

## Expand Your Solo or Small Firm Practice Using Client Portals

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The American Bar Association’s eLawyering Task Force has defined a “virtual law practice” as one where client has access to the firm’s lawyers, communications and documents related to their legal matter through a password protected and secure web space where both the attorney and client may interact, documents shared, and legal services consumed by the client.

A “secure web space” that is accessible to a client is commonly known as a “client portal”. [The term is most often applied](#) to an electronic sharing mechanism between an organization and its clients. The organization provides a secure entry point, typically via a website, that lets its clients log in to an area where they can communicate, view and download documents, collaborate on document editing and upload private information. The portal exists only on the web and data is stored in the cloud. When data is transmitted between the secure portal and the client, it is encrypted.

Use of a client portal is very effective in helping solos and smaller, boutique firms compete with bigger firms by capturing new Internet-savvy clients with a distinctive client experience, while increasing law firm productivity. A client portal converts a law firm’s static web site into an interactive tool for capturing new clients and serving existing clients more effectively.

This is a difference between being a “virtual law firm” and being an “untethered lawyer.” You can characterize an “untethered lawyer” as one who is mobile and free from a specific office location, using open email for communicating and document-sharing as a primary means of connection to clients. A “virtual Lawyer” is also an “untethered” lawyer, but he/she is also much more than that when integrating a client portal into their virtual practice model.

To access a portal, clients must create a username and password that will allow them access all the information, including communications, related to their matter that has been input, uploaded or documented within the secure space. The portal’s construction, made functional by your configuration, includes permissions, which restricts clients’ access to their legal matter only.

As a web application, client portals have become pervasive in almost every professional service sector, other than the legal profession. When you sign on to manage your bank accounts or investment portfolio, book a flight, pay an online bill, sign on to your Facebook, or purchase a legal document from LegalZoom or RocketLawyer, you are inhabiting a client portal.

In today's business world, client portals are the rule, rather than the exception, in providing online services by the financial sector. An increasing number of accountants are using portals to receive client source documents and post their completed tax returns. Driven by [regulatory compliance issues](#) in data security similar to those that apply to lawyers, officials say that client portal technology is no longer an accessory for accounting firms – it is a necessity for firms that want to do business in the ever-expanding world of wired commerce.

Likewise, without a client portal web application, it is difficult or impossible for lawyers who offer a virtual practice option to their clients to comply with the rules of professional conduct related to UPL, client confidentiality, establishing the lawyer/client relationship, and conflict of interest issues. They cannot offer secure communications, document storage or transmission, or transactions such as payment of a legal bill online.

A secure client portal, used in conjunction with practice management technology, adds to the efficiency and productivity of a solo or small law firm practice, and changes the way clients interact with their lawyers. It also works in conjunction with other hardware and software products to add multi-factor authentication for added security.

Until recently, client portal applications were expensive to license and implement. They were utilized only by larger law firms to connect with their corporate clients, who expected to interact with their lawyers the same way they interacted in business. During the past three years, a new segment of the legal applications industry has emerged which provides affordable cloud-based client portals that are specifically designed for solos and small law firms. Licensed as a "Software as a Service", the typical subscription fees for a client portal range from as low as \$49.00 a month for a solo practitioner to \$299.00 depending on the number of features. The price also goes up depending on the number of users. However, the cost is relatively low compared to the potential for revenue generation and enhancement of the client experience.

Here is a representative list of vendors who offer client portal SaaS products, varying in features from a simple shell portal to one that incorporates a fully functional practice management system.

### **Simple Client Portal Messaging and Document Sharing**

These systems are designed to create web locations for each of your projects (or legal matters). You can then invite others to share the space with you, and everyone within that group can upload, download, share, edit, and store documents in the space. You communicate with each other by

creating a message within the shared space. Emails are then sent to the message recipients informing them that they have a message waiting for them in the system.

Three good client portals that employ the necessary security protocol are [OneHub](#), [Box.net](#) and [Dropbox](#).

## **Project Management Client Portals**

Project management is somewhat new to the legal profession, as lawyers look for new ways to manage the efficiency of their workflow. [It is defined](#) as “the discipline of planning, organizing, securing, and managing resources to achieve specific goals...The primary challenge of project management is to achieve all of the project goals and objectives while honoring preconceived constraints. Typical constraints are scope, time, and budget. The secondary—and more ambitious—challenge is to optimize the allocation and integrate the inputs necessary to meet pre-defined objectives.”

Transferring the business-speak of that definition to legal-speak, it applies equally to legal matters. Legal project management has emerged as one of the most effective ways to enhance client value and establish a reliable basis for alternative pricing methods.

[Basecamp](#), [Glasscubes](#) and [Onit](#) are three cloud project management applications that were developed with the functions of a simple client portal, and expanded the communications platforms to allow for full engagement between attorney and client, and among the members of the legal team assigned to a legal matter.

You can calendar events or set deadlines, assign tasks, track your time and monitor the team’s progress. You can also edit documents, save and manage document versions, discuss legal issues, give/receive legal advice, and keep everyone informed of actions or activities in the case.

The functionality of these applications is sufficiently robust to also enable lawyers to perform court coaching and online mediation services via collaboration and document sharing.

