

# Practice perfect: strategies for growing your legal practice

Gain efficiency, convert callers, and retain existing clients.

## TABLE OF CONTENTS



<b>INTRODUCTION</b>	<b>3</b>
<b>1: THE STATE OF THE LEGAL INDUSTRY</b>	<b>4</b>
Fractured demands and increasing workloads	
<b>2: LEGAL CLIENT EXPECTATIONS</b>	<b>3</b>
Understanding the current customer experience climate	
Considering client service vs. client experience	
Additional needs of legal clients	
<b>3: FOCUS AREAS FOR GROWTH</b>	<b>8</b>
Efficiency	
Conversion	
Retention	
<b>4: IMPROVING EFFICIENCY</b>	<b>9</b>
Increasing billable hours	
The cost of interruptions	
Reducing interruptions through delegation	
Integrations reduce busywork	
Improving efficiency with Ruby	
<b>5: CONVERTING CLIENTS</b>	<b>17</b>
Responding quickly to client requests	
Providing critical information	
Creating a personal connection	
The value of meeting client expectations	
Phone calls remain a primary source of contact	
Virtual receptionists can help you deliver	
24-7 live chat captures website leads	
<b>6: RETAINING CLIENTS</b>	<b>27</b>
The value of existing clients	
Designing an ideal customer experience	
<b>7: RUBY'S VIRTUAL RECEPTIONIST SERVICE</b>	<b>30</b>
Our services	
What our customers have to say	

## INTRODUCTION

While legal firms can be as diverse as the lawyers who founded them when it comes to size, location, specialty, and more, nearly all share a common goal—the desire for growth. Eighty-seven percent of lawyers would like to see their firms grow over the next three years, and the majority agree that increasing their revenue and expanding their client base are the most important factors that deliver growth.<sup>1</sup> In a recent survey conducted by Ruby, we found that 43% of attorneys consider these same areas their most critical challenges.

Since many factors can contribute to these outcomes, it can be challenging to identify where to focus your limited resources and which tactics will provide the most meaningful return on investment.

### **So how can law practices ensure growth by increasing their revenues and expanding their client bases?**

We analyzed legal industry research, spoke with Ruby customers, and leveraged consumer trends to identify key factors that impact growth. This eBook covers those topics, and offers practical strategies to help you excel without sacrificing work-life balance.



# 87%

of lawyers would like their firms to grow over the next three years, and the majority agree that increasing their revenue and expanding their client base are the most important factors that deliver growth.<sup>1</sup>

# 43%

of attorneys consider these same areas their most critical challenges.



## WE'LL EXPLORE:

- The state of the legal industry
- Expectations of today's legal clients
- Three focus areas that deliver consistent growth
- Tips for maximizing efficiency to increase revenue
- Ways to increase conversions and expand your client base
- How to retain existing clients and turn them into referrals

<sup>1</sup> 2019 CLIO LEGAL TRENDS REPORT

## PART ONE

# The state of the legal industry.

Today's attorneys are under more pressure than ever to do it all, do it quickly, and do it well.

The majority of the industry is made up of solo practices and small to mid-sized firms that require attorneys to do more with less, wear many hats, and switch between the work they love—practicing law to benefit clients—and work that must be done to manage the business.

With limited hours, increasingly long days, and the fractured demands of running a legal practice, deciding how to allocate your time can be a challenge. Balancing marketing, business development, administrative work, existing cases, incoming calls, and other interruptions can quickly lead to a packed schedule. It's no wonder that 76% of lawyers feel overworked,<sup>2</sup> and nearly as many report working outside regular business hours.<sup>3</sup> The good news is that 82% of lawyers genuinely enjoy their work with clients.<sup>4</sup>

Since working with clients depends on closing new business, we've shared some insight into the way clients think to help increase your chances of getting hired.

Attorneys say...

# 76%

feel overworked,<sup>3</sup> and nearly as many report working outside regular business hours.<sup>4</sup>

# 82%

genuinely enjoy working with their clients.<sup>4</sup>



<sup>2</sup> CLIO LEGAL TRENDS REPORT

<sup>3</sup> IBID

<sup>4</sup> IBID

## PART TWO

# The state of the legal client.

Technology has impacted our lives, behavior, and expectations in myriad ways. No matter where we go, we are immersed in our devices, living in a 24/7, on-demand world. Expectations are high, attention spans are short, your reputation is in the hands of any customer who decides to write an online review, and the competition is never more than a click or tap away.

### Better, faster, stronger.

When asked how client expectations have changed over the past few years, attorneys were nearly unanimous:

*Both existing and potential clients want (& expect) almost instantaneous responses to their inquiries.<sup>5</sup>*

There are mountains of statistics that drive this point home while highlighting the importance of designing an ideal client experience.



### Client expectations:

**71%**

expect companies to communicate with them in real time.<sup>6</sup>

**84%**

say the experience a company provides is as important as its products or services (up from 80% last year).<sup>7</sup>

**73%**

expect companies to understand their needs and expectations.<sup>8</sup>

**8%**

believe that companies meet their expectations for excellent service.<sup>9</sup>

<sup>5</sup> RUBY "PRACTICE PERFECT" SURVEY

<sup>6</sup> SALESFORCE CUSTOMER ENGAGEMENT TRENDS

<sup>7</sup> IBID

<sup>8</sup> IBID

<sup>9</sup> BAIN & COMPANY CLOSING THE DELIVERY GAP





A survey of Ruby's legal customers confirms the trend, with 66% of attorneys reporting that instant, on-demand engagement is a critical factor for their clients.

