

Clear winners

Emma Waddingham, Modern Law, caught up with Adam Cheal, Fletcher Longstaff about how the Perfect Portal new business management system has helped the growing firm to win more business online AND achieve (to date) a #2 ranking on TrustPilot UK for conveyancing legal services, thanks to it's high-tech approach to transparent pricing and client care.

ML: We hear you're leading the way in working price transparency into your business strategy, in terms of customer service as well as ensuring you're compliant with the new SRA Pricing Transparency Rule that comes into force in December 2018. Tell us a how you've used Perfect Portal to give your potential customers a true picture of the value of your services, prices and quality of work.

AC: We've been trading for three and a half years so we're still quite a young company but from the outset, it was always my idea to be as transparent as possible. Perfect Portal has been brilliant – although we had looked at other solutions first. I wish we hadn't! From a price strategy point, it makes our life easy. Anyone can get a quote, any time of the day. It also allows us to track and monitor the quoting system so our Ad Word and Google guys can see who is using the software, where and when.

When we first started, around 75% of our work was referred work. We're now around 25% referral based. Almost 50% of our work comes directly from the website - which could still be from the local market but we know a great deal of instructions come from all over the country. We continue to be ranked second place on TrustPilot for legal services – which has some great SEO benefits - and picked up four ESTAS Conveyancing Awards last month – on the back of our three ETSAS in 2017. This all helps to convert clients online.

From a transparency point of view, it's so much easier; I can set up any questions I want on Perfect Portal to capture the information we need. I know lots of lawyers moan that they can't capture everything they need for pricing and quotes but if you take the time to go through your process and ask them

in a way that elicits a yes or no answer, then it works brilliantly. For example, if the client says 'no' to a question then, if the quote needs amending, you have grounds to go back later on to say "if you'd said yes then we would have quoted 'x' originally". We capture as much information as possible on Perfect Portal to ensure the quote is as clear and true to the picture as possible.

ML: What does client care mean to customers; what's the most important part of the process for clients?

AC: That you're not hiding anything. You have to consider the implication of hiding your fees and what this says about you as a firm.

ML: How do you overcome the 'pricing problem' of being transparent before you've seen the work involved?

AC: I know conveyancing is up and down when it comes to client care. We offer banded fixed fees and monitor the work involved for all cases - it works itself out in the end. Some clients don't require need much on the engagement front and others do. While some transactions are harder than others to manage, the files and fees balance themselves out across the year.

ML: You're not keen for a race to the bottom so how do you balance that with transparency and the need to compete?

AC: No, we don't want a race to the bottom! Our client care is now completely digitised. We have a new case management system (VisualFiles) that's fully integrated with Perfect Portal. All our instructions arrive into the CMS instantaneously via Perfect Portal and our client care is managed via Adobe sign. This means we're able to get client care sorted in 24-48 hours, rather than a number of days. Perfect Portal is massively valuable to us to ensure we get all the information and fees straight into the CMS, agreed and set in stone. All the solutions talk to each other and it only took one API key from Perfect Portal to plug this data in.

ML: How do you approach pricing?

AC: We identified our pace of work over the first two years, especially in terms of referred work. Over the last six months, with the shift to self-generating work, we've been able to put our fees up twice as we don't want to be over worked, nor overburden our fee earners. Setting this pace for ourselves ensures we can continue to give the high level of client care we're known for. We have also seen a shift in where people instruct us from – with a bulk of work coming in from the South East. While our fees are higher for Lincolnshire, Sale and the East Midlands, they're not for the South. We know our clients in the South are getting a high quality of customer service wrapped up in comparably lower fees.

ML: How do your fee earners utilise that extra time, gained by the quoting benefits of Perfect Portal?

AC: We don't go home with an email in the inbox; we deal with messages the day they come in so that no-one is waiting for information. We've also built an app with another party that plugs into the CMS and sends push notifications straight through to clients to keep them informed.

ML: Are 'tech natives' more in tune with your brand of legal services?



AC: We've found that younger clients – often 'tech natives' – are great users of apps and online quotation systems, as well as e-signature tools like Adobe Sign. We get some client care back within 30 mins, proving these clients understand e-signatures. This builds a massive amount of speed into our system.

ML: What will happen if firms do the bare minimum in terms of pricing and don't invest in the tech to help them?

AC: We've had to throw a lot of money at technology to stay ahead of the curve. We're not a huge company – there's only 10 of us – but we've invested in what we think is the best tech available to us and keep building. If firms don't start to think and invest in this type of tech – particularly in conveyancing - then they'll be left behind. Clients are picking up on the fact that firms offer these solutions and ways to stay informed so they'll look for firms that offer them. People think an investment in tech is a massive expense but the money we save on printing and post and the admin behind that is huge. Our fee earners are then able to offer so much more in terms of client care.

ML: What's next?

AC: We're working on an app for referrers, to allow our CMS to push information back to Perfect Portal so agents can see more about the work and what's happening. The product is really helping us to develop and enhance our business and the tools that help us. The professionals at Perfect Portal are incredibly easy-going and always quick and happy to help. There's no wait for any changes to be made and we only wish we'd started using it from day one!

Adam Cheal
Managing Director of Fletcher Longstaff.

Perfect Portal is a digital solution which is easy to use, quick to implement and helps firms manage clients while providing complete transparency from quote to completion.

To see how Perfect Portal can help you, please visit perfectportal.co.uk

