

What are your clients saying about you?



Innovation in legal services and client engagement

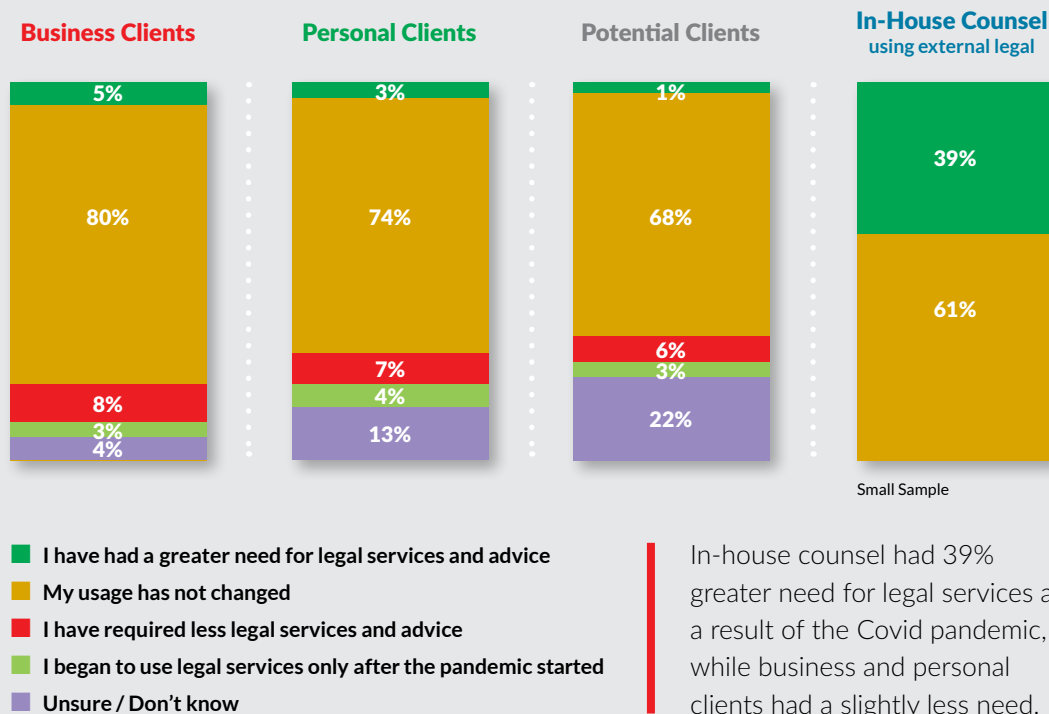
Part 4-of-6

In 2016, an in-depth research was commissioned to provide an overview of the current perceptions and delivery of legal services in New Zealand. We re-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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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.

