



*Hey, Lawyers*

# What are your clients saying about you?

This report contains a series of discerning research summary insights. It covers business, personal and corporate clients' expectations in relation to the service level they received from their lawyer/law firm/in-house counsel.

[www.lexisnexis.co.nz](http://www.lexisnexis.co.nz)

The report was commissioned by LexisNexis New Zealand and prepared by Kantar, a member of the Research Association NZ. All the information provided in the report is confidential.



**LexisNexis®**

# What are your clients saying about you?



In 2016 LexisNexis commissioned research to provide an overview of the current perceptions and delivery of legal services in New Zealand. LexisNexis commissioned this update of the research in early 2023 to evaluate changes over time and include new insights on expectations on the role of technology in client relationships and the impact of the global pandemic. The research results were gathered from over 420 respondents across five client groups.

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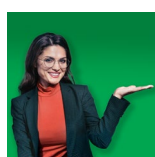
# Research Insight Contents



## Part 1

### Legal Service Expectations

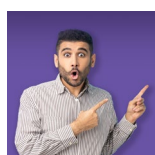
Page 4



## Part 2

### Perceptions of Legal Professionals

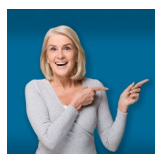
Page 10



## Part 3

### Decisions and considerations in engaging legal services

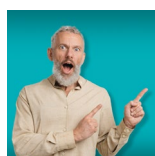
Page 16



## Part 4

### Innovation in legal services client engagement

Page 20



## Part 5

### How to be Exceptional

Page 28



## Part 6

### What can in-house counsel do better when engaging with corporate decision-makers?

Page 33



## Key Learnings

### Action Checklists

Page 41

*Hey, Lawyers*

What are your clients saying about you?

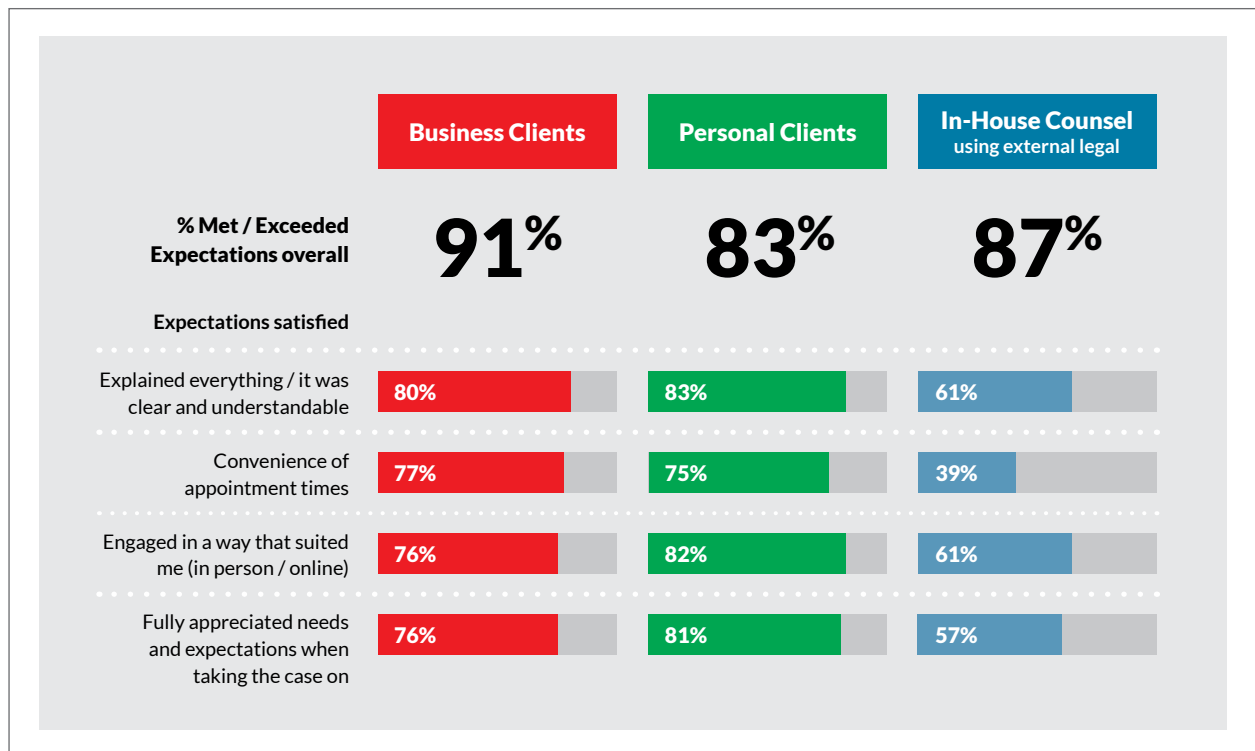
# Legal Service Level Expectations

Part 1-of-6



# Legal Service Level Expectations

This first insight will cover business, personal and in-house counsel expectations in relation to the service level they received from their lawyer/law firm.



## Satisfaction levels

Overall satisfaction levels are high across all client groups ranging from 83% for personal clients through to 91% for business clients.

The big question here is Exceeded Expectations only made up a small percentage of the above data. For Business Clients, it was 14%, Personal Clients 20% and In-House 9%. Research shows that clients who cited Exceeded Expectations were more likely to refer friends and family and retain services for future matters.

Lawyers and firms should find ways to understand their client's needs on what does Exceeded Expectations looks like to them.

## 2023 Insights

*"Wrote a strong argument and constantly fact checked and sought my approval"*

*"Took the time to explain everything well and understood my needs"*

## Satisfaction levels as compared to 2016

## Business Clients



6%

Fully appreciated needs and expectations when taking the case on



6%

Kept to the agreed timeline



11%

Personally responded to emails / calls within 24 hours



6%

Provided clear indication of likely cost of work or fixed fee

**Business clients** Despite a slight decrease of 6% compared to 2016, lawyers are focused on making things clear and understandable. Lawyers are actively engaging with clients in a suitable manner, appreciating their needs, and offering convenient appointment times. The greatest opportunity is in the area of fee structure clarity and costs, and there is room for improvement in providing updates and responding to queries in a timely fashion.

## Personal Clients



8%

Fully appreciated needs and expectations when taking the case on



8%

Kept to the agreed timeline



4%

Provided you with regular updates on progress



4%

Provided clear indication of likely cost of work or fixed fee

**Personal clients** Lawyers are successfully engaging and explaining in a clear and understandable way to their personal clients. More clarity is needed on fees structure and costs, as well as timely updates and communications.

## In-House Counsel using external legal - satisfaction Levels

No data available from 2016

65%

Fully appreciated needs and expectations when taking the case on

65%

Were good at listening

39%

Ease of making an appointment

35%

Waiting time for appointments

**In-house counsel using external legal** Lawyers positively appreciate in-house counsel needs and listen and engage appropriately. However, there seems to be an issue with timeliness, with ease, and convenience of making appointments that needs to be addressed.

# Letter of Engagement

For their most recent legal engagement, 17% of business clients and 13% of personal clients were without a Letter of Engagement, with 1 in 10 and 1 in 4 respectively unsure or couldn't remember if they had received such a document.



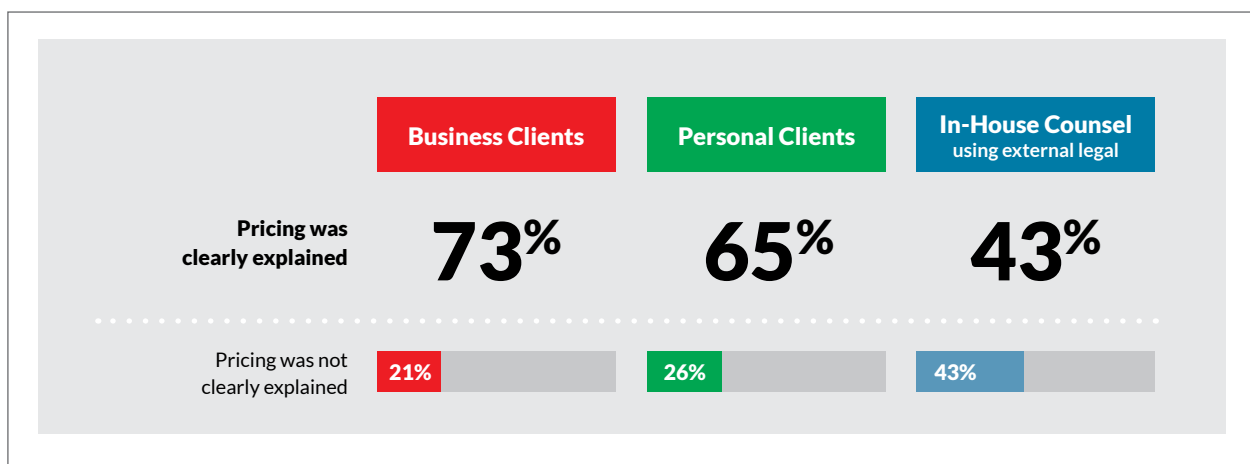
## 2023 Insight

*"There is room for improvement in ensuring all clients receive a Letter of Engagement and understand its content."*



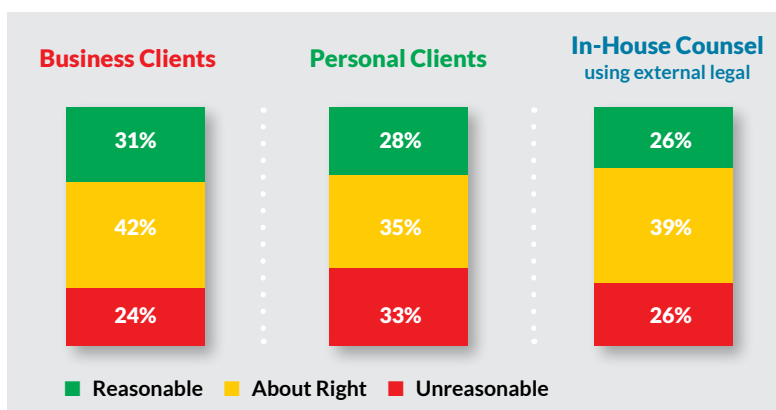
# Pricing Clearly Explained

The majority of business and personal clients say pricing was explained clearly, and this has increased since 2016. However, this is not the case for in-house counsel, where 43% say the pricing was not clearly explained.



## Perception of fees

The perception of fees by business clients are mostly stable between 2016 and 2023, while personal clients felt fees were more unreasonable in 2023. There is room for being clear on pricing, with 1 in 4 to 1 in 3 finding pricing unreasonable in 2023.