Top ten companies like Amazon and Apple have set the bar high, making significant investments in customer experience and delivering on the promise of instant gratification. Their speed, quality, and ability to make life easier have placed increased pressure on all companies across every industry.

*In fact, 73% of customers admit that one extraordinary experience raises their expectations of all other companies.<sup>10</sup>*

<sup>10</sup> SALESFORCE CUSTOMER ENGAGEMENT TRENDS

## The relationship between client service and client experience

Our digital world has increased the number of ways that clients can experience your brand. Where it used to be enough to focus on client service by answering questions and providing solutions to problems, those elements are now just one part of your customer experience ecosystem. Customer experience encompasses every possible way that a client can interact with your firm, from how you appear in search to online reviews to your website to the way phone calls are answered.

### Legal clients face added stress.

Legal clients experience challenges that go beyond the needs and expectations of typical customers because they are more likely to be in a moment of personal crisis.

*While all types of customers have instant expectations, legal clients often truly do need help right away.*

Your response to potential clients has the power to turn their feelings of anxiety and confusion into relief and loyalty, if the experience is positive, or frustration and anger if the interaction doesn't go well. And every client you speak to has the power to become a source of positive reviews and referrals or reputation-damaging negative word of mouth.



## PART THREE

# Key factors for ensuring growth

While meeting client expectations is more critical and more difficult than ever, attorneys face significant time pressure and competing priorities that can get in the way of delivering the ideal client experience. How can these issues be resolved to help law firms grow? Research demonstrates three key areas of focus you can rely on to increase your revenue and expand your client base.

## 1 Improve efficiency.

For lawyers, time truly is money. To increase revenue, you need to maximize billable hours. Higher utilization rates have been shown to drive growth far more consistently than the number of lawyers at a firm, the type of law practiced, or average hourly rates.<sup>11</sup> While a fully billable day may be out of reach, even small daily gains make a big difference over the course of a year. To make it happen, you'll need to capitalize on every opportunity to increase efficiency and productivity.

## 2 Convert callers to clients.

Clients expect responses that are both timely and detailed. Delivering above and beyond their expectations can help you stand out from your competition, make a great first impression, and expand your client base. Increasing responsiveness while also increasing billable hours may seem mutually exclusive, but a few smart investments can help you achieve both goals.

## 3 Retain existing clients.

Landing new clients is just the beginning. Retaining them and turning them into advocates requires consistent communication and stellar service that prioritizes empathy, kindness, and personalization.



In the next sections, we'll dive deeper into these topics and share helpful solutions that can put your firm on the path to growth.

