cost-saving tips where applicable?

**6. Client Satisfaction + Retention**

□ Do you collect feedback through surveys or follow-up calls after case closure?
□ Is there a referral program or incentive for past clients to recommend your firm?
□ Do you maintain a client newsletter or resource updates to stay top-of-mind?
□ Are past clients invited to free webinars, Q&A sessions, or community events?
□ Do you have a strategy to re-engage past clients who may need future services?

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**7. Internal CX Systems + Staff Training**

◻ Are all staff members trained in delivering a client-first experience?
◻ Do you have a standardized process for handling difficult or emotional clients?
◻ Are internal workflows optimized to prevent client frustration and delays?
◻ Is there a centralized system to track client interactions and prevent miscommunication?
◻ Do you conduct regular team meetings to address and improve CX issues?

**8. Online Presence + Reputation Management**

◻ Are you actively engaging with potential clients on social media?
◻ Do you respond professionally to both positive and negative reviews?
◻ Are client testimonials showcased on your website and marketing materials?
◻ Do you have a content strategy (blogs, videos, posts) that positions your firm as an authority?
◻ Are you monitoring your online reputation and making necessary improvements?

So… How'd you do?

**Next Steps Action Plan**

**1. Celebrate What's Working**
Write down 2–3 areas your firm is already doing well. Start with the wins!
◻ ______________________________________________
◻ ______________________________________________
◻ ______________________________________________

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**2. Pick Your Top 3 Focus Areas**
Which areas will make the most significant difference if improved? Highlight your top three.

_______________________________________________

_______________________________________________

_______________________________________________

**3. Create Your 30-Day Mini Action Plan**
Break your focus areas into manageable steps, one per week.
Week 1: _______________________________________
Week 2: _______________________________________
Week 3: _______________________________________
Week 4: _______________________________________

**4. Assign Owners + Accountability**
Who’s responsible for what? Write it down so nothing slips through the cracks.
□ Task: ______________________ | Owner: ______ | Due: ______
□ Task: ______________________ | Owner: ______ | Due: ______
□ Task: ______________________ | Owner: ______ | Due: ______

**5. Re-Audit + Repeat**
Check back in 30 days. What’s working? What still needs attention?
What improved: ___________________________________
Needs more work: ________________________________
Next steps: _____________________________________

Pro Tip: Don’t try to fix everything at once. Tackle a few high-impact areas first. Small wins build momentum and create lasting change in your client experience.

Ready to Take It Further?

If you’d like expert help turning this plan into a streamlined, client-centered system that boosts referrals and saves you time…

Request a Private Consultation today