# 42%

## Payment terms

Over 40% of business and personal clients agreed to a fixed fee for their legal services. From 2016 to 2023 there has been a move to fixed fees instead of hourly fees. In-house counsel using external legal services were predominately on an hourly fee.

## 2023 Insight

*“Providing a clear picture of what services the client will receive for their payment is a good way to set expectations and show the value. Due to the Covid pandemic and the current inflationary economic climate there seems to be a move to more fixed fee pricing to obtain more certainty for budgeting purposes.”*



# Meeting Expectations

## 2023 Insight

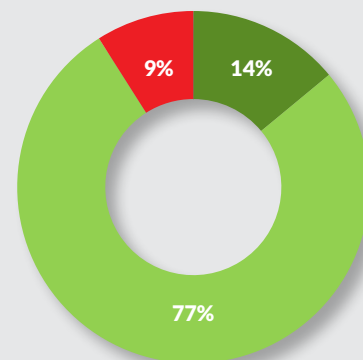
*“Research shows Exceeding Expectations drives better referral and repeat business.”*

### Business Clients

**Business clients** – the delivery of service is in line with their expectations for the majority of clients, and those who say their expectations were not met fell from 14% to 9% compared to 2016. Constant communication was a key factor in delighting clients.



Exceeded Expectations vs 2016

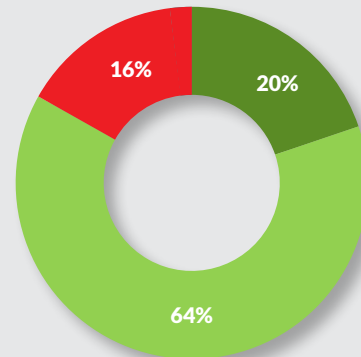


### Personal Clients

**Personal clients** - the level of service is mostly meeting their expectations and is similar to levels in 2016. Communication, being down to earth and delivery in the agreed timeframe were factors in exceeding expectations. Poor delivery of these same areas resulted in an experience falling below expectations.

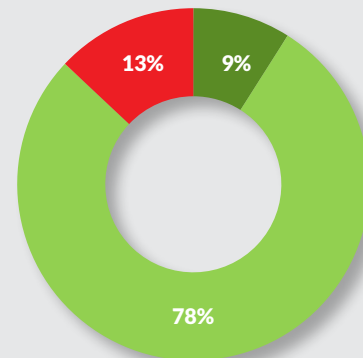


Exceeded Expectations vs 2016



### In-House Counsel using external legal

**In-house counsel** – service delivery is in line with initial expectations. Communication features strongly, as well as having the required knowledge. Timeliness needs to be improved with frequent summaries and updates on progress required so the work status is always known.



■ Exceeded my expectations   ■ Met my expectations   ■ Fell below my expectations

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What are your clients saying about you?

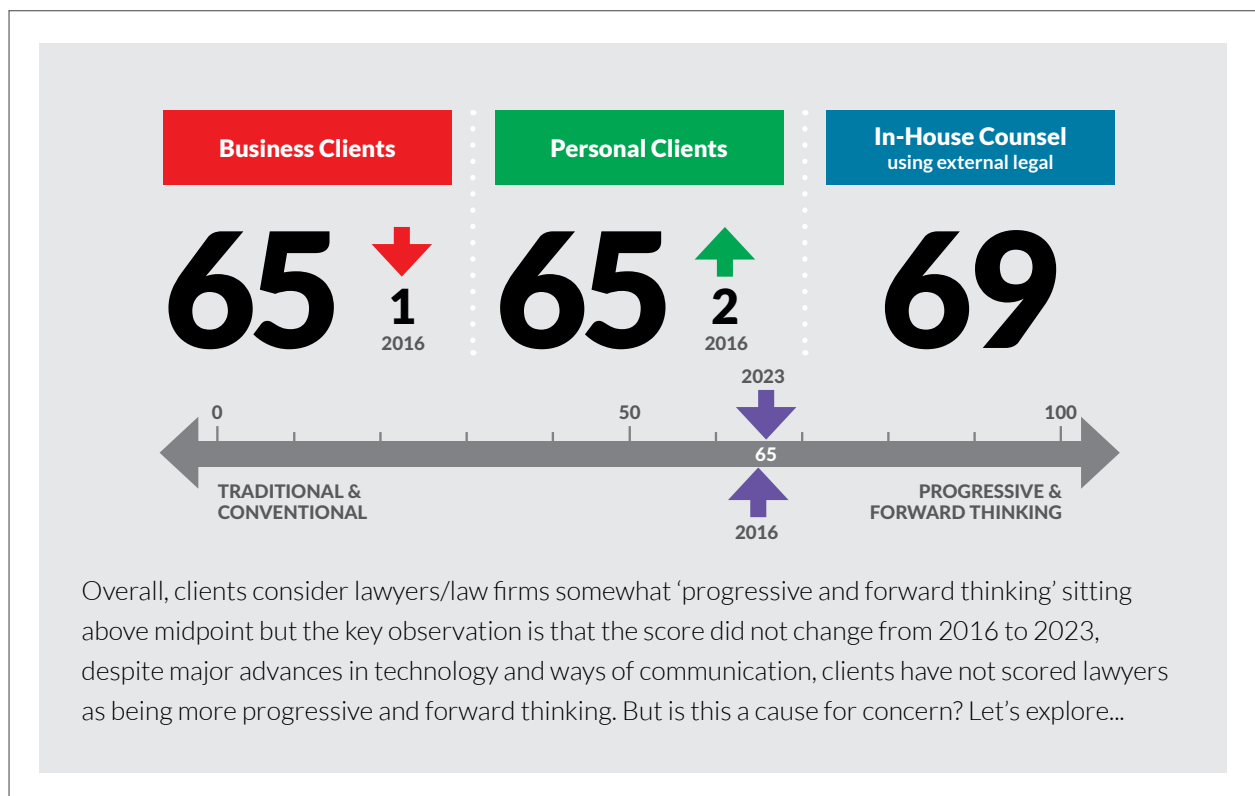
# Perceptions of Legal Professionals

Part 2-of-6



This **second insight** covers how law firms are perceived, how your performance rates relative to other industries and what attributes clients use to describe lawyers.

## Perceptions of Legal Firms



To attract more clients, keeping up to date is important, this is especially clear with In-house Counsel who are looking for progressive external legal representation. This is because In-house counsel are usually looking for specialist help.

- We have found that in the last seven years, perception has stayed similar between forward-thinking vs conventional lawyers. Is this perception an issue or concern and would it affect the way you engage with clients?
- What does progressive vs traditional mean to your clients and is it important for your business to be seen as either?

- Would you attract more clients if you were seen as progressive by embracing and using new technology to interact with your clients?
- Could progressiveness also be seen as being more actively engaged with your clients with regular and succinct interactions rather than the traditional approach as 'leave it with me and I will get it done?'

### 2023 insight

**Knowing what your customers perceive as progressive and traditional will help you provide the great service they want to receive.**

**“** *Talk to your clients  
and look at ways  
to personalise your  
service and develop  
your relationship  
for the long-term  
engagement.* **”**



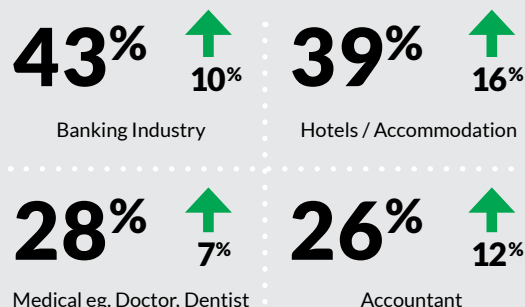
# Performance relative to other service industries

Perception of legal service is improving overall with comparable industries, (compared to 2016 research) but more can be learned from the services that are more personalised like hotels, medical and accountants.

## Business Clients

Perceptions have largely improved since 2016, with around 4-in-10 saying their legal service is better than utilities, real estate, airlines, banking and hotels. Also, better than in 2016 but still needs to be looked into is the 1-in-10 who claim that their legal service was worse than hotels, medical and accountants.

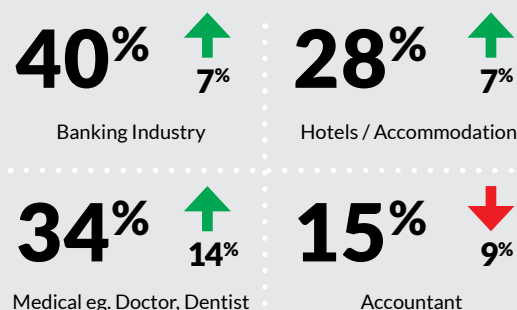
% of respondents that said Lawyers are 'BETTER' than...



## Personal Clients

Since 2016 perceptions have improved though legal is now more likely seen as on par with accountants. There has been significant improvement of perception relative to banking, medical and hotels, with better perception increasing and worse perception decreasing.

% of respondents that said Lawyers are 'BETTER' than...

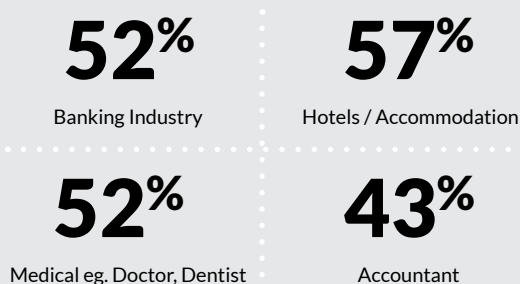


## In-House Counsel using external legal

No data available from 2016

The legal service is rated better than utilities and real estate, and the same as insurance, airlines, banking, hotels, medical and accountants.

% of respondents viewed Lawyers 'ABOUT THE SAME' as...