<sup>11</sup> 2019 CLIO LEGAL TRENDS REPORT



## PART FOUR

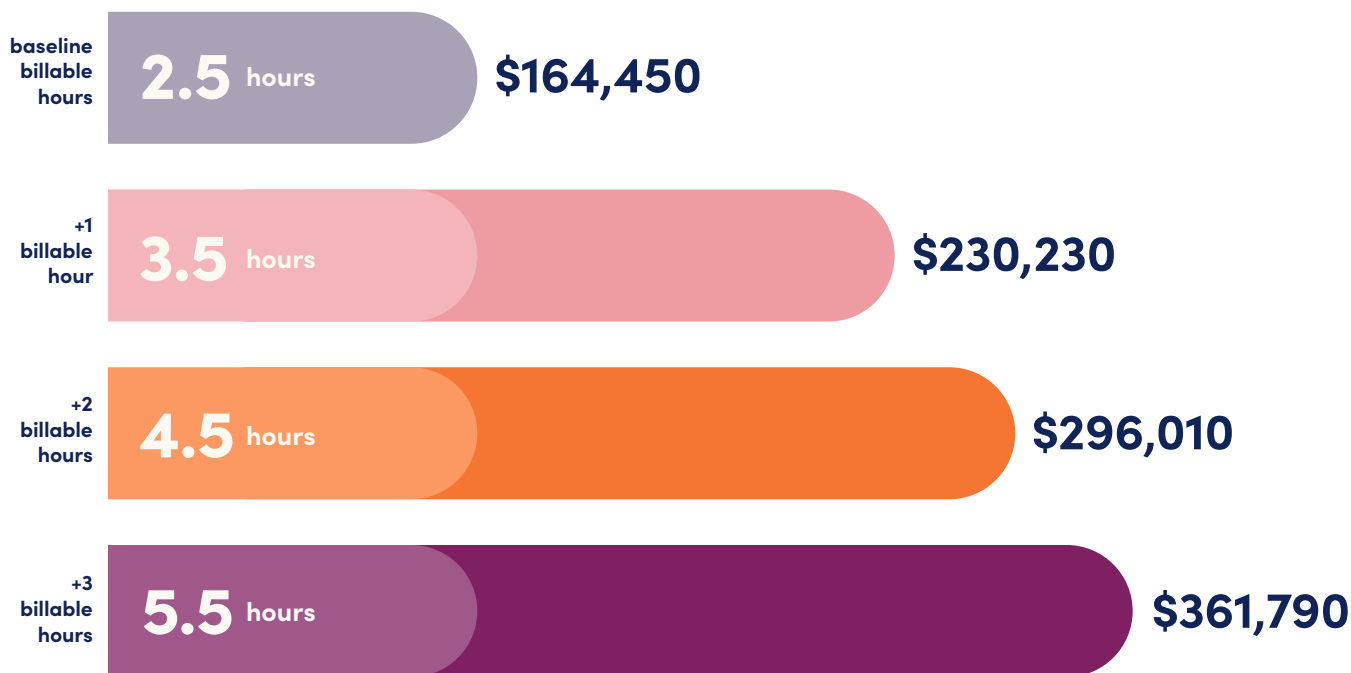
# Improving efficiency

Over the past four years, one legal industry trend has remained consistent—most lawyers are only able to work a few billable hours each day. In 2019, lawyers across the United States worked an average of just 2.5 billable hours daily.<sup>12</sup>

This represents a tremendous opportunity to capitalize on additional hours of revenue-generating work. It's simple math to see how fast one or two more billable hours each day could add up to strengthen your law firm's annual revenue.

### Annual income potential of increased billable hours.<sup>13</sup>

(based on Clio's Billable Hour Index average rate of \$253/hr)



<sup>12</sup> 2CLIO LEGAL TRENDS REPORT

<sup>13</sup> CLIO BILLABLE HOUR INDEX

# Where do the missing hours go?

Since increasing billable hours is the key to increasing revenue, it's helpful to understand how non-billable time is typically spent.

**Non-billable work typically falls into three major buckets:**

- administrative tasks
- marketing
- business development

Solo, small, and even mid-sized firms are particularly prone to competing priorities and distractions.



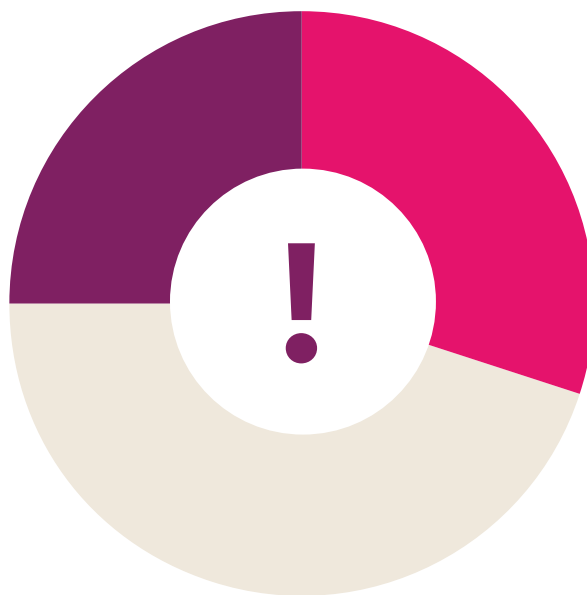
*“When I started my practice fifteen years ago, I knew that I wanted to leverage technology in order to get the most productivity and cost-effectiveness out of my time spent.”*

**Neil Tyra**

THE TYRA LAW FIRM

# The cost of interruptions.

While administration, marketing, and earning new clients are all important, they have an incredible ability to interrupt billable work and take a toll on productivity. While it may not seem significant to spend 15 minutes here and there to stay on top of all things, research shows that interruptions, no matter how small, can have a major impact.



## 25%

of legal professionals  
are interrupted more  
than ten times per day.<sup>14</sup>

## 30%

are interrupted  
between six and ten  
times per day.<sup>15</sup>



Getting back to work after being interrupted takes an average of **23 minutes**.<sup>16</sup> Even if you are on the lower end of the spectrum at six interruptions per day, that still adds up to **more than a two-hour** loss in productivity each day. Just three fewer interruptions per day could help you avoid a loss of

## \$65,780 every year.



<sup>14</sup> CLIO LEGAL TRENDS REPORT

<sup>15</sup> IBID

<sup>16</sup> FAST COMPANY

# Reduce interruptions through smart delegation.

Since non-billable work still needs to be addressed, the key is finding ways to **streamline, outsource, and automate** tasks that don't require your legal expertise—without sacrificing responsive and helpful client service.

