Using Case Management Software to Retain and Serve Clients

by Matt Ryan

If your firm has a case management program (or is thinking of getting one), then you know that software systems like these will help staff better organize all their sometimes scattered pieces of client and case information, remind people of important deadlines, help everyone handle their matters more efficiently, and, in general, restore order to the galaxy (also known as your office).

What you might not realize is that, beyond the obvious time-and-cost-saving benefits a case management program provides, you also get (at no additional charge) a built-in system for providing exceptional service to your clients in several different, yet related, ways.

A definition of client service.
Client service can be defined as assessing, anticipating and fully meeting a client's needs and expectations. More directly, that means keeping clients happy and informed. Remember, once people become your client, they want to remain your client forever and don't really ever want to leave. So, a client you keep happy is a client you keep. When clients do leave, however, it's often due to minor oversights and a perception that you haven't paid enough attention to their needs (and perception is nine-tenths the law). By tapping your case management system's resources, your staff can draw upon the substantial body of expertise and experience that your office possesses and easily provide clients with pro-active and practical assistance that will keep them coming back for more.

My experience has shown that case management systems can help provide better client service in four major areas: client inquiries, scheduled contacts, knowledge management and trend spotting/reporting.

Client inquiries:
An opportunity to shine.
When clients call with a question, they give you a fantastic opportunity to show them how much their business means to you and how prepared you are to help them. And a receptionist equipped with a basic feature inherent in most case management programs presents your first chance to shine in their eyes. Armed with an easily accessible electronic case list, which lists all matters and the staff currently assigned to each matter, the receptionist (or anyone in the office) can quickly transfer phone calls to the "right" person, so clients avoid being passed around several times until they finally talk to someone who knows what's going on with their case. This may sound simple, but in many firms, just knowing who's working on a matter is not always common knowledge.

And when the client calls specifically asking for the attorney handling their file, and that attorney is in a meeting, in court or out of the office somewhere, you have another chance to answer the client's issue immediately. Rather than send the client to the attorney's voicemail

(which initiates rounds of phone tag), the call can be transferred to another available team member, who has all the pertinent case information at their fingertips to answer the client's question.

In this scenario, everyone with whom the client comes in contact has the potential to be helpful, leaving the client with the impression that everyone in the firm is accessible, knowledgeable and cares about his or her matter…and it's true!

Quick tip: Use your program's "pending phone calls" for a list of calls you need to return or initiate.

Stay in touch with scheduled contacts.
In addition to recording day-to-day matter notes and activities, every case management program has (or should have) an integrated tickler or reminder system that staff can use to ensure they contact their clients on a routine basis. These periodic "touches" can be as simple as a quick case status phone call or an e-mail attaching a summary of activities to date.

Vary the type of contact. A phone call this month, followed by an e-mail next month, then a letter enclosing an article you think they'd find interesting. And choose frequency over volume, meaning

you'll get more mileage from several touches that are short and to the point than from a lengthy publication sent once a year.
Quick tip: Send birthday and holiday cards. Most clients--current and former--enjoy getting them.

Share the wealth of knowledge.

Knowledge management refers to sharing the depth and wealth of information among staff so everyone in your organization can provide exceptional service to clients. The more people know about your clients, the more they can do to help. The information stored in your case management program is full of useful information for providing better service now and for generating business in the future.

When made accessible to the entire firm, client data then reveals the relationships between people and companies, past involvement with your firm, and a client's personal and business interests. And all it takes is short note that lists things like family members, where their children attend college, hobbies, community activities, etc. It's truly the little things that will stand out to your clients.

On an everyday basis, you can keep all team members informed of relevant information relating to client matters by routing them messages, phone call notes and notifications of the receipt of important documents.
Quick tip: Attach an alert note on the client's contact card that'll grab the staff member's attention and remind them of important issues or special circumstances.

Be a trend spotter.

The various reports that come with your case management program will help you take a proactive, rather than reactive, approach to providing client service. Not only should you know when the client last contacted or which clients need attention, but you can also you your case management information to anticipate staffing needs, identify training areas and plan workshops to focus on these issues.

For example, by looking at the volume and frequency of phone calls relating to various topics or issues, you'll undoubtedly see trends. You can use that information in a number of forward-thinking ways, including providing staff with information to help them to respond to various "hot" issues or posting related articles and solutions on your firm's website. At the very least you'll be able to identify which clients call the most or least often, which may signal a need for management to investigate further.
Quick tip: Run a "client communication" report every month to see when each client was last contacted.

Take advantage of what you've got.

If your office already uses a program like Outlook to store client/contact data, that's information you'll likely want to preserve.

These programs can work in unison with your case management system and allow you to copy or synchronize those contacts, so you can avoid duplicate entry and have your client's personal information along with their case/matter related information.

Another type of program called client relationship management (CRM) software, stores similar client information and much more. You may find that you prefer using the CRM features already built into your case management system, or may want to link the two programs. What you want to avoid is re-entering the same information in multiple places. If you use a popular CRM product, like Interaction, you should be able to link your client's data from that system to your case management system (ask your case management vendor to show you how).

The bottom line.

It makes good economic sense to make client service the highest priority at your office. And by making your case management program the hub of pertinent, easily retrievable client information, everyone in your organization will have more opportunities to satisfy your clients and make them feel certain they chose the right law firm.

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