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# The Triangle of Trust

How your processes affect your reputation

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70%

of clients' decisions are influenced by online reviews

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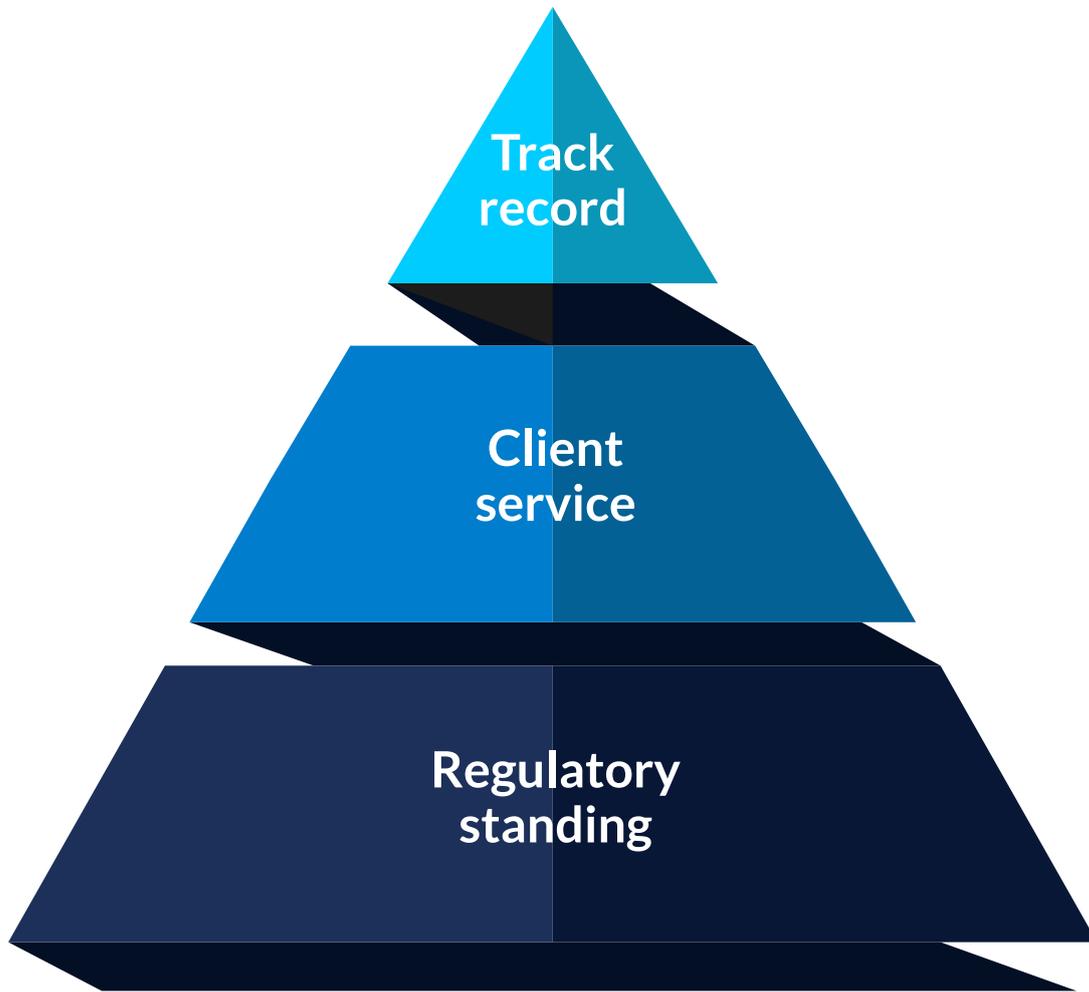
## Do you ever ask your clients why they chose you?

If you do, they would probably say, in one way or another, that your reputation decided it. No doubt they will have spoken to friends, family, and colleagues to ask if they'd used anyone — **46% of clients choose their solicitor that way.**

Perhaps (especially if they're a business client) they looked for your ranking and commentary in legal directories. They almost certainly read online reviews — **over 70% of clients' decisions are influenced by them.**

There's no mystery as to why your reputation has so much influence — your website, thought leadership, and marketing all play a vital role in promoting your firm and its image, but what you say about yourself will never carry as much weight or power as what others say about you.

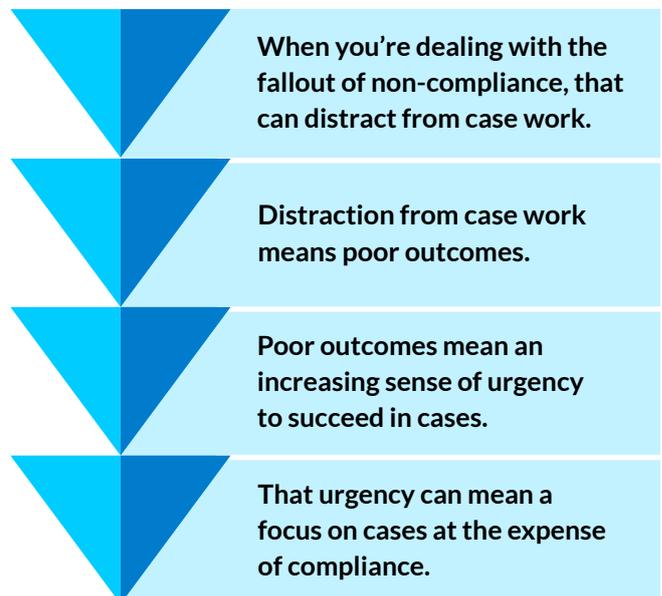
Legal matters are intensely emotional for clients, and for them it's critical that they find a safe pair of hands, not only for the obvious reason that it helps the outcome, but because they need reassurance at what can be a time of great anxiety.