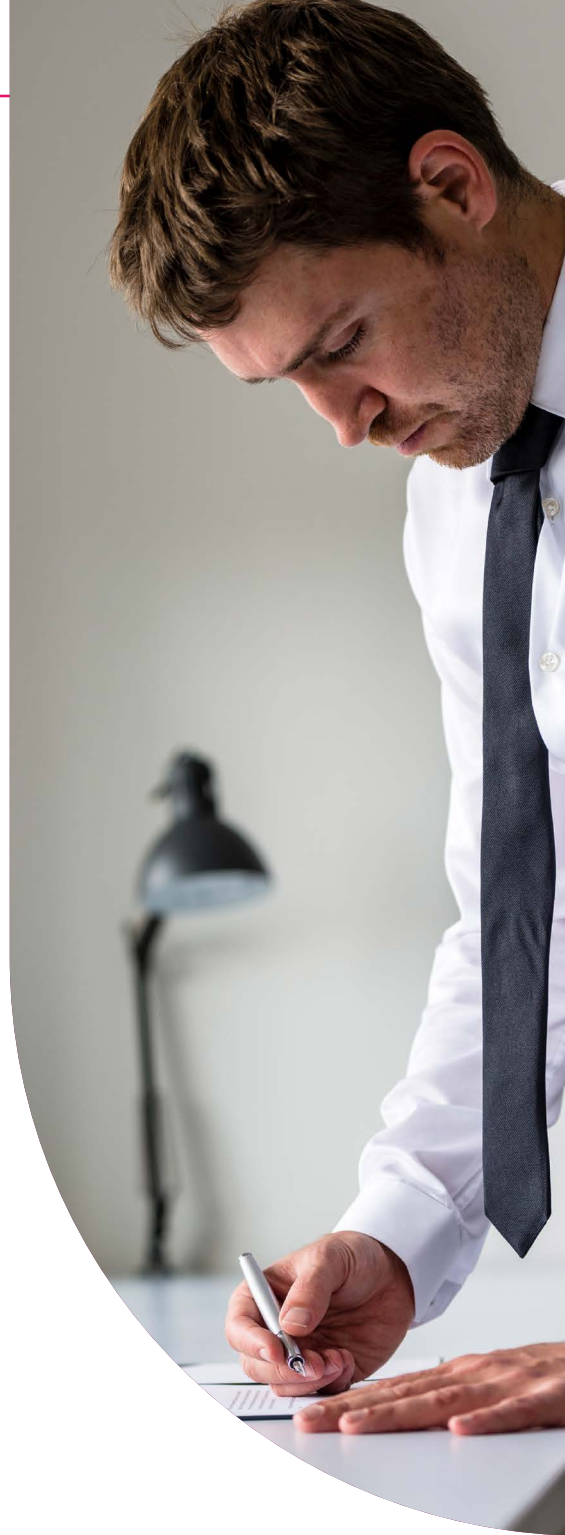
One easy example is phone calls. A ringing phone can distract anyone, whether it's someone trying to sell you something or a critical call that could result in your next big case. But avoiding distraction by letting calls go to voicemail can result in missed opportunities, and messaging services often feel impersonal, making a less than ideal impression on potential clients.

Live virtual receptionists are the best solution. They offer friendly, professional, and personalized service that represents your brand and provides your clients with the experience they expect.

Ruby receptionists operate like an extension of your team, making sure your clients feel welcome and heard. Taking messages is just the beginning. Ruby's live virtual receptionists can also screen calls based on your instructions, set expectations with clients about when you will be available, and conduct client intake over the phone.

Rubys are specifically trained to take cues from your clients and respond appropriately, helping them through the stress, fear, and anxiety that often accompany legal issues.

Knowing your phone calls are answered by warm, empathetic professionals will allow you to focus on billable client work, avoid interruptions, and schedule time to respond to calls that require information only you can provide.



*"Ruby removes at least two or three interruptions in my day. That, by itself, is worth what I pay for Ruby."*

**Dean Alterman**

ALTERMAN LAW



*"Ruby has been very helpful because we can get messages taken and avoid calls that are extraneous."*

**Somita Basu**

NORTON BASU LLP



# Integrated systems reduce busywork.

In addition to addressing the distraction of a ringing phone, Ruby integrates with Clio Manage, Clio Grow, Rocket Matter. These integrations can save you even more time by transferring messages and client details directly into systems you already rely on. There's nothing that needs to be manually entered, so no critical data gets lost in the shuffle.



\*\*\*\*\*

*"Practice management software has been a huge timesaver for me and my staff. From intake through to the end, it has been a tremendous benefit so everyone knows exactly where a lead is at any given time. Ruby integrating with Clio has been a huge benefit too."*

**Maria Shinn**

SHINN LAW FIRM

# Ruby delivers the efficiency law firms need.

Ruby customers gain significant efficiency—helping them beat the national average of 2.5 hours billable hours per day. When surveyed, 46% of Ruby's customers reported billing between three and five hours per day, with 44% billing more than five hours.

*That's a difference of \$32K–\$165K a year!*

National average:

**2.5** billable hours a day.

46% of Ruby's customers:

**3-5** billable hours a day.

44% of Ruby's customers:

**5+** billable hours a day.



*"The overriding thing for us is to be as efficient as possible. There are plenty of tools out there to help people, whether it's customer relationship management tools or services like Ruby that allow us to focus where we want to focus, when we want to focus. It allows us to be more efficient."*

**John Usher**

USHER LAW FIRM



Applying the right tools and services can help you manage interruptions and regain the focus needed to maximize billable work and increase your firm's revenue. It can even help you win back valuable personal time.



## PART FIVE

# Converting clients.

One of the most direct ways to expand your client base is to brush up your ability to turn callers into clients.

