

Buyer's Guide:

Choosing the Right Client Experience for Your Law Firm

In the AI Era, It's Time to Stop Using
dumb Tools. Build an **intelligent** firm.

Why This Matters

Since 2018, “client portals” became common—but most remain stuck at v1 standards: browser logins, email/SMS dependance, and little more than digital file cabinets. In 2025, the decision is no longer “give clients a login.” It’s a **client experience** decision that impacts adoption, staff workload, revenue, reputation, and risk. The modern bar is an **intelligent, mobile-first platform** that pairs predictive insights and agentic automation with secure, two-way communication.

Use this guide to interrogate vendors (or your incumbent), separate sales spin from measurable outcomes, and pick a platform that delivers ROI this year—and every year after.

How to Use This Guide

1

Score vendors across seven categories using the questions and impact guidance below.

2

Apply weights (recommended defaults provided) to reflect your firm's priorities.

3

Total the weighted scores to see which option delivers the greatest business impact.