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

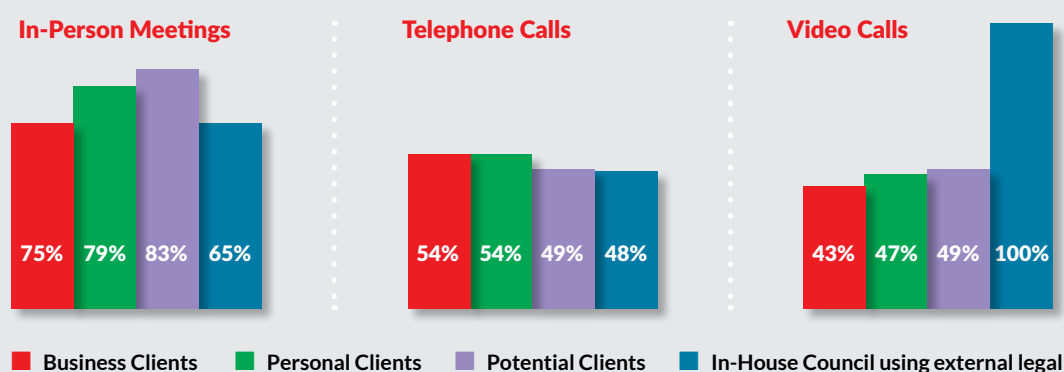
2023 Insight

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

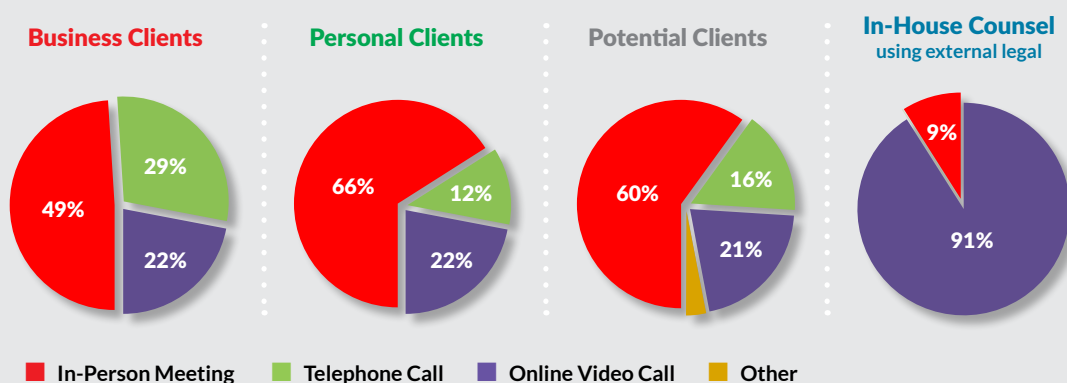
Lawyers had to adapt to the 'new normal' way of working, looking at new technologies and opportunities such as online meetings, online document sharing, etc., to ensure they could still serve their client's needs.

