



## Tech for law firms in 2021 – it's now about the personal touch



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Dave Seager explains why embracing technology in 2021 goes far beyond recognising the Solicitors Regulation Authority's focus on tech – it can enhance your client relationships to a very real extent

As a solicitor or law firm manager, it must be hard to ignore the pressure to further embrace technology in 2021.

Of course, most professional customer-facing advice businesses have had to utilise technology far more over the last 18 months, as the pandemic made physical delivery of services and advice impossible.

The fact that the Solicitors Regulation Authority (SRA) has 'technology and innovation' central to its three-year plan (2020-23) and has recently commissioned an Oxford University study in the use of technology in the legal sector, alongside the Law Society's recent [report on lawtech principles](#), means law firms have to take it seriously as 'the' issue of 2021.

As we return to a cautious normality, law firms will find a happy medium when it comes to combining face to face and virtual engagement when giving advice.

Advice of a detailed or delicate nature has always been handled in person – and I doubt this will change – whilst less sensitive, more process-driven legal work, for example conveyancing, may utilise technology far more.

However, embracing technology in 2021 and beyond goes far deeper.

I feel that solicitor businesses are several years behind financial services, particularly when it comes to the fullest use of customer relationship management (CRM) systems, which, in my opinion, are the most effective way to build client loyalty.

In financial services five years ago, there was quite the panic around the expression 'robo-advice' and whether technology might edge out face-to-face advice.

This has not proved to be the case; in fact, financial planners have harnessed technology to deliver more basic or repeat advice, for example, relating to ISAs and investment top-ups, to allow them more time with more 'valuable' clients, who may need advice delivered in person.

With the SRA focused on how best to regulate the use of technology and the Law Society suggesting lawtech principles that are over-arched by the theme of client care, now is the time for the sector to catch up and realise the benefits.

It will be about finding a comfort zone between technology, online communication, and face-to-face engagement.

Certainly, the financial services sector, although it took some firms longer than others, has fully embraced the functionality and benefits their back office and CRM systems have brought to their business.

Being able to house and link client details and data built up over time to advice given and previous services clients have purchased is essential, but it's the capability to personalise the customer experience and journey that is the real benefit – and one that I sense law firms are yet to truly embrace.

The advantage that the financial planner has over the solicitor is the financial plan, which assures them of an ongoing relationship with their clients. This is not always so obvious for the lawyer, of course.

However, now that the SRA's Code of Conduct for Firms expects systems to be adopted at firm level, it's a perfect time to use CRM systems to highlight and refer clients internally, either at the time or down the line.

There is perhaps some concern that an increased use of technology might depersonalise the relationship between firm and customer.

However, using your CRM proactively can actually enhance the relationship. Using it to remember a customer's birthday, for example, is an easy way to keep in contact, and it is little touches like this that turn a customer into a client.

But it will be harnessing your CRM to deliver ongoing marketing messages and introducing new service offerings or changes to existing ones; new team members; new firm accreditations; or even testimonials for your firm and its staff, that will give you a crucial competitive edge.

Any messages that are interesting, relevant and efficiently delivered to particular clients, can strengthen the relationship, and it is the quality of the information on your CRM that validates and ensures the right communications are received by the right clients.

In financial services, CRMs are often used to issue customer/client satisfaction surveys and can be combined with other questions about potential future services.

Offering clients their own portal to request information, track the progress of a service or view documents is another popular option to consider, if appropriate.

There is also considerable evidence that when researching which service provider to use, or indeed exactly what they need, consumers look to use interactive website tools.

As the SRA pointed out from its own research, whilst it may seem counter-intuitive, while consumers are researching potential firms interactive online tools that can be used without initially having to give personal information, are popular and build trust.

In a world where everyone wants an instant answer, many customer-facing businesses are using chatbots as a quick way to capture a potential customer browsing or researching.

I am only scratching the surface on this subject, but I urge you to embrace and fully utilise your CRM, strongly consider a client portal, and be imaginative with interactive tools and contact methods on your website, as now is the time to innovate.

Dave Seager is the former managing director of SIFA Professional and now a consulting adviser to the business, which provides business and marketing support to impartial independent financial advisers who work with solicitors.

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