

Six technology tools for improving client communication



Technology is becoming an ever greater part of our lives, both personally and professionally. On a daily basis most of us use a cellphone or smartphone, a desktop computer and the Internet. Many of us will have an iPad or other tablet device and be posting updates on Facebook, Twitter or other social media tools.

Clients expect their lawyers to be technology literate – and there are always new and improved ways for communicating with clients. Here are some newer tools that you can consider using to better serve and communicate with your clients.

1 **Help clients find your office**
How often do you find yourself giving new clients directions to your office? Google Maps offers a great tool for creating a map that will show clients the location of your office. Go to maps.google.com

and type your office address into the search box. Click on the link icon (look for an icon with three chain links at the top right corner of your screen). This will open a pop-up that will give you a URL link you can use to access that same map. Send that link to new clients via email and they can see the map. The pop-up also gives you the HTML code you can use to include the map on your website. Take it a step further by creating customized maps to show clients directions to other places that might be helpful for them (for example, the local court house).

2 **Electronic intake forms**
In many areas of practice, collecting background information is the main purpose of an initial meeting with a client. Wouldn't this be easier if the client came to your office with a standard intake form already completed?

Adobe Acrobat (the Standard and Pro versions) makes this possible by giving you the ability to create an electronic PDF client intake form which you can email to your client. The client can print it to fill out a paper version or better still, can complete it onscreen and send it back to you electronically. The client just needs the free Adobe reader software.

And don't limit yourself to the intake process – consider converting other paper forms you have in your office. Acrobat has a form conversion tool that does a fantastic job of converting paper forms into electronic ones.

3 **Virtual meetings**
Virtual meeting tools let you collaborate across the web in ways that are just as effective as face-to-face meetings, while helping you significantly reduce time and travel costs.

These tools let you show the contents of your computer screen to multiple people via the Internet. You can create a document much more quickly when everyone can simultaneously view and comment on the draft as it evolves. In a single phone call you can draft and finalize a document that normally might take many emails and redrafts over days or weeks to create. These tools are easy to use and you can set up a virtual meeting on an *ad hoc* basis in the middle of a conference call in a matter of minutes.

GoToMeeting (www.gotomeeting.com), WebEx (www.webex.com) and Acrobat Connect (www.adobe.com/products/adobeconnect.html) are the most widely used virtual meeting tools. Pricing for the basic versions of these products is around \$50 per month. Some of them have trial or limited-use versions that you can use for free. If you avoid just one in-person meeting a month, you are more than paying for them. I have GoToMeeting installed on my laptop, and it allows me to host a virtual meeting from anywhere I have an Internet connection.

4 Free long distance

Voice-over-IP or “VoIP” phone systems can save on long distance charges, but they are expensive to buy and set up. However, if you have a high-speed Internet connection and your computer has a soundcard and microphone, you can try VoIP for free with Skype (www.skype.com) or Google Talk (www.google.com/talk). You can use these tools to communicate with audio and video over the Internet. While not suitable for every area of practice (and you will on occasion experience poor voice or video quality and dropped calls), some lawyers are using Skype or Google Talk to avoid long-distance charges – both improving the bottom line for their office and making clients happy about avoiding long-distance charges for calls to their lawyer. While some social media tools offer

similar functionality, it is probably safer not to use them for the sake of protecting client confidentiality.

5 Find time for a meeting

Trying to schedule a meeting with multiple people via email is inefficient and annoying – few things are better at filling your inbox with totally unnecessary messages. Next time you need to find the best time slot for a meeting, consider using online tools such as GatherGrid (www.gathergrid.com), WhenIsGood (www.whenisgood.net) or Doodle (www.doodle.com).

These tools vary slightly in how they present the options for the timing of a meeting (i.e., giving you full days of available time vs. offering specific time options), but they all work in more or less the same way. Go to one of these sites and create a meeting event. Then indicate potential times and dates for the meeting and provide the email address of each person who needs to come. Finally, initiate an email that goes out with a link that will give all invitees a calendar showing them the possibilities. Once invitees indicate whether they are available or not, the meeting organizer can go to the calendar to easily see the best time for the meeting. Some of these tools also let you send a meeting invitation that will automatically put an entry into an Outlook or other electronic calendar.

Use one of these tools next time you need to schedule a meeting: your client will really appreciate how quickly and easily you can tie down the date and time for that meeting.

6 I'm thinking of you

Marketing experts tell us we need to do things to stay top of mind with clients. The free Google Alerts

service can help you do this. It allows you to monitor the web for interesting new content and it will send you an email listing of relevant Google results (news, website content, etc.) based on your choice of query or topic.

Some handy uses of Google Alerts include:

- being notified when your name or your firm name appears in the news or on the web;
- being notified when your client's name appears in the news or on the web;
- monitoring a developing news story; and
- keeping current on a competitor or industry.

To create an alert, go to the Google Alerts page (www.google.com/alerts) and enter a text string that contains the name of the person or topic that you want to monitor (for example, your name, your firm name, a client's name or industry). Google Alerts will send you an email alert listing Google news or web search results based on the terms that you specified. You can configure it to deliver the alerts to you instantly, daily or weekly. On the news side, it searches several thousand news sources that the Google News page indexes. On the web search side, it searches all the web pages that the Google search engine indexes.

When you get an alert about something that would interest one of your clients, take a minute to send them a quick email with a link to the news item or webpage.

As the other articles in this issue highlight, regular communication with your clients is a cornerstone of a solid lawyer-client relationship. Consider how you can use the tools listed above to better serve and communicate with your clients. ■

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