Preferred methods of contact / engagement

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



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

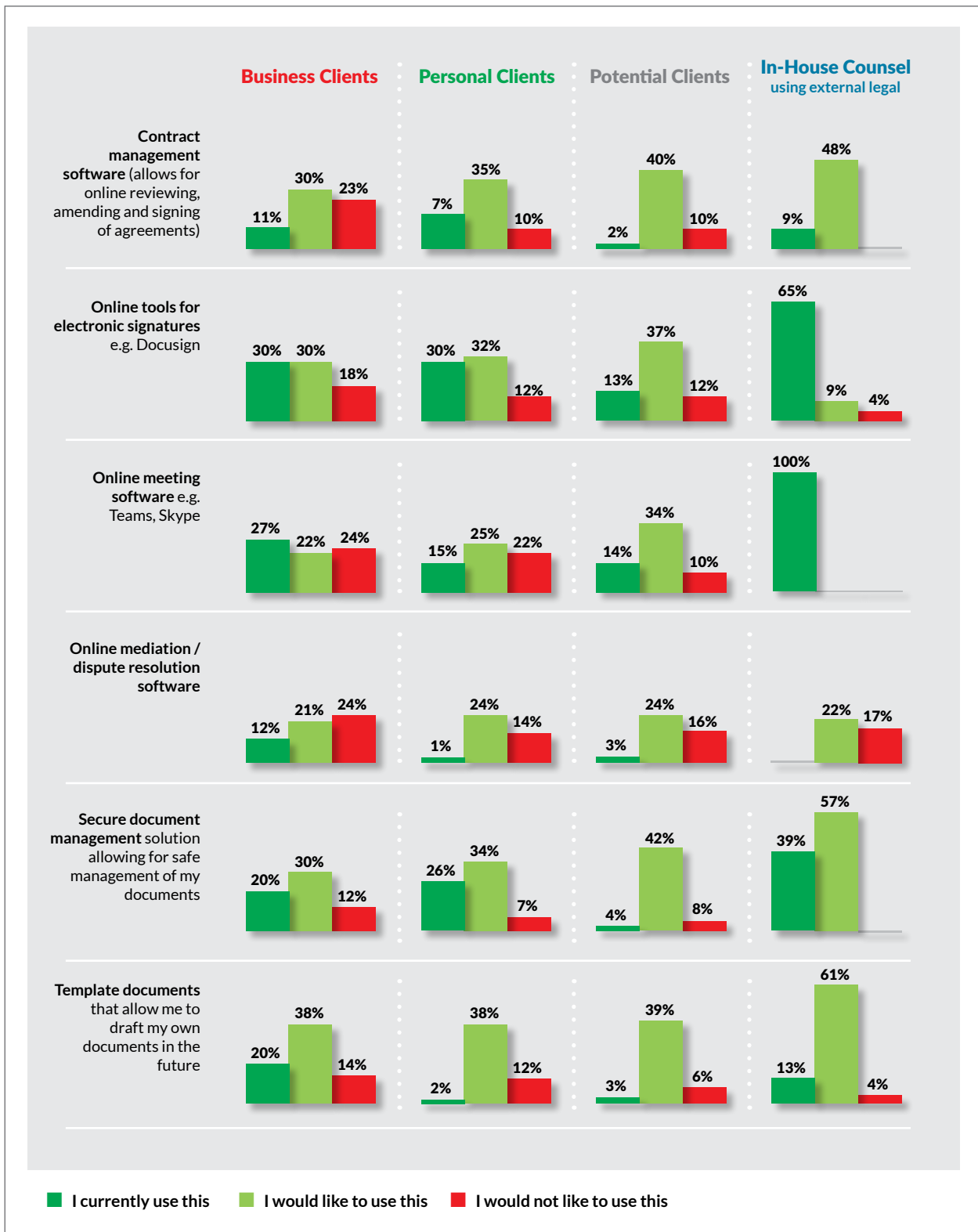


Approximately half of all groups are open to using online video calls and phone calls. But the majority still prefer meeting in person with the exception of In-house counsel who prefer online video calls – is this a result of technology such as 'Teams' being used during Covid?

2023 insight

In-person meetings remain the most popular engagement channel, although 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 depending 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 has increased over the pandemic, as contactless business became the norm. However, remember to include some client training on any new procedures you introduce to keep clients happy and loyal.

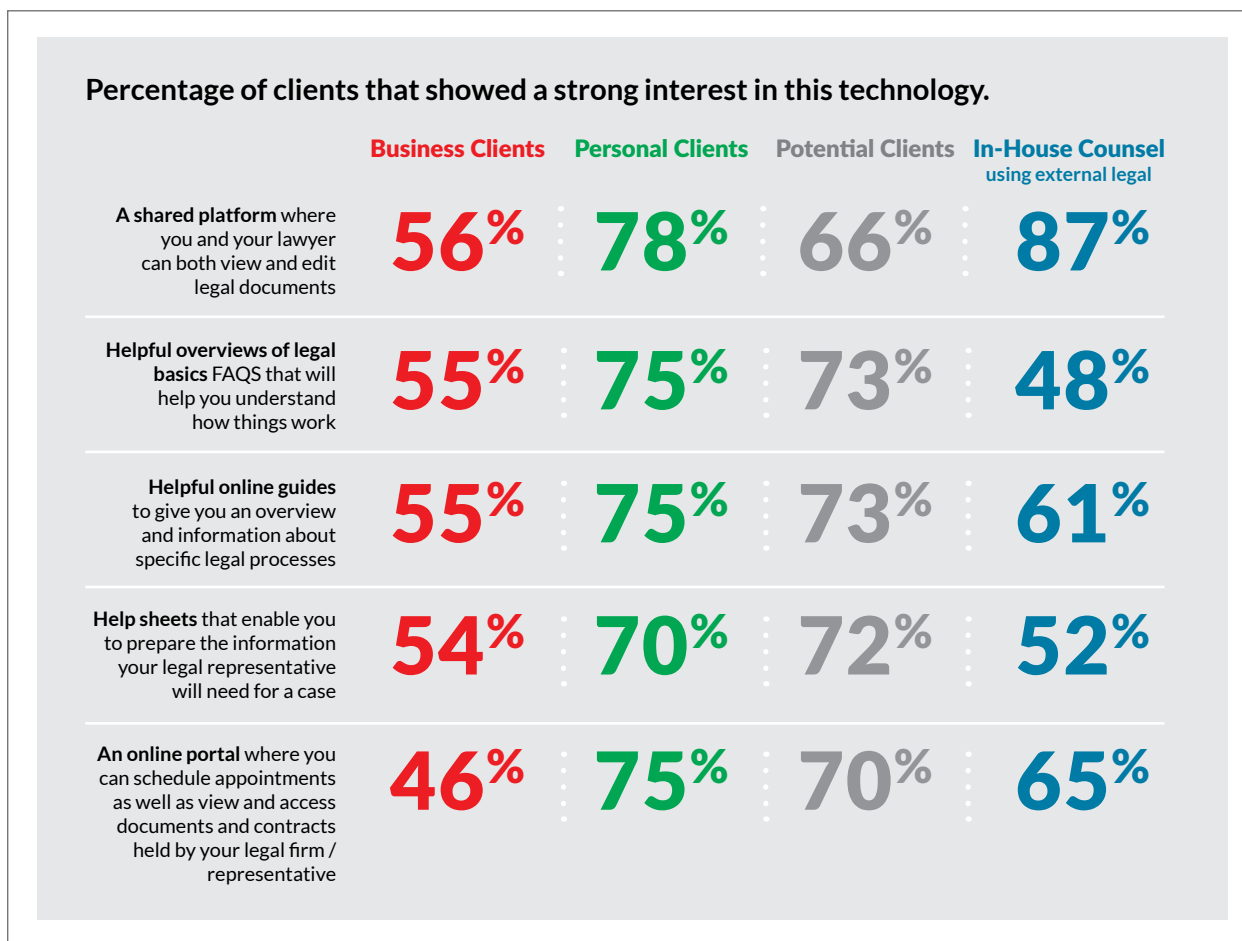
2023 Insight

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.