Since 58% of legal clients sought a consult with a lawyer that didn't result in a hire, and 68% communicated with a lawyer they didn't end up hiring, there's clearly opportunity to capture more of the business that is already reaching out.<sup>17</sup>

Additional data shows there are three relatively simple things you can start doing right away to impact your ability to win more business from the phone calls you already receive. It comes down to:

- being responsive to all client inquiries
- providing transparent answers to client questions
- projecting a warm and friendly tone

Comparing client expectations to reality reveals a significant gap that smart firms can capitalize on to win more clients.



<sup>17</sup> CLIO LEGAL TRENDS REPORT

# Respond quickly.

**Eighty-two percent of legal clients agree that timeliness is important to them.**<sup>18</sup>

So what does timeliness mean?

While 45% of clients expect a response within 24 hours, 24% expect it within just a few hours, and another 10% within one hour.<sup>19</sup> Since clients have varying degrees of patience, the sooner you can respond, the better your chance of capitalizing on every opportunity.

While this may seem obvious, it presents a more significant opportunity than you may think, since 64% of legal clients shared that they **contacted law firms that never responded.**<sup>20</sup>



## 45%

of clients expect a response within 24 hours.

## 24%

of clients expect a response within a few hours.

## 10%

of clients expect a response within one hour.<sup>19</sup>

<sup>18</sup> CLIO LEGAL TRENDS REPORT <sup>19</sup>

IBID

<sup>20</sup> IBID



*"People call you after they've had an accident and there are a million personal injury lawyers out there. If you don't answer the phone, or give them a sense that you're going to return their call very quickly, they're going to move on to the plethora of attorneys competing for your business."*

*Neil Tyra*

THE TYRA LAW FIRM



# Respond well.

Legal clients also made it clear that helpful information is nearly as important as a quick response. In reality, this level of clarity is hard to come by. Legal clients also shared their perceptions about how often lawyers are able to meet their needs when they call.

## Client expectation vs. reality<sup>21</sup>

<b>81%</b> want an instant response to each question they ask.	<b>61%</b> didn't get enough information they could understand.
<b>80%</b> want a clear understanding of how to proceed.	<b>65%</b> didn't get any indication about what to do next.
<b>76%</b> want to know how much their legal issue could cost.	<b>64%</b> didn't understand how much their case would cost.
<b>74%</b> want to understand what the full process looks like for their case.	<b>62%</b> didn't understand the process for their case.

*"Clients are in a world of instant responses and instant information. They want real information before they hire."*

**Maria Shinn**

SHINN LAW FIRM

<sup>21</sup> CLIO LEGAL TRENDS REPORT

# Respond with kindness.

A final critical factor is related to the way you make clients feel. Sixty-four percent of legal clients make decisions based on the friendliness and likeability of a lawyer's tone, and 52% have decided not to hire a lawyer because they were not likeable or friendly enough.<sup>22</sup> The perception of friendliness and likeability begins from the first time a client calls and can be impacted by every experience leading up to hire.

Ruby receptionists ensure that calls are answered with a tone appropriate to each caller's situation, offering an immediate sense of connection, friendliness, and likeability to set you up for success.

\*\*\*\*\*

*"Most people don't see attorneys under happy circumstances unless they are working on a business deal. In your personal life, you're either planning for your death, or someone has died, or you're getting divorced, or someone was hit by a car... having some compassion helps attorneys bring things down to the level of their clients."*

**Somita Basu**

NORTON BASU LLP

<sup>22</sup> CLIO LEGAL TRENDS REPORT

# Meeting client expectations means business.

Since many clients shop around, your ability to meet their expectations can make or break your first impression and your opportunities.