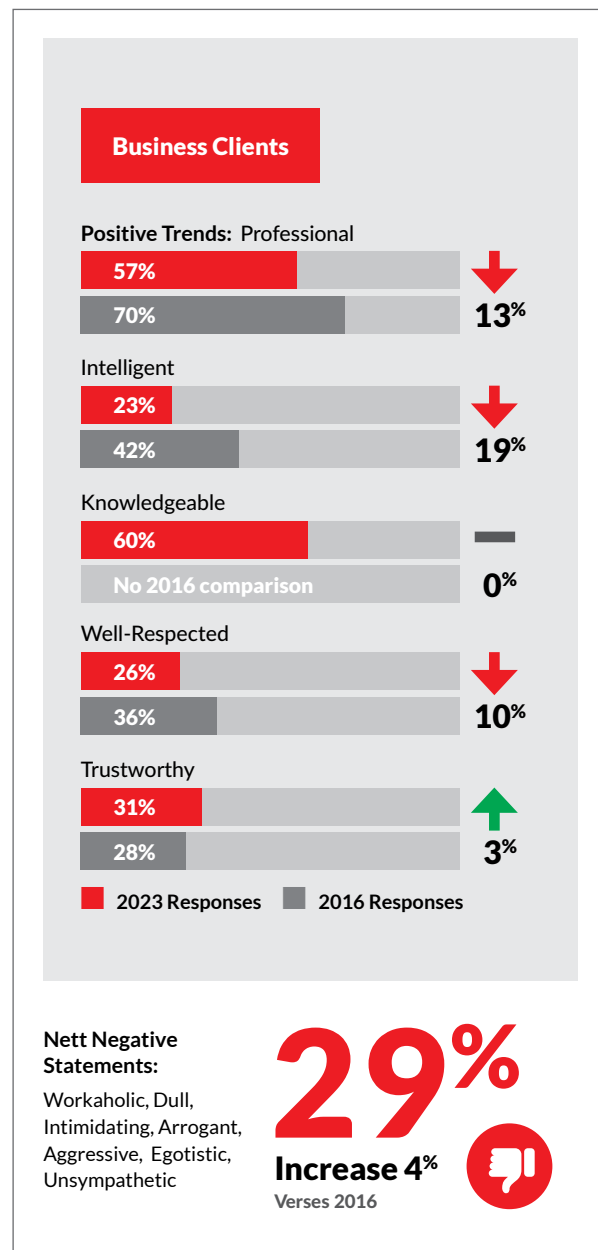


# Attributes to describe lawyers

All client groups have similar perceptions, which remain relatively similar over time, with Professional, Intelligent and Knowledgeable held widely. Trustworthiness as an attribute is still somewhat low on the list of positive association with lawyers and perhaps something lawyers and law firms should look to address.

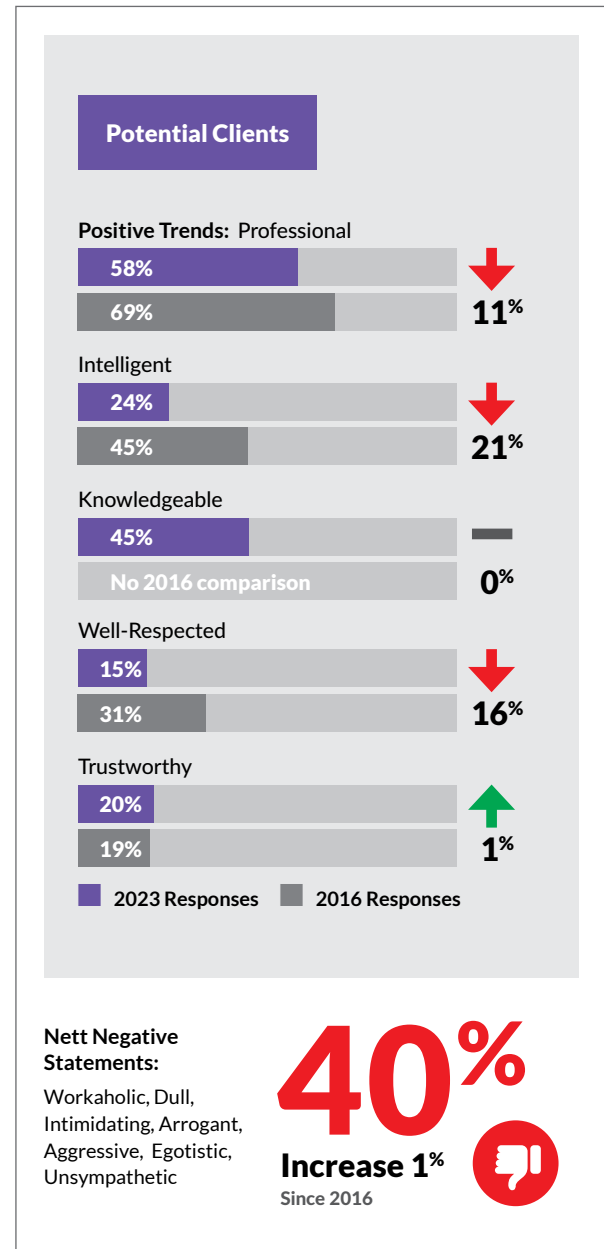
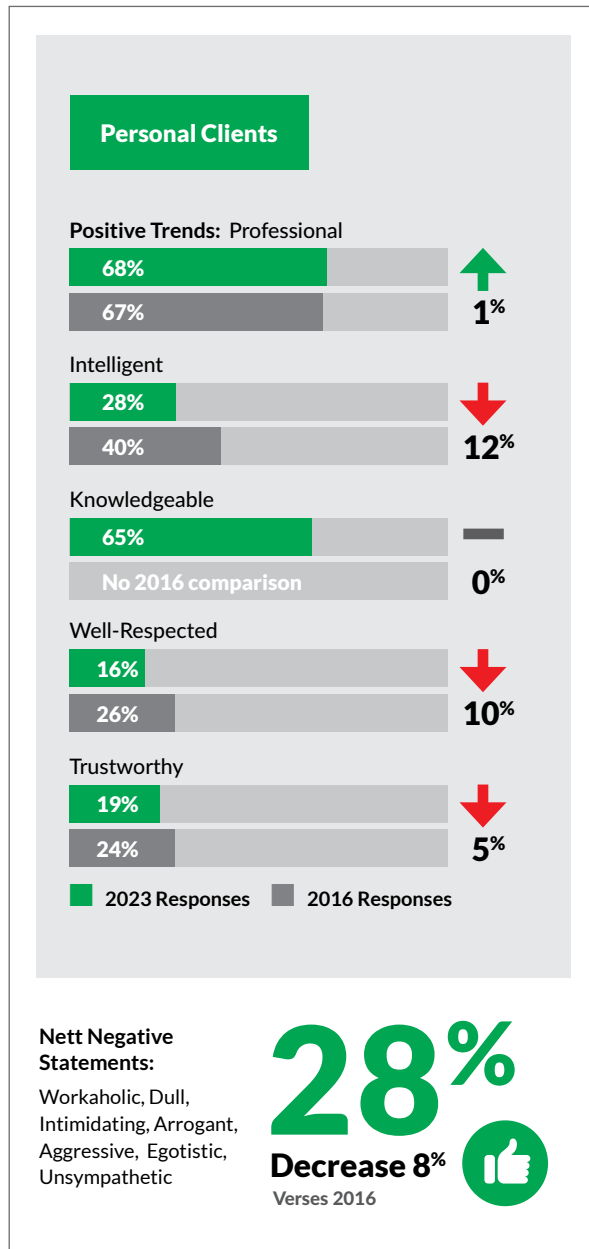
1-in-3 still having a negative perception of lawyers. This could be spurred by recent media coverage about one or two lawyers misusing their powers and the difficulty of accessing plain English legal help.

Business clients hold lawyers in higher regard in terms of being Well-Respected while personal and potential clients whom never interacted with a lawyer may find you intimidating, purely based on perceptions and something that the law firms may want to review in all of their marketing communications and websites.





# Attributes to describe lawyers



## 2023 Insight

*Review your engagement values to remove the negative attributes and make the client feel part of your legal family. Removing the negative perceptions will move your service from good to great, making you stand out from other lawyers.*



*Hey, Lawyers*

What are your clients saying about you?

# Decisions and considerations in engaging legal services

Part 3-of-6



# Information sources used to find a lawyer

## Business Clients



### Business clients

Recommendation and experience have dropped since 2016 in favour of using a more long-term relationships with a firms with specific experiences. Also an increase for Internet searches.

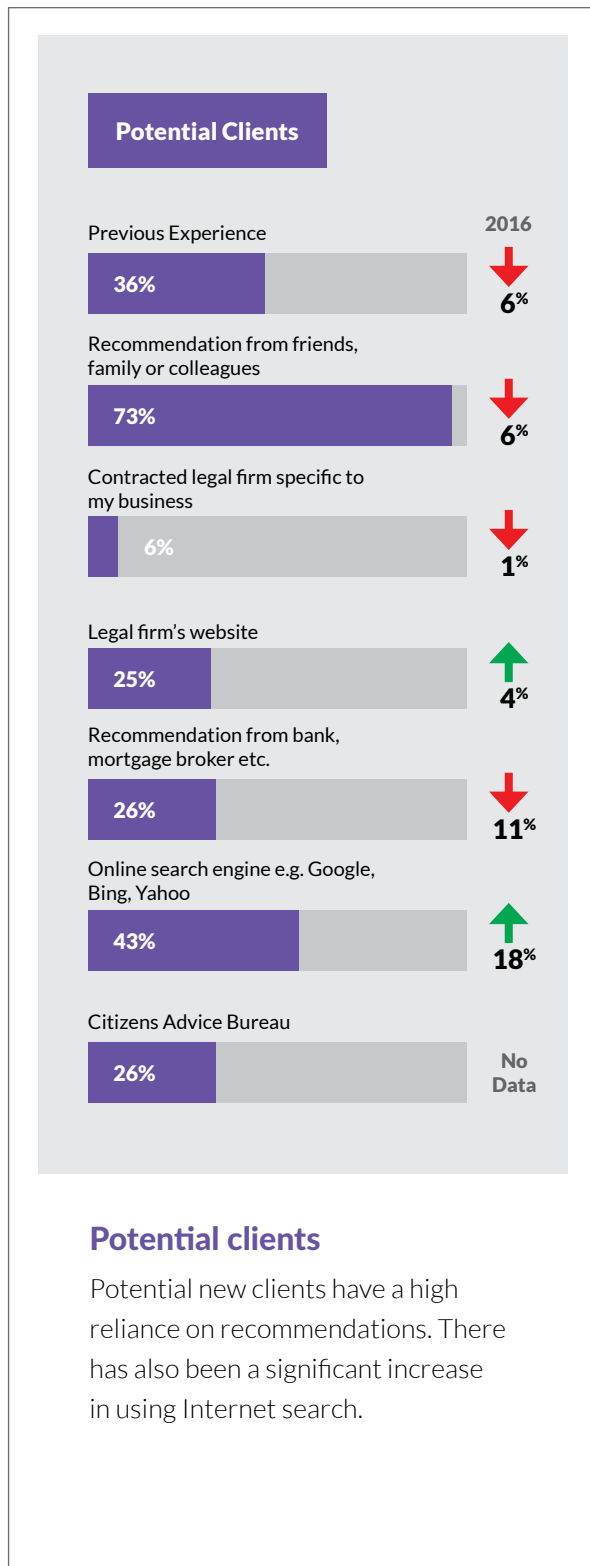
## Personal Clients



### Personal clients

Personal clients have a high reliance on recommendations from friends and family as well as other trusted organisations. There has also been an increase since 2016 in the use of online search and legal firm's website to research suitability.