**“ Over 2/3rd of clients
have a strong interest
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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 in a shared platform.

2023 Insight

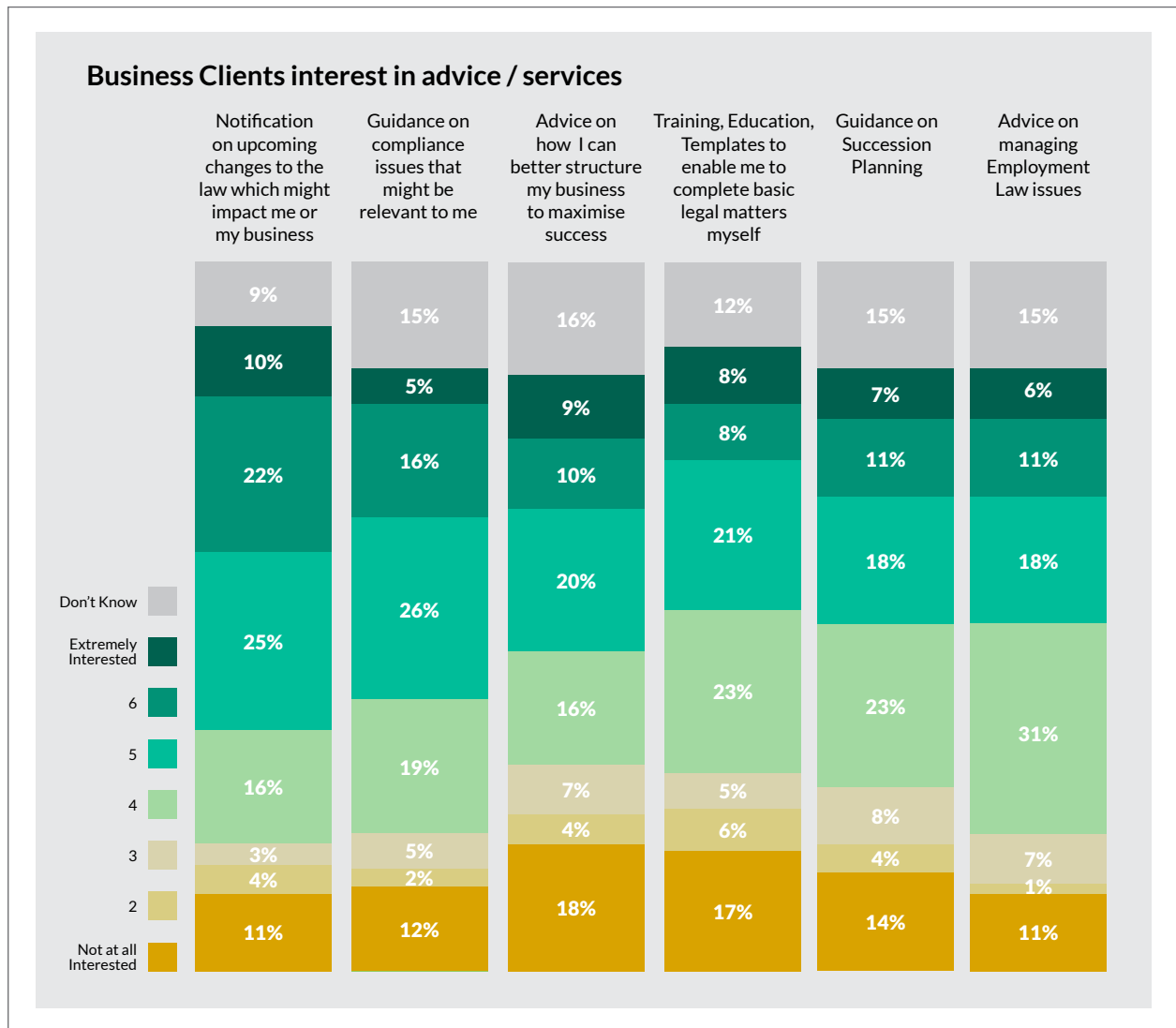
In-house counsels are trained lawyers and understand the legal process so using a shared platform with them would deliver a greater customer experience.