## **Document Management Client Portals**

The proper management of electronic documents in law practice, particularly in light of the expenses of eDiscovery, can’t be overstated. An efficient document management system will enable you to find a document quickly, and from several different sources of data within the program (i.e., keywords, case number, client name).

Several document management developers have extended their product to include significant collaboration capabilities using client portals. [Net Documents](#) and [Javek](#) offer rich functionality in document management, collaborative deal rooms or workspaces in addition to messaging interaction and shared scheduling through its client portal. The platform provides sufficient support for the performance of court coaching or online mediation services, adding enormous value to your services.

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[Agilewords](#) offers full editing capability right within their collaboration workspace. [LeapFile](#) is primarily used for large-file uploads, with the capability of document sharing collaboration through a client portal.

## Other Custom Client Portals

Developers have seized the client portal concept to create various interesting uses of the technology. For example, [Impirus](#) and [LexSight](#) offer website construction and marketing services around their portal platform, which includes document sharing functions. [Anagua](#) is an Intellectual Property management software that includes document and email management, and online collaboration capabilities.

## Practice Management SaaS and Client Portals

As you can see, client portal technology enables creative uses to construct customized secure online environments. It facilitates not just ease of communication, but also the ability to broaden your delivery of legal services, thereby enlarging your potential client base. When you combine that with the power of SaaS practice management solutions into one online environment, you have created a virtual law office. It is quite literally the place where all involved will go to participate in the legal matters contained within the environment. But if it is to be that, it must include a client portal to enable client access and interactive communication.

Following is a list of SaaS practice management solutions that include client portals to give you an all-in-one package:

- [Houdiniesq](#)
- [Clio](#)
- [LexisNexis Firm Manager](#)
- [Total Attorneys](#)
- [Direct Law](#)
- [AdvoLogix](#)
- [MyCase](#)
- [Livia](#)

Each of these products offer varying degrees of depth in the functions of a law practice management system, depending on what strengths they want to emphasize. But what they all share is the technology to enable communication and collaboration in a secured environment via a client portal.

A way to enhance the clients' experience is to add access to useful digital applications within your virtual office that will help them think through their issues and clarify their positions. Ask yourself this: what do my clients need to find out that would be awesome if they could do it right there? What would create a "remarkable" experience? By "remarkable" I mean an experience that clients will talk about and discuss and mention to their friends and contacts which becomes one more reason why a new client should select your firm over another.

Some online family law practices, for example, offer clients access to a child support calculator, alimony calculator and a parenting plan wizard. Real estate lawyers include tools such as amortization tables, realtor and mortgage research functions and calculators. Access to these tools helps increase client loyalty and enhances their experience.

## **Document Assembly**

Document Assembly is the design of systems and workflow that assist in the creation of electronic documents. These include the design of logical questionnaires which, when completed, populate a template document to create and deliver an online legal document for a client. On the Web, such a system requires the use of a client portal through which legal advice regarding the document to be created can be given, and the questionnaire and legal document are transmitted.

In the above list of practice management vendors, only DirectLaw includes optional web-enabled document assembly services within the framework of their virtual law office architecture. However, [Wizilegal](#) is a SaaS product that offers document automation technology and delivery via a client portal, in addition to website construction and the option to purchase advanced services such as creating questionnaire questions, reviewing document parameters, or general consulting.

Other ways of capturing client data are online questionnaires that generate answers to questions that can be input into a desktop document assembly. While not as efficient as web-enabled document automation, there are still productivity benefits because the clients is doing part of the work.

## **Summary**

The security of online functions used by attorneys to communicate and collaborate with their clients is of major concern to regulatory authorities, one of the subjects of the ABA's Ethics 20/20 Commission's review of the Model Rules, and at the core of your ethical obligations to insure the privacy of client data, attorney/client confidentiality and maintenance of the attorney/client privilege.

Recently, the United States District Court in West Virginia held that a bank president who emailed his attorney via the company's email system waived his attorney/client privilege, where the company's email policy dictated that all emails sent through their account were considered company property. That is only one of many scenarios that can lead to violations of ethical conduct or waiver of privilege when using online communication tools that are not properly securitized. Use of a client portal is the answer to this challenge.

The eLawyering Task Force is conducting a comparative analysis and study of the various features offered by legal vendors who include client portals in the structure of their SaaS products. The analysis is scheduled to be published in 2012. We are soliciting input from the legal vendors in the industry. The Task Force has also published a set of best practices for law firms that want to deliver legal services based on the concept of the "client portal" application. See: [Guidelines for the Use of Cloud](#)

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[Computing in Law Practice](#) from eLawyering Task Force, Law Practice Management Section of the American Bar Association.

In an article in the September Issue of Law Practice Magazine, [on predictions for the next five years of eLawyering](#), Richard Granat and Marc Lauritsen stated that:

“Larger law firms have been using extranet technologies for years, but few solos and small firm practitioners have incorporated client portals into their websites. Recently, however, the cost of this technology has come within reach of even the smallest firms. Think of a personalized web space for each client, giving the firm an online platform for offering a wide range of functions that ordinarily would be provided by telephone, fax, snail mail or in-person meetings. We predict that within five years almost all law practices will use such a portal.”

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