## Information sources used to find a lawyer



### 2023 Insight

*Business clients are moving more towards developing long-term relationships and previous experience in choosing their law firms. For lawyers this means providing a great service will lead to repeat business and recommendations.*

*Improving your digital marketing channels should also be a key consideration for improvement as the ease of internet search and comparing reviews often lead to their decisions to contact your firm.*

*Lawyers wanting to attract Potential and Personal clients must build their network and foster positive and memorable experiences with their current clients to promote recommendations.*

*Reviewing your digital marketing presence is also vital, ensuring your firm is using online marketing tools to promote your firm.*

# Key factors influencing your clients in choosing a lawyer



Based on the data above, it is evident that your clients prioritise expertise and clear communication when selecting a lawyer. They value lawyers who not only provide legal advice but also explain complex legal concepts in a manner that is easily understood by non-legal professionals.

Additionally, cost transparency, including clear indications of fees and possible outcomes, is crucial for clients to make informed decisions and effectively manage their legal expenses. Cost only becomes an issue at later stages because it was not clearly explained from the outset.

Lawyers who can meet these expectations are more likely to attract and retain clients. By emphasising their expertise, adopting clear communication practices, providing transparent cost estimates, and explaining potential outcomes, lawyers can enhance their chances of securing and maintaining successful client relationships.

## 2023 Insight

***Ensure all your communications with your clients are clear and in plain English. Be clear and concise with fees, timelines and potential outcomes and update clients if any changes occur.***

*Hey, Lawyers*

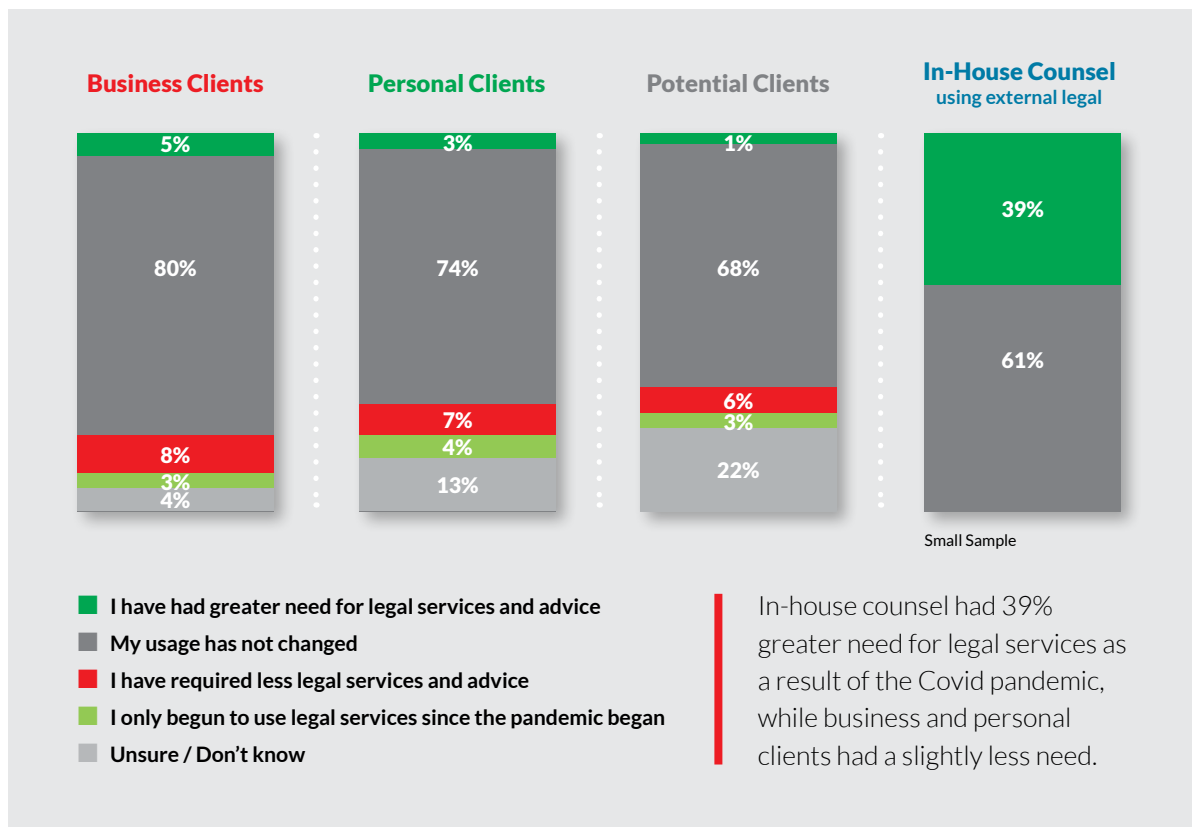
What are your clients saying about you?

# Innovation in legal services client engagement

Part 4-of-6



# How the Covid Pandemic changed the level of legal services required



***'Ensuring Covid-related contract issues for essential workers in our business are properly implemented increased our need for legal services' – Business Client***

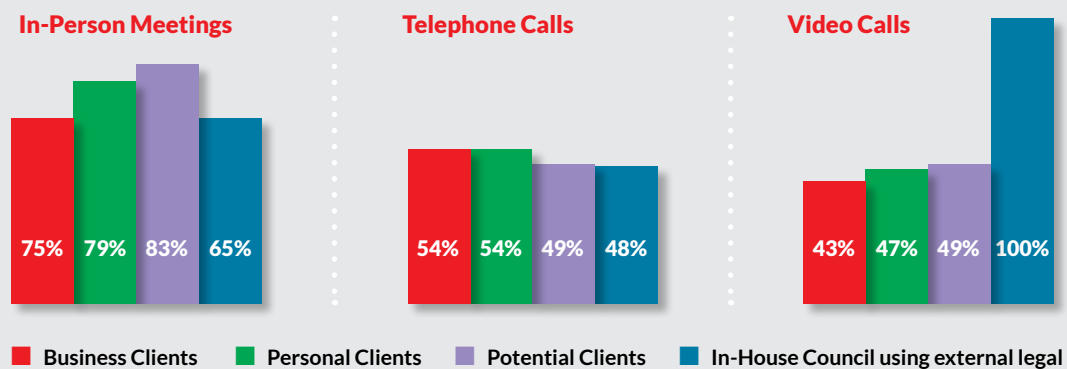
## 2023 Insight

***The Covid pandemic and the subsequent lockdowns had a large impact on the way businesses could operate and people's personal lives. Business had to adapt to contactless operations and personal lives were more isolated.***

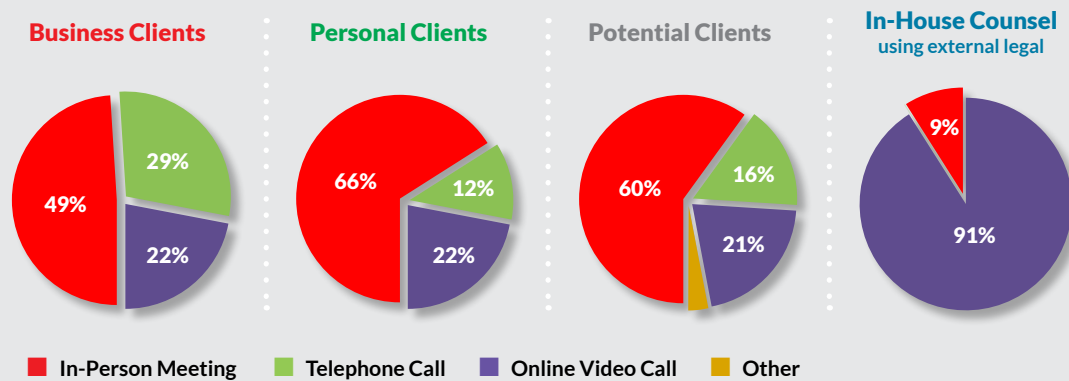
***Lawyers had to adapt to this 'new normal' way of working, looking at new technologies and opportunities such as online meetings, online document sharing etc., to ensure they could still serve their client's needs.***

# Preferred methods of contact / engagement

What engagement channels are you open to? *Multi-response.*



What is your preferred engagement channel? *Single-response.*



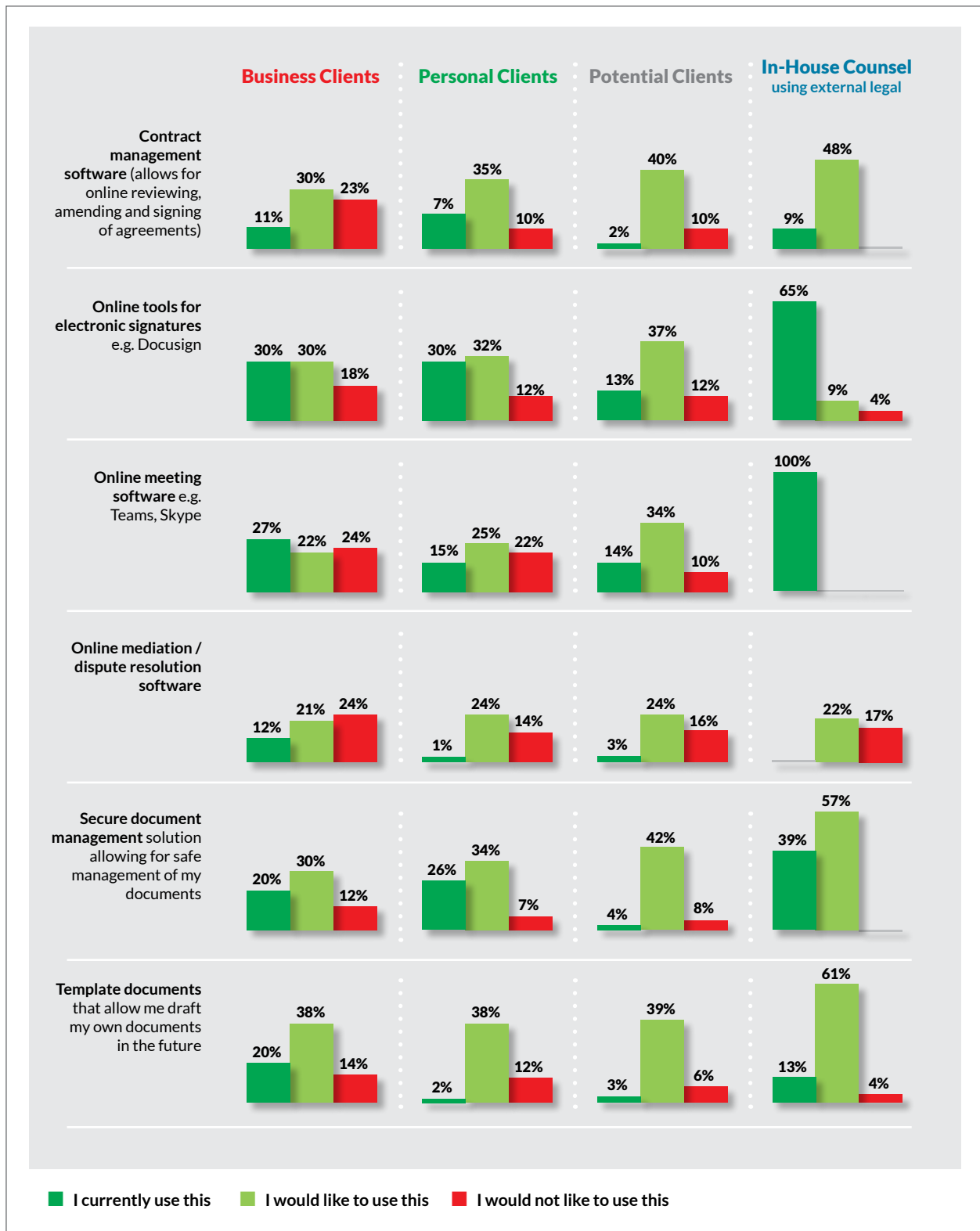
Approximately half of all groups are open to using online video calls and phone calls. But the majority still prefer meeting in person with the exception of In-house counsel who prefer online video calls – is this a result of technology such as ‘Teams’ being used during Covid?