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.



“ Business clients are most interested in being notified of upcoming changes to the law and compliance issues that might impact them or their business. ”

Interest levels on receiving advice **Business Clients**

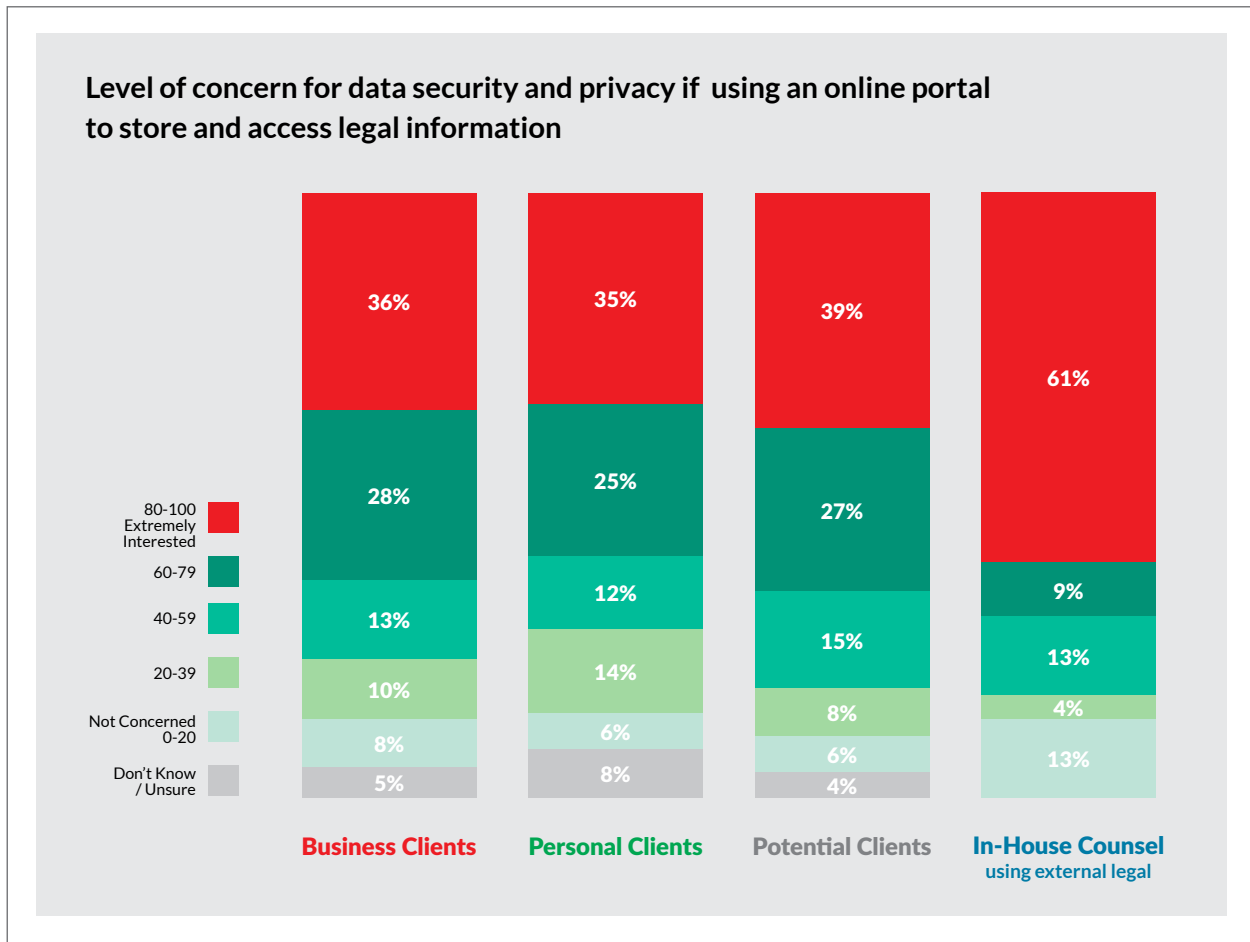


Business clients are most interested in being notified of upcoming changes to the law and compliance issues that might impact them or their business. They are least interested in advice on structuring their business and having templates to be able to complete legal matters themselves.

2023 Insight

To increase confidence and provide 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 is; 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.

Action Checklist

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 of any changes to the law or compliance issues that may affect them or their business to increase their confidence in you and provide better customer service.
- ☐ If you are using online technology with your firm's 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.

This is the fourth in 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 and services 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**

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