44%

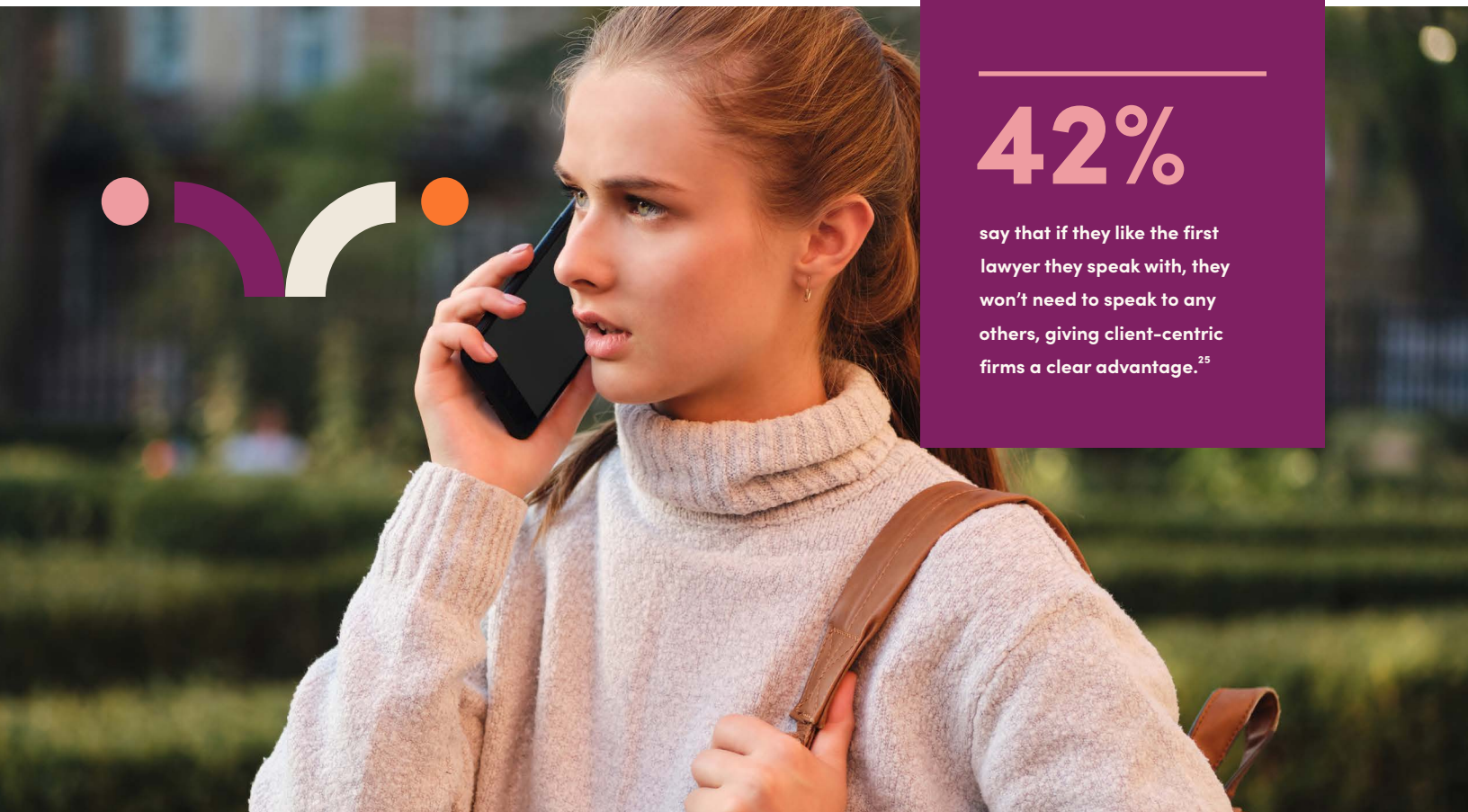
of clients believe that they need to shop around to find the lawyer that's right for them.<sup>23</sup>

57%

of those who have ever shopped for a lawyer say they contacted more than one law firm.<sup>24</sup>

42%

say that if they like the first lawyer they speak with, they won't need to speak to any others, giving client-centric firms a clear advantage.<sup>25</sup>



<sup>23</sup> CLIO LEGAL TRENDS REPORT <sup>24</sup>

IBID

<sup>25</sup> IBID

# The phone reigns supreme.

While clients reach out in multiple ways, the majority of those who contact law firms for the first time rely on picking up the phone and making a call.

**Sixty-eight percent of legal clients report making initial contact by phone.<sup>26</sup>**



*“Our clients prefer to talk with someone during their initial encounter. We’ve found that even younger clients—folks that should certainly have better facility with technology—still don’t want to email or chat with us. For that reason, our phone remains our front door and I don’t see that changing any time soon.”*

**Cameron Kuhlman**

DUFFY & FEEMSTER LLC

26 CLIO LEGAL TRENDS REPORT



# Virtual receptionists help you deliver.

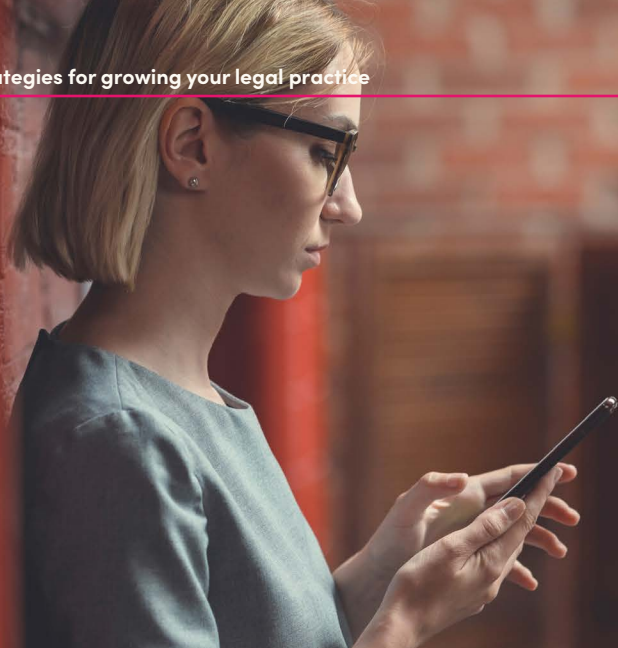
Demonstrating responsiveness, providing helpful information, and establishing a warm and friendly first impression are key factors in turning callers into customers. They also happen to be Ruby's specialties.

We make sure that no call goes unanswered and that the right information gets delivered. What's more, we work to create meaningful personal connections that help you grow your business, taking every opportunity to make the day a bit brighter for every client who calls.

As a result of our support, Ruby customers report that they are able to get back to their clients quicker. Fifty-eight percent of Ruby customers respond to clients within three hours and nearly all respond the same day, even though the majority are unable to get to the phone for more than three hours a day as they focus on other work.