## What is your reputation based on?

The three elements of your legal reputation are your track record, your client service, and your regulatory standing.

If one suffers, your reputation takes some damage. That damage could range from minor to catastrophic, but even a minor problem in one aspect has a knock-on effect.



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## How do you protect your reputation?

**Of course, behind an excellent track record, first class client service, and a spotless history are your legal expertise, empathy, and diligence.**

However, even the world's most expert, empathetic, and diligent solicitor can see their reputation undermined if they don't have defined and disciplined processes. Those processes are the foundations which support your qualities as a solicitor and as a firm. Without them, you're like a world class tennis player whose court is mud instead of grass – no matter how good the forehand, the ball isn't going to bounce to you.

Each side of your trust triangle requires several supporting processes. Now, solicitors have their processes already – some are intuitive, some learned, some discovered, but in one way or another, those worth their salt know how to serve clients, manage

a case, and perform their due diligence.

What many firms lack in those processes is standardisation. One solicitor can have processes that work for them, and another can have theirs. So can paralegals, accounting staff, secretaries, and practice managers. Between the colleagues in a firm, minor differences in major processes have enormous consequences.

What the firm needs, then, is not only to agree on the processes, but to put in place structures that make those processes unambiguous and consistent.

The reasons that processes differ are predominantly personal preference and interpretation, which, in the absence of explicit guidance, are what all staff and fee-earners will revert to.

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# Legal outcomes

## Case management

**Of all reasons that an outcome wasn't satisfactory, administrative error or inefficiency must be the most frustrating. Missed deadlines, misunderstandings, and missing documents can call be devastating to a case, and they're all so easily preventable.**

When legal processes can be automated, that means that they don't need to be remembered or implemented by someone who can forget them, or whose time could be better used.

A case management system will streamline the firm's work, creating workflow steps for legal forms, setting diary appointments, and posting requests, among many other things – nothing can be neglected.

## Client communication



**Better client communication means better outcomes, sooner. When it comes to the back and forth of client-firm communication, clients exist on a spectrum that ranges from largely unresponsive to hugely overzealous.**

At the former, the client never seems to pick up the phone, is slow to reply to emails, and is unforthcoming when the firm requests documents and information. That means the cases that build and maintain your reputation don't resolve as quickly as you'd hope and expect.

At the latter, the client expects constant updates, and produces much larger quantities of documentation than you expected or requested.

A client portal handles both. The less responsive client gets a very user-friendly interface, which encourages action far better than emails and phone calls. The zealous client gets to satisfy their craving for information by logging on and seeing their case progress without a member of the firm having to update them.



# Client experience

## Case management

**According to the SRA, almost one fifth (18%) of complaints about law firms are about delay. In the conveyancing sector specifically, 37% of complaints are about a firm's inefficiency.**

Case management processes mean that everyone in the firm clearly sees all outstanding tasks, automated workflows, and full documentation and case history. That means a much more realistic and informed timeline.

## Communication and document transfer

**Two opposite experiences can lead to one outcome – a client feeling in the dark. Those two scenarios are:**

- a) an absence of information
- b) an excess of information

With too little information, the client obviously has no way of knowing where things stand, and with too much, they can be overwhelmed and uncomprehending. Poor communication (in this case, in conveyancing work) is the number one complaint from 22% of unhappy clients.

Ideally, the firm would provide a repository for case progress, document provision and information requests. By offering that location, the client can access precisely as much as they want, exactly as frequently as they want.

## Billing

**12% of complaints are about excessive costs and only 65% of clients think the legal service they received was good value for money.**

An invoice with one large number expresses nothing except a demand for payment. When the bill is higher than the client hoped or expected, there can be real confusion and dismay.

A properly itemised bill might not relieve the pain, but it will be justified, and your client would be less likely to feel exploited.

The only way to provide that kind of invoice is to record your time accurately. Because time recording without supporting processes is a tedious chore, many solicitors don't do it. When your process is intuitive and specifically tailored to a firm's workflow, it's significantly less of a burden.



# Compliance



## Due diligence and regulation

There are myriad rules set by the SRA, the Law Society, and HMRC. Without processes in place to navigate them, firms face the very immediate risk of at least one compliance breach.

Regulations never decrease in number — since there are only ever more rules, as time goes on you can rely less and less on the astuteness of your colleagues and account staff.

Conflict checks, handling client money, interest payment, prompt payment of suppliers, and correct submission of VAT returns are all vulnerable points, and here is where your process needs the support of a system that can monitor compliance much more quickly and accurately than humans.

## Case management

Your case management process should include compliance-focused checks, such as approaching deadlines, necessary escalations, or completeness of information.

Once again, relying on the instincts and observations of your colleagues is a little too imperfect, given the consequences at play.

When those checks and balances are provided and performed by software, the system will certainly notice what a human might miss.

## Compliance Software...



Performs thorough conflict checks and supports your firm's procedures for anti-money laundering



Generates reports that compliance officers can review



Records all payments to the satisfaction of HMRC's Making Tax Digital regulations



Flags breaches



Provides warnings on potentially non-compliant financial postings

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# Drawing the triangle

When you can rest assured that all of your work is compliant, you have more time to focus on your cases.

-  More time for case work means better outcomes and more attention for your clients.
-  Better outcomes and more attention mean happier clients.
-  Happier clients mean a better reputation and more referrals.

You're fully compliant, your clients are happy, and you're delivering results – the triangle is complete. Manage all three sides with Insight Legal – over 1000 firms are managing their cases, compliance, and client communication with us, and a 30 minute, no-obligation demo will show you why.

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