## 2023 insight

*In person meetings remain the most popular engagement channel, though In-house counsel using external lawyers have a stronger preference for online video calls. This shows that lawyers need to adapt their method of engagement dependent on the type of client and their preferred ways of communication.*



# Technology used when engaging with your lawyer





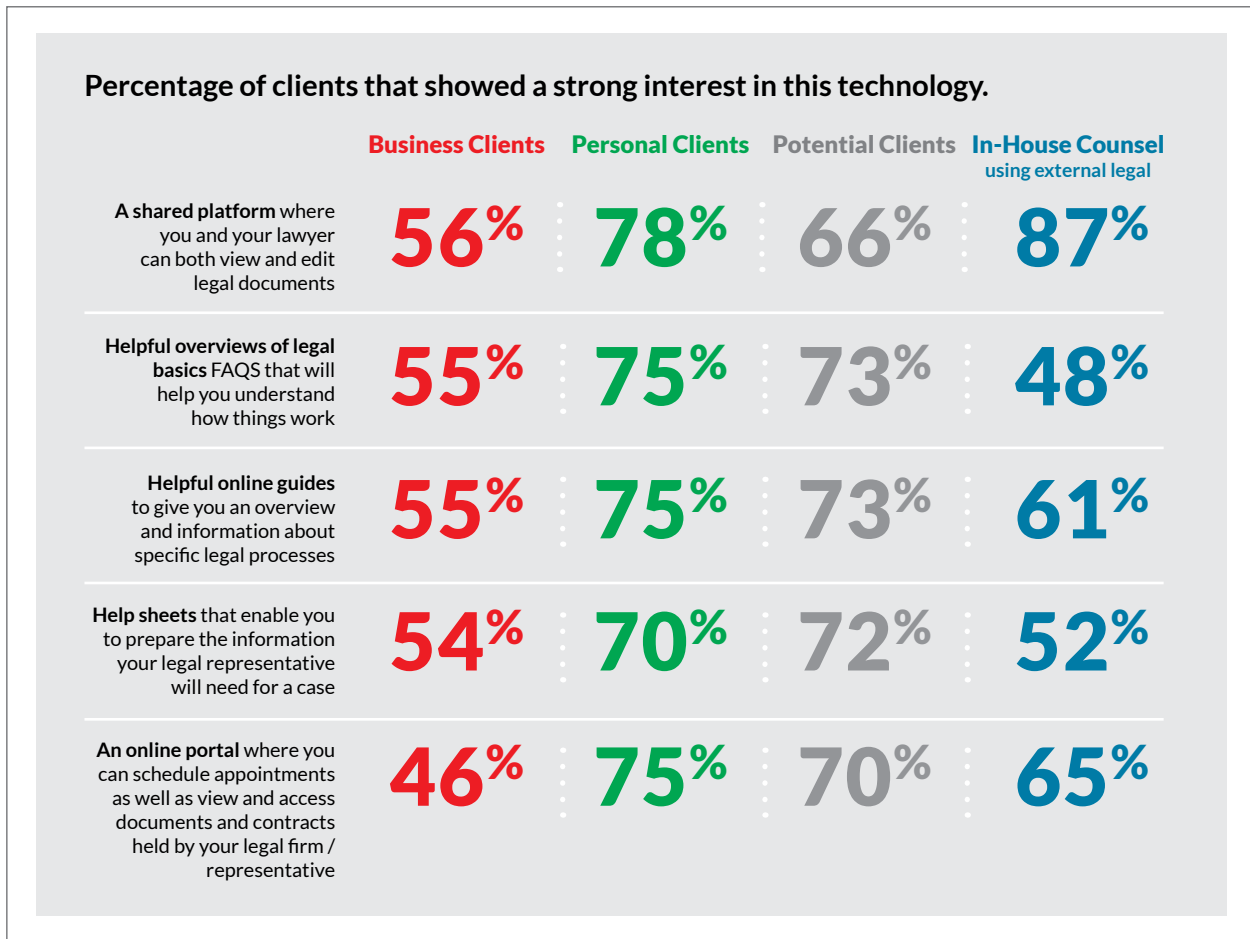
- **Business clients** show strong interest in many online tools but some smaller businesses may be less open to using online technology
- **In-house counsel** clients show a high usage and consideration of a range of these online tools
- **Personal** and **potential clients** show openness to signing and storing documents online, though less so for online engagement tools.

In general, most clients would like to use more technology in their legal transactions. This could be because it is more convenient and takes less time doing things online than having to go into an office. So why aren't these types of technologies being offered to the clients? What are the barriers for lawyers to offer this tech driven service? The willingness to adopt technology will have increased over the Pandemic with contactless business having to be the norm but remember to include some client training on any new procedures you introduce to keep clients happy and loyal.

## 2023 Insight

***Lawyers need to have a range of online tools to satisfy their client's needs, from online meetings and electronic signatures to online document storage that allows documents to be reviewed and amended. Using these technologies should streamline your processes giving a better client experience, but remember to educate your clients to help make this an easy transition.***

# Online engagement tools



Over 2/3rd of clients have a strong interest in a shared online platform for their legal documentation, making this a must-have for law firms. Also, general guides and overviews are useful in those areas of law where cases are similar e.g. conveyancing, wills etc. It helps clients collate the data required and then the time spent with the lawyer is seen as more productive.

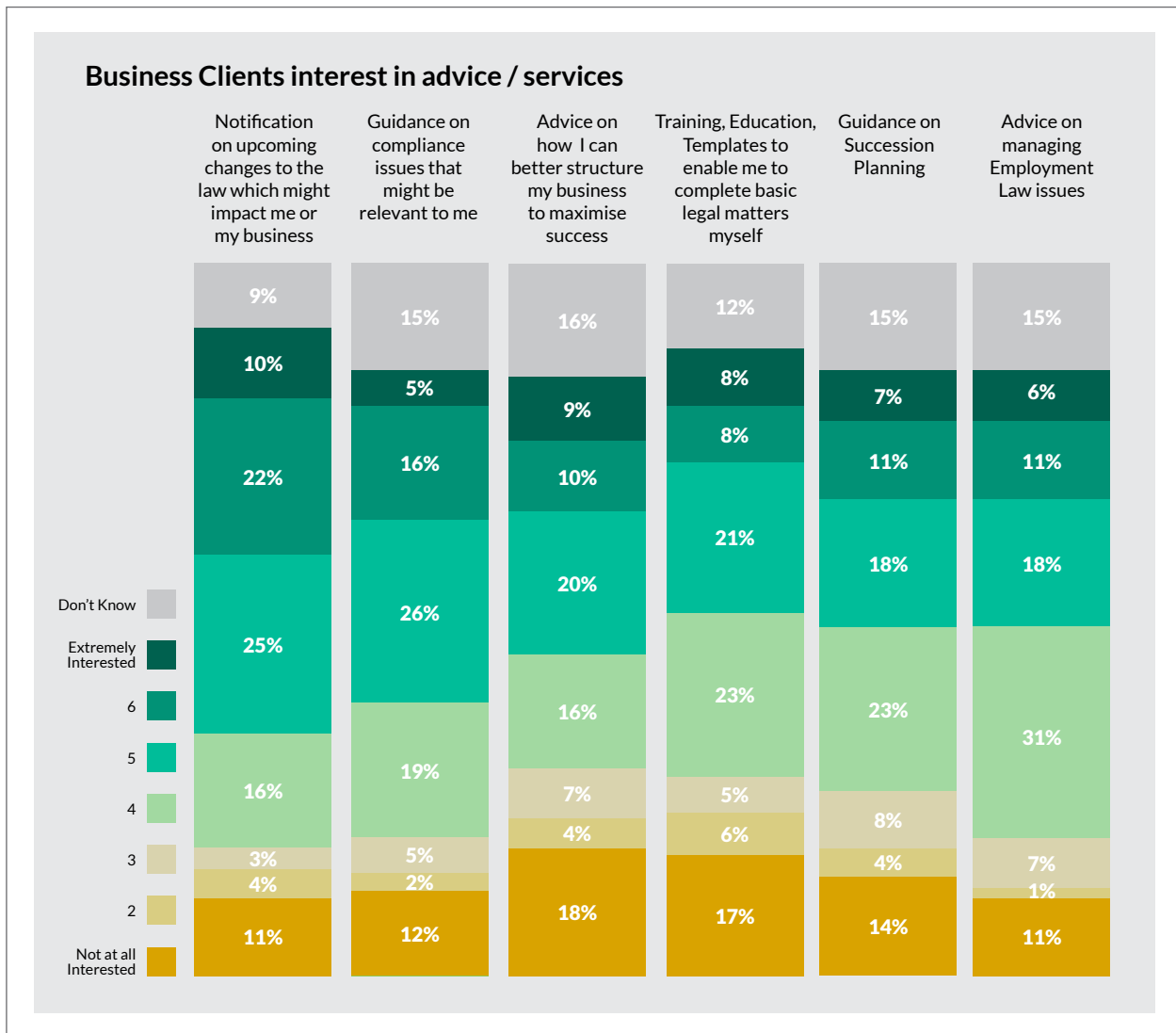
- **Business clients** are least interested in these ways to engage.
- **Personal clients** show the most interest in these ways to engage.
- **In-house counsel** are least interested in help guides but have a high interest for a shared platform.