In addition, 45% of Ruby customers say that new calls result in new clients at least 50% of the time, and 53% of Ruby customers say that our receptionists provide the greatest return on investment when compared to other client-facing business practices.



*"The reason why we moved to Ruby was that our call volume was enough that one person could not effectively answer every simultaneous call and give everybody that kind of focused attention. We didn't outsource our call handling previously because we did not want to have the answering service approach. Ruby solved that."*

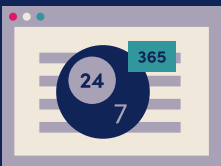
*Cameron Kuhlman*

DUFFY & FEEMSTER LLC



# Capture website leads with 24/7 live chat.

While phone calls remain the number one way that potential clients reach out, more and more legal customers conduct initial research online, especially younger generations who tend to find the legal process intimidating.



49% of Gen Z clients and 48% of Millennials report say that a law firm's **website** matters to them.<sup>27</sup>

Offering chat services allows your firm to proactively connect with clients and answer their questions in the moment. While chatbots can be irritating and awkward, Ruby's live, US-based chat specialists are experts at making human connections and building a preference for your firm before a potential client even picks up the phone.



27 2019 CLO Legal Trends Report

## PART SIX

# Retain existing clients.

The other side of expanding your client base relies on retaining the clients you have already earned by keeping them happy on an ongoing basis. When existing clients are happy, they are likely to bring you future work and referrals to their family and friends. They also form the basis of your reputation as a source of online reviews and word of mouth.

**Reputation and referrals remain critical sources of business.**

**56%**

of Ruby customers say that more than half of their business comes from referrals.<sup>28</sup>

**63%**

say that their reputation is the number one reason that clients choose to work with them.<sup>29</sup>

Retaining existing clients is also good for your bottom line. Acquiring new clients is significantly more expensive than retaining existing ones. Increasing your client retention rate by just 5% can increase your profits by 25–95%.<sup>30</sup>

Retaining clients means providing personal, friendly, empathetic service on a consistent basis, across every interaction. While it takes a lot of work to earn a client's trust, it can be lost very quickly, and that loss can easily extend beyond your client to other people they know.

- 33% of Americans say they'll consider switching companies after just a single instance of poor service.<sup>31</sup>
- Americans tell an average of 15 people about a poor service experience, versus the 11 people they'll tell about a good experience.<sup>32</sup>

Increasing your client retention rate by just 5% can increase your profits by

**25–95%<sup>30</sup>**

<sup>28</sup> RUBY "PRACTICE PERFECT" SURVEY

<sup>29</sup> IBID

<sup>30</sup> BAIN & COMPANY PRESCRIPTION FOR CUTTING COSTS

<sup>31</sup> AMERICAN EXPRESS CUSTOMER SERVICE BAROMETER

<sup>32</sup> IBID

# Make your client experience stand out.

At Ruby, we practice Wowism. That means going above and beyond to create amazing experiences. We take every opportunity to anticipate your client's needs, provide them with solutions before they ask, and deliver unexpected moments of delight. We believe there's no better way to retain clients than by treating them with care, every time.

Ruby customers share the same values, allowing us to unite forces and deliver powerful client-centric service that results in strong retention, great online reviews, and positive word of mouth.



*"As a small business owner, having Ruby answer my calls live has been the best thing for my business. They provide excellent service, the app works really well, and their communication is spot on. They are dedicated to your clients having the best experience possible."*