## 2023 Insight

*In-house counsels are trained lawyers and understand the legal process so using a shared platform with them would deliver a greater customer experience.*

*Personal clients would find legal help guides and overviews useful as many situations would be the same for everyone e.g. buying a house, setting up a family trust etc. But Business and In-house counsel clients feel their issues will be unique to their business and therefore will not be covered in a general guide or overview.*

# Interest levels on receiving advice **Business Clients**

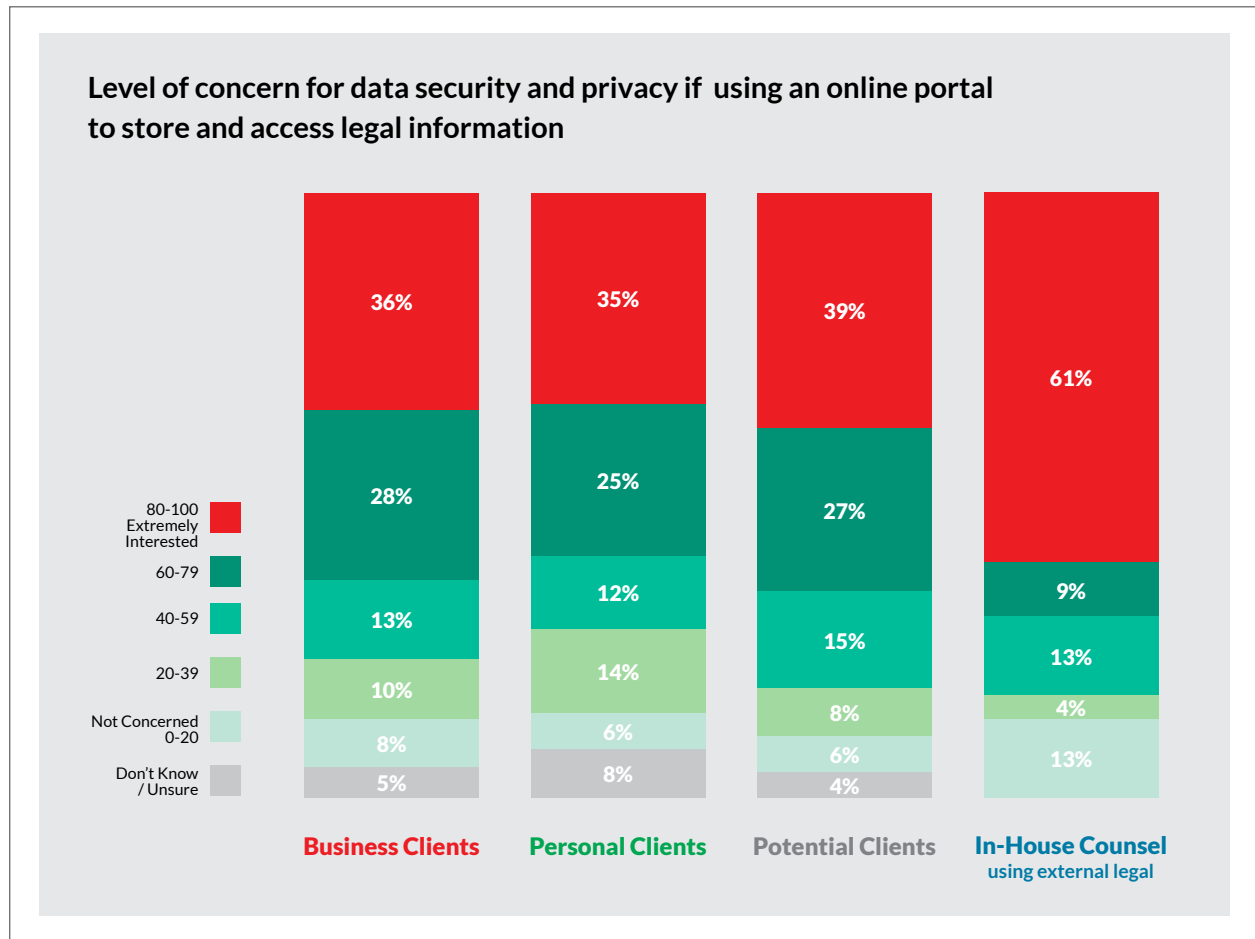


Business clients are most interested in being notified of upcoming changes to the law and compliance issues that might impact them or their business. They are least interested in advice on structuring their business and having templates to be able to complete legal matters themselves.

## 2023 Insight

**To increase confidence and provide a better customer service, lawyers could notify their business clients on any changes to the law or compliance issues that may affect them, giving advice on what they need to do, and how you can help them stay within the bounds of the law. This will create better loyalty as they know they can rely on you to give the business time to plan and make the necessary changes in a timely fashion when required.**

# Online data security and privacy



With greater use of online systems in our business and daily lives, we assume that our personal data is kept safe. It is only when there has been a data breach at a large organisation do we contemplate our privacy online. Having robust and regularly reviewed processes for your data storage is imperative no matter how large or small your firm, it is all about trust and reliability.

Surprisingly, over a third (+35%) of business and personal clients still are extremely concerned about their data security.

# 61%

## Extreme Concerns

61% of In-house counsel have extreme concerns about their data being secure and private.

## 2023 Insight

***As a lawyer if you are using online technology with your or your client's data, ensure you have robust processes in place that are regularly reviewed to maintain the security and privacy of that data.***

*Hey, Lawyers*

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# How to be Exceptional

Part 5-of-6



# Crafting your professional image in the legal market



Previous experience and recommendations are the most preferred ways to find a lawyer, therefore providing an exceptional legal service will lead to repeat business and recommendations.

Clients top perceptions remain **Knowledgeable, Professional** and **Trustworthy** which you would expect from all lawyers but it is the removing of negative perceptions (**Workaholic, Dull, Intimidating, Arrogant, Aggressive, Egotistic, Unsympathetic**) that will move your service from good to exceptional, making you stand out from other lawyers.

## **2023 Insight**

*Review your engagement values to remove the negative attributes and make the client feel like a part of your legal family.*



# Servicing, Pricing and the Pandemic key insights



## Servicing

Client communication and engagement are the most important aspects for the solid foundation of providing a great legal service. This includes:

- Engaging in a way that suits the client – time, place, online, etc., (e.g. in-house counsel prefer video conferencing as well as many in the business and corporate sector but personal clients still prefer to meet face-to-face).
- Listening to their needs and making clear what they can expect in terms of the case, fees and regularity of updates.



## Pricing

The majority felt pricing was reasonable or about right, but in these inflationary times, a greater number of business and personal clients feel pricing was unreasonable. This had a knock-on effect, lowering satisfaction levels when it came to explaining the charging system upfront or making the cost of the work clear. There is room for improvement to clearly explain pricing upfront to set expectations.

Clients want their lawyer to be as conscious about costs as they are, especially in these high inflationary times. Keeping clients updated on costs as you progress their case is one way to maintain cost expectations.



## The Pandemic

The Covid pandemic and the subsequent lockdowns had a large impact on the way businesses could operate and people's personal lives. Businesses had to adapt to contactless operations and personal lives were more isolated.

Lawyers had to adapt to this 'new normal' way of working, looking at new technologies, etc., and opportunities such as online meetings, online document sharing, etc., to ensure they could still serve their client's needs.

# Key insights for each client type

## Business Clients

Business clients are a diverse group, ranging from SMEs to corporates, so it is important to get to know their individual needs. They want a lawyer that gets to know their business and is proactive with changes in legislation or compliance issues that may be relevant to them or their business.

## Personal Clients

Personal clients tend to have a higher need for engagement and guidance, most likely due to engaging with legal services less frequently. Be sure to establish both expectations and pricing clearly from the beginning.

## Potential Clients

Potential clients are more likely to rely on recommendations to find a lawyer (73%). This indicates that it is important to consider how you maintain engagement and trust with your existing clients to receive referrals, as well as the activities you engage in to build trust with new and infrequent clients.

## Inhouse Counsel

In-house counsel dealing with external legal have a professional rapport with their legal representative with strong satisfaction for engagement measures. There is room for improvement around the convenience and ease of making an appointment, the setting of expectations upfront and being kept up to date in a timely manner.



## Going forward, what does the future hold?

In-person meetings remain the most popular way to engage with lawyers but online tools are becoming more accepted. This has a lot to do with the Covid pandemic and having to find smart contactless ways to work. Online meeting software is now a useful option, saving on travel time but still being able to see who you are talking to.

Other online tools, such as sharing documents, electronic signatures, etc., are also becoming more common place especially with business and corporate clients as they save time and are more convenient in the business world.

With this rise in online technology, there are high levels of concern for data security and privacy. With the sensitive nature of data being handled and the issue of lawyer-client privilege, it is important that your client's data and communications are protected and systems continuously upgraded against any threats to maintain client confidence.

Generative AI and large language models have the potential to transform the practice of law, but if they are to be fully embraced, they must be accurate with reliable data to draw on.

***The future is here – are you taking advantage of the legal technologies LexisNexis has available?***

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# What can in-house counsel do better when engaging with corporate decision-makers?

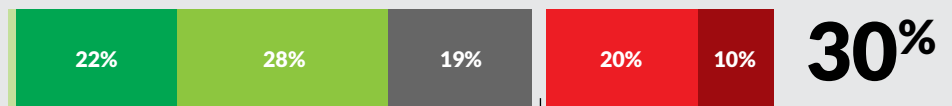
Part 6-of-6



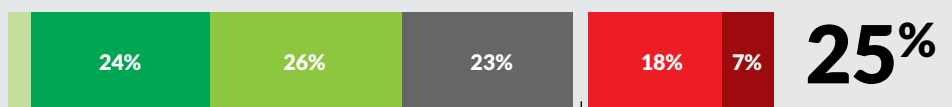
# Legal Service Level Expectations

Approximately 75% of corporate decision-makers are satisfied with how their in-house counsel listens, takes time to explain what is required and appreciates their needs and expectations. However, there is some dissatisfaction with in-house counsel not being approachable and talking down to stakeholders or using complicated terms without explanation (30%).