**John Chang**

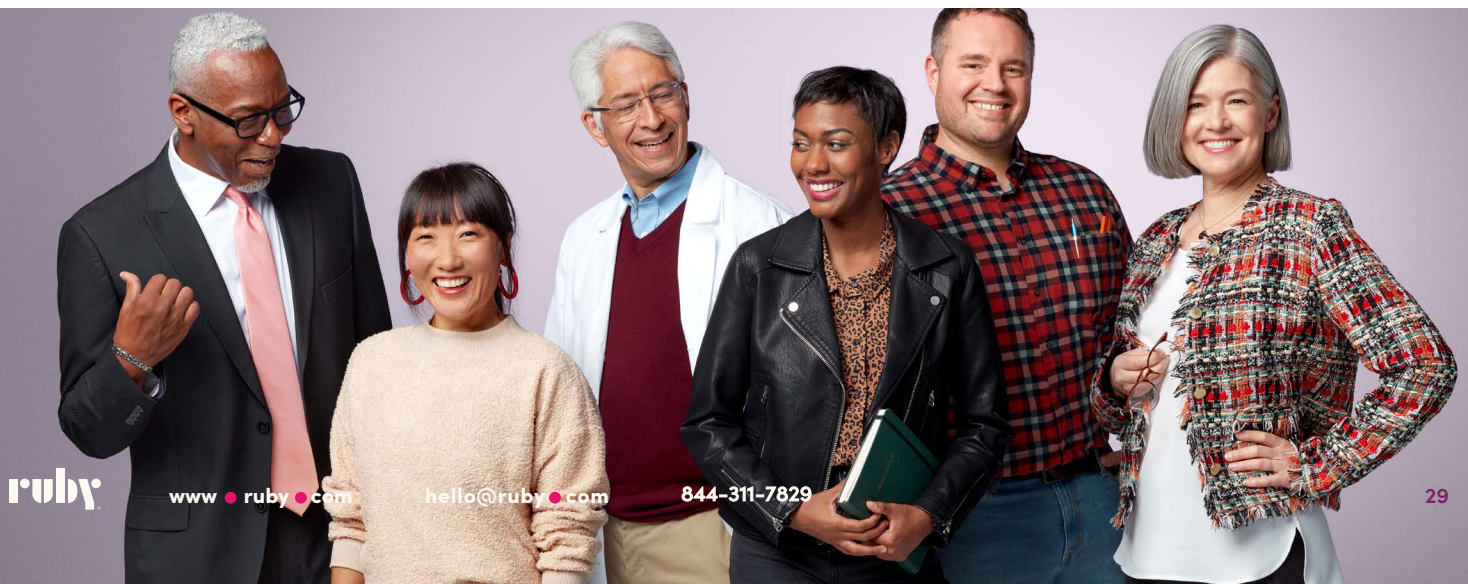
PATINELLI AND CHANG



*"In many cases, we in the legal profession had this hero kind of mentality, where the attorney is the focus of the interaction. And I think the more we can do to change that, to make the client the focus of the attention, the better serviced we're going to be. I've tried to model my practice to ensure that the experience is one of value and that the whole relationship is client-oriented, not attorney-oriented."*

**Neil Tyra**

THE TYRA LAW FIRM



## PART SEVEN

# Bringing it all together.

Some of the most important things you can do to impact your firm's growth are also the simplest:



Freeing up your time so you can focus on billable work and apply your expertise where it belongs—working on behalf of your clients.



Meeting basic client expectations by returning their calls, answering their questions and offering them empathy and human kindness.



Continuing to build relationships with existing clients by providing consistent and exceptional client service every time.

---

But simple doesn't mean easy. And it's nearly impossible to do it all alone. To nail these critical areas, grow your revenue, and expand your client base, you'll need an expert partner on your side.

# Ruby is here to help.

Ruby provides the real, human connection between law firms and their clients. In this tech-driven world, our people provide a level of personalization that technology can't touch.

We listen to clients and craft each experience to build a great relationship. We learn with each interaction, always improving our level of service. In turn, our service builds loyalty and helps your firm grow and thrive.

## OUR SERVICES

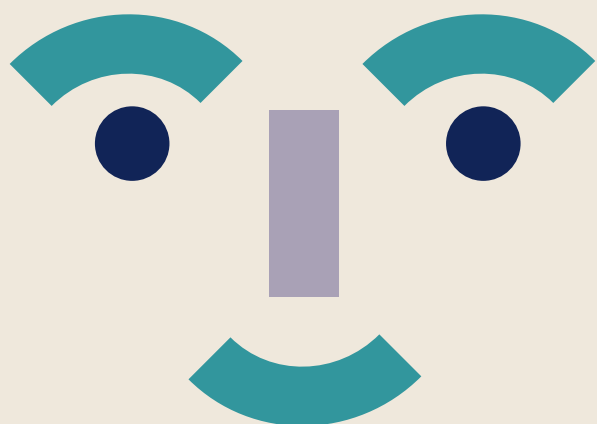
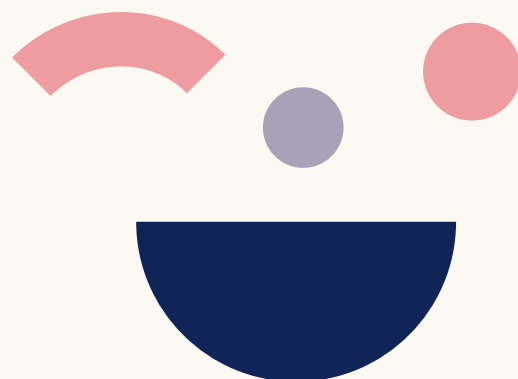
Ruby's live virtual receptionists and 24/7 chat services deliver exceptional client experiences that help you save time, win trust, capture new business, and build loyalty. Our specialists are trained to represent your business just as you would. They are indistinguishable from an in-house coordinator, at a fraction of the price. We help ensure the success of more than 4,000 law firms, every day.

From answering your calls while you're in court to transferring high-priority callers to conducting intake or capturing lead data while you're with your family—Ruby is there to offer friendly, professional service that sets your practice apart from the competition. Ruby even offers a convenient mobile app you can use to update your availability, check messages and more while you're on the go.

*"Ruby delivers exactly what they promise, every time. It is crystal clear they take their job seriously and make it their mission to do it very well. They easily, without question, get my highest recommendation."*

**Eric Johnson**

UTAH FAMILY LAW



*"Ruby has truly been key to converting potentials into clients, growing my practice—while freeing me to be a lawyer and giving me peace of mind at an affordable price."*

**Diane Haar**

HAWAII DISABILITY LEGAL SERVICES





**Try Ruby and see  
why 15,000+  
customers trust  
Ruby with their  
most important  
asset: their clients.**



Our customers report increased productivity, better profit margins, and higher client retention rates.

Learn more about how Ruby's live, friendly receptionists and chat specialists can help you turn prospects into clients, earning more referrals and commissions.

Contact us today!

**866-611-ruby**(7829)

**www • ruby • com**