## They talked down to me / Used complicated terms without explaining



## They were standoffish (not very approachable, or friendly)



■ Strongly Agree 
 ■ Tend to Agree 
 ■ Neither 
 ■ Tend to Disagree 
 ■ Strongly Disagree 
 ■ NA/Can't Remember

## 2023 Insight

***In-house counsels need to be part of the business team and work with their colleagues for the benefit of the company as a whole.***

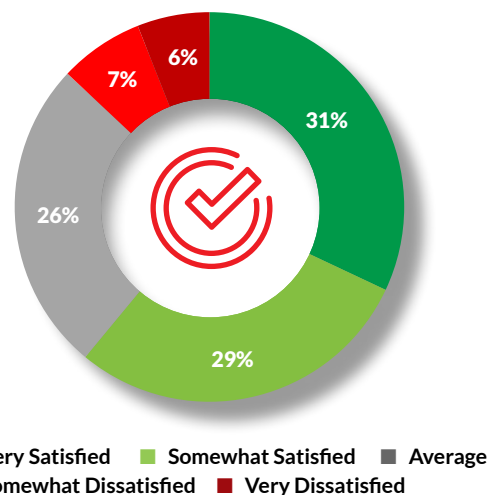
***'Listens to my needs, discusses my issues with me, explains in simple terms'***

***'Do not overcomplicate or overanalyse situations'***

## Overall Satisfaction

There is appreciation for in-house counsel's business knowledge, advice and when they are engaged in the business. Conversely when in-house counsel make situations seem complex or they do not take the time to engage and listen, this leads to dissatisfaction.

- In-house counsels are invaluable when they are knowledgeable about the business and are proactively engaged with the leadership team.
- 'Understands our business and not just the law'
- 'Engages with us in a friendly manner'
- 'Gives practical actionable advice'



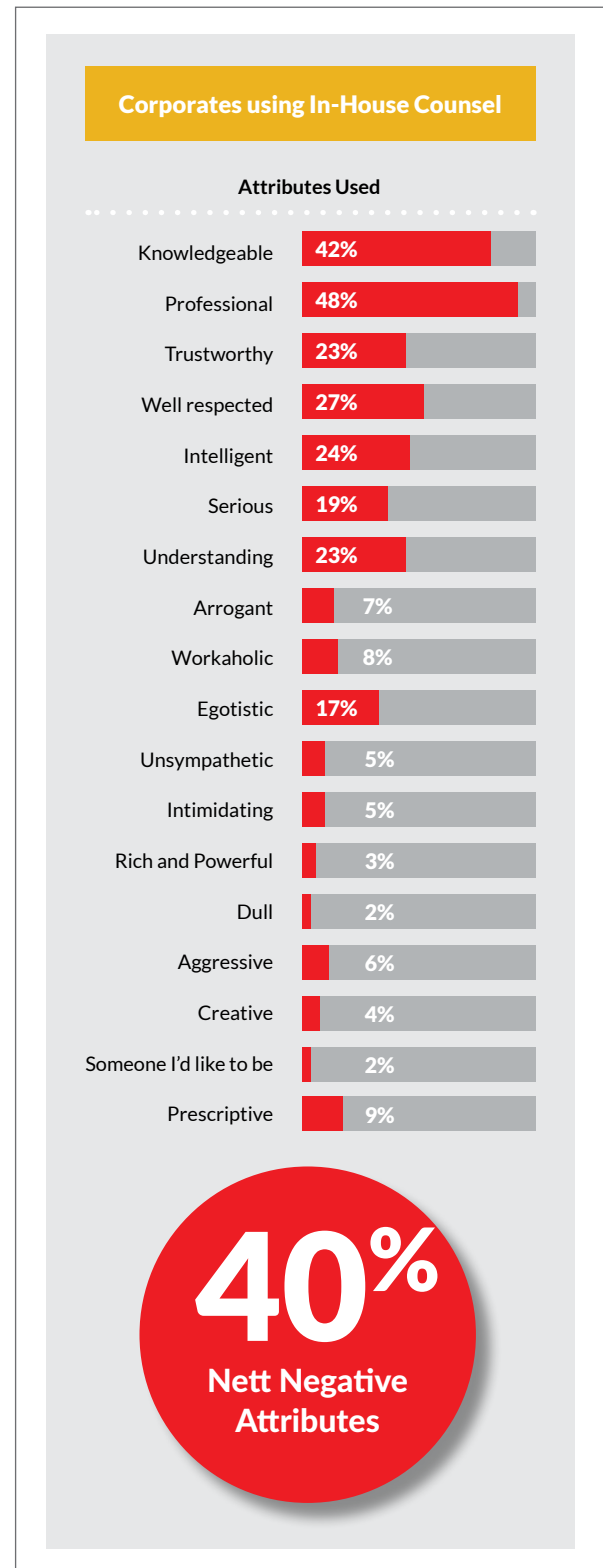
# Attributes used to describe In-House Counsel

All clients have a similar perception of lawyers and this is no different for corporate decision-makers and their in-house counsel, with attributes such as Professional, Intelligent and Knowledgeable being held widely.

But 2-in-5 corporate decision-makers have a negative perception of in-house counsel compared to 1-in-3 for business clients using external lawyers. Business clients hold legal in higher regard in terms of being trustworthy while corporate decision-makers find in-house counsel egotistical and prescriptive, and this is something in-house counsel will need to address in the future.

## 2023 Insight

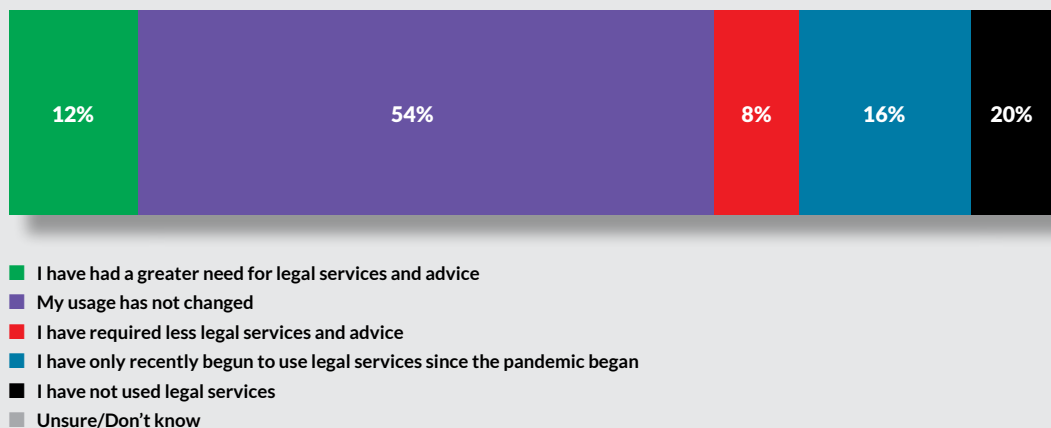
***Review your engagement values to remove the negative attributes and make your corporate decision-makers feel welcome and heard. Removing the negative perceptions will move your service from good to great making you stand out in the business for all the right reasons.***





# Innovation in legal services client engagement

How did the Covid Pandemic changed the level of legal services required?



Corporates using in-house counsel had a 12% greater need for legal services as a result of the Covid pandemic, while in-house counsel using external legal had a 39% greater need, due to the specialist nature of the advice required.

## 2023 Insight

**Reasons why the pandemic changed the need for legal service, quotes from respondents:**

- 'managing vaccine mandates'
- 'vendors getting into trouble resulting in contractual problems'
- 'ensuring Covid-related contract issues for essential workers in our business are properly implemented'

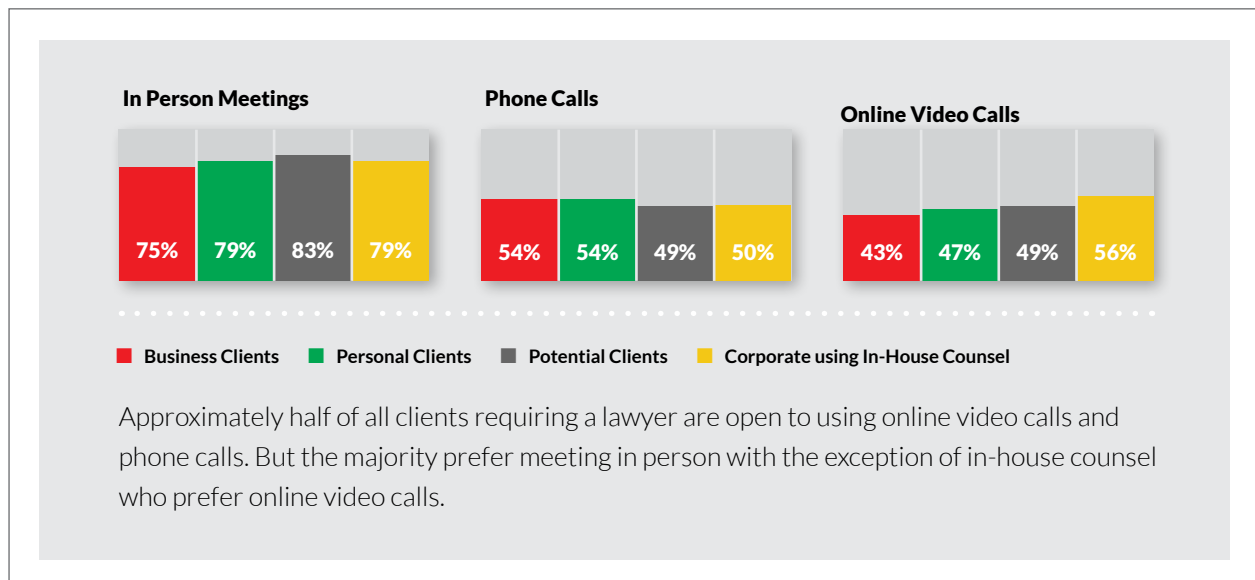
**The Covid pandemic and the subsequent lockdowns had a large impact on the way businesses could operate and people's personal lives. Businesses had to adapt to contactless operations and personal lives were more isolated.**

**In-house counsel had to adapt to this 'new normal' way of working, looking at new technologies and opportunities such as online meetings, online document sharing etc., to ensure they could still serve their business's needs.**





## Methods of Contact



### 2023 Insight

*In person meetings remain the most popular engagement channel for corporate decision-makers. This shows that in-house counsel need to be approachable and make the time to see and understand their internal clients needs.*

# Technology used by Corporates with In-House Counsel

Corporate decision-makers use and would like to use more technology in their legal transactions. This could be because it is more convenient and saves time. So why aren't these types of technologies being used more? What are the barriers to offering tech driven services? The willingness to adopt technology will have increased over the Pandemic with contactless business offerings having to be the norm but remember to include training on any new procedures you introduce to keep users happy and engaged.



## 2023 Insight

*In-house counsel need to have a range of online tools to satisfy their corporate client's needs, from online meetings and electronic signatures to online document storage that allows documents to be reviewed and amended. Using these technologies should streamline your processes giving a better corporate client experience, but remember to educate your clients to help make this an easy transition.*

## Online engagement tools

### Interest in ways to engage with lawyers

**A shared platform** where you and your lawyer can both view and edit legal documents **64%**

**Helpful overviews** of legal basics / FAQs that will help you understand how things work **67%**

**Helpful online guides** to give you an overview and information about specific legal processes **67%**

**Help sheets** that enable you to prepare the information your legal representative will need for a case **61%**

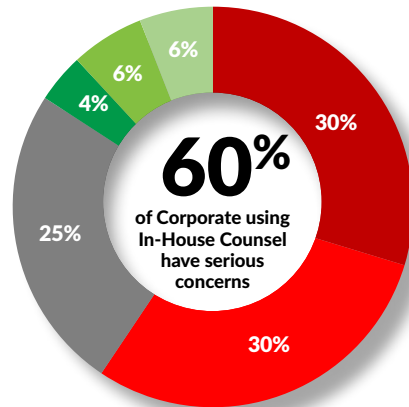
**An online portal** where you can schedule appointments as well as view and access documents and contracts held by your legal firm / representative **64%**

Corporate decision-makers would find legal help guides and overviews pertinent to their business useful. It helps them understand what is required, collate the necessary information and data, and makes the time spent with in-house counsel more productive.

### 2023 Insight

*Providing practical advice and running regular session on the types of law that are applicable to the business and any potential areas of risk would improve in-house counsel's satisfaction ratings.*

## Online data security and privacy



### Level of concern for online data and privacy

- 100-80 Extremely Concerned
- 79-60 Very Concerned
- 59-40 Quite Concerned
- 39-20 Concerned
- 20-0 Not Concerned
- Unsure

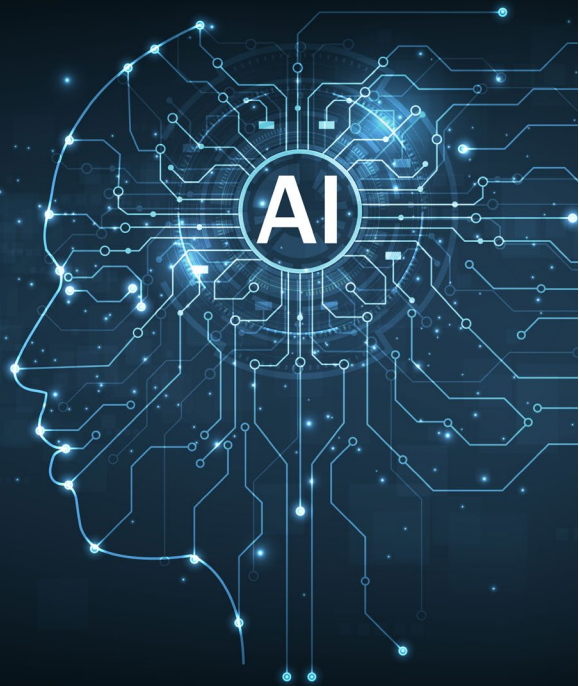
With greater use of online systems in our business and daily lives, we assume that our personal data is kept safe. It is only when there has been a data breach at a large organisation do we contemplate our privacy online. Having robust and regularly reviewed processes for your data storage is imperative no matter how large or small your firm, it is all about trust and reliability.

30% of corporate clients were extremely concerned about their data security, which is marginally better than clients using lawyers. However, in-house counsel using external legal services are twice as concerned about their data being secure and private.

### 2023 Insight

*As a business, if you are using online technology, ensure you have robust processes in place that are regularly reviewed to maintain the security and privacy of that data.*

*The future is here – are you taking advantage of the legal technologies LexisNexis has available?*



## **Going Forward**

In-person meetings remain the most popular way to engage with in-house counsel but online tools are becoming more accepted. This has a lot to do with the Covid pandemic and having to find smart contactless ways to work. Online meeting software is now a useful option, saving on travel time but still allowing you to see who you are talking to.

Other online tools, such as sharing documents, electronic signatures etc., are also becoming more common place as they save time and are more convenient in the business world.

With this rise of online technology, there are high levels of concern for data security and privacy. With the sensitive nature of data being handled it is important that your data and communications are protected and systems continuously upgraded against any threats to maintain confidence in your business.

### **How to position yourselves**

Top perceptions remain knowledgeable, professional and trustworthy which you would expect but it is the removing of negative perceptions that will move your service from good to great. Review your engagement values to remove the negative attributes to make your corporate colleagues feel welcome and comfortable in the legal space.



# Action Checklists

To stay at the forefront of legal service delivery we have put together a checklist of the items clients want to see highlighted for an enhanced legal experience.

The report was commissioned by LexisNexis New Zealand and prepared by Kantar, a member of the Research Association NZ. All the information provided in the report is confidential.

**[www.lexisnexis.co.nz](http://www.lexisnexis.co.nz)**

# Checklist 1: Legal Service Expectations

## Key learnings to help raise service levels

To stay at the forefront of legal service delivery we have put together a checklist of the items clients want to see highlighted for an enhanced legal experience. Think about the items on the checklist and how you can add these into your current processes to deliver a great customer experience every time.



### Business & Personal Clients

- ☐ Explain clearly fee and charging structure
- ☐ Provide a clear indication of the likely cost or the fixed fee for the work
- ☐ Explain how regularly you will be sending updates
- ☐ Set response expectations by explaining the timeframe for responding to queries by email or phone
- ☐ Send a Letter of Engagement and ensure you get a confirmation/agreement reply

### In-house Counsel Clients

- ☐ Ease of making an appointment - online, by phone?
- ☐ Are appointment time/wait times convenient?
- ☐ Explain clearly your fee structure
- ☐ Provide a clear indication of the likely cost or the fixed fee for the work
- ☐ Explain how regularly you will be sending updates

## Checklist 2: Perceptions of Legal Professionals

### Key learnings on how clients see you...

To maintain and raise the perception of your legal service we have put together a checklist that clients desire for an enhanced legal experience. Think about the items on the checklist and how you can add these into your current process to ensure a great customer experience every time.



- ☐ Review your firm's website and all public facing materials and match the tone and manner to your potential/current clients.
- ☐ Review what attributes are important to your firm, promote and demonstrate them in your marketing and BAU communications (e.g trustworthy, knowledgeable).
- ☐ Assess your firms value proposition, do you aspire to be seen as progressive/forward thinking or traditional/conventional - there is no right or wrong answer, it is what you want your clients to perceive your firm and what it means to them.
- ☐ Set aside a day each month to network and engage with your local community to breakdown perceptions.
- ☐ Create a client engagement plan that outlines each client's communication frequency and type preferences.
- ☐ Tailor the communication style to the types and style of your clients to be more relatable and gain trust.
- ☐ Have a clear communication checklist to ensure that each communication to client provides transparency on their matter.
- ☐ Use Plain English in documents or provide a glossary of legal terms translated into Plain English in each piece of communication.



## Checklist 3: Decisions and considerations in engaging legal services

### Key learnings for clients to find and use your legal services

In order to position yourself as the preferred lawyer, we have compiled a checklist based on your client feedback regarding the key factors they consider when selecting legal representation.

Review the checklist and explore ways to incorporate them into your current process, ensuring that you consistently emerge as the top choice for your clients.



- ☐ Build your network of clients and trusted advisors such as accountants and banks, and if possible engage with your local community through local sponsorships and engagement opportunities. Local schools and community Facebook pages are good places to start.
- ☐ At initial appointment ensure you have clearly explained the possible outcomes, fees and charging system and frequency of communication preferences.
- ☐ Always try to use plain English in documents and conversations where possible and provide a glossary of legal terms.
- ☐ For your current clients, reviewing your continued communication plans, do you have one tailored for each client (e.g remembering birthdays, anniversary and sharing relevant news and industry updates)
- ☐ Review your digital marketing plans and budget, ensure you have expertise in assisting with your SEO (search engine optimisation) and SEM (search engine marketing) plan to ensure your firm is being displayed to your digital audience.
- ☐ Build your firm's social media profile and also your individual LinkedIn profiles, and have a marketing plan that promotes your firm and lawyers.

# **Checklist 4: Innovation in legal services client engagement**

## **Key learnings on using technology to engage with your clients.**

To use appropriate technology to engage and interact with your clients, we have put together a checklist of the technology and issues clients would like to see. Think about the items on the checklist and how you can add these innovations into your current processes to ensure you can deliver better customer engagement every time.



- ☐ Look at your processes and put in place a contingency plan for working from home and contactless support or service.
- ☐ In order to position yourself as the preferred lawyer, have multiple ways of engaging with clients and understand their preferred ways of communication.
- ☐ Look at the new technologies available and develop processes to incorporate into your work routine:
  - Contract management systems
  - Secure online document storage
  - Online tools for electronic signature
  - Online meeting software
- ☐ Some education may be required internally and to your clients when adopting new methods of work, so remember to add this into your business process to make it an easy transition for all.
- ☐ Analyse your client types and their needs and implement those engagement methods that would improve their overall level of client satisfaction. Look at legal guides for personal services only.
- ☐ Notify business clients on any changes to the law or compliance issues that may affect them or their business to increase their confidence in you and provide a better customer service.
- ☐ If you are using online technology with your firms data, or your client's data, ensure you have robust processes in place that are regularly reviewed to maintain the security and privacy of that data.

## Checklist 6: What can in-house counsel do better when engaging with corporate decision-makers?

### Key learnings for in-house counsel

To continually improve the in-house legal service to your corporate decision-makers, we have put together a checklist. Think about the items on the checklist and how you can add these into your current process to ensure you deliver a great customer service every time.



- ☐ Make sure you understand the business and how the law relates to it.
- ☐ Be friendly and approachable, get to know the corporate decision-makers.
- ☐ Actively engage with your corporate decision-makers providing legal guides and practical sessions on the types of law applicable to the business and their roles.
- ☐ Explain the legal situation in business language not legalese.
- ☐ Look at the new technologies available and develop processes to incorporate into your ways of work:
  - Contract management systems
  - Secure online document storage
  - Online tools for electronic signature
  - Online meeting software
- ☐ Some education may be required when adopting new methods of work, so remember to add this into your business process to make it an easy transition for all.
- ☐ If you are using online technology, ensure you have robust processes in place that are regularly reviewed to maintain the security and privacy of that data.



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# This is a series of discerning research summary insights.

Are you taking advantage of new technological developments to allow you to work smarter and invest more of your time with your clients to exceed their expectations? LexisNexis has developed many legal tools that can help you streamline your service, giving you back the time to enhance your client relationships.

TO TAKE ADVANTAGE OF THESE LEGAL TOOLS AND SERVICES OR DISCUSS THE FINDINGS IN THIS RESEARCH, PLEASE CONTACT YOUR RELATIONSHIP MANAGER OR EMAIL US AT [\*\*CUSTOMERSUPPORT@LEXISNEXIS.CO.NZ\*\*](mailto:CUSTOMERSUPPORT@LEXISNEXIS.CO.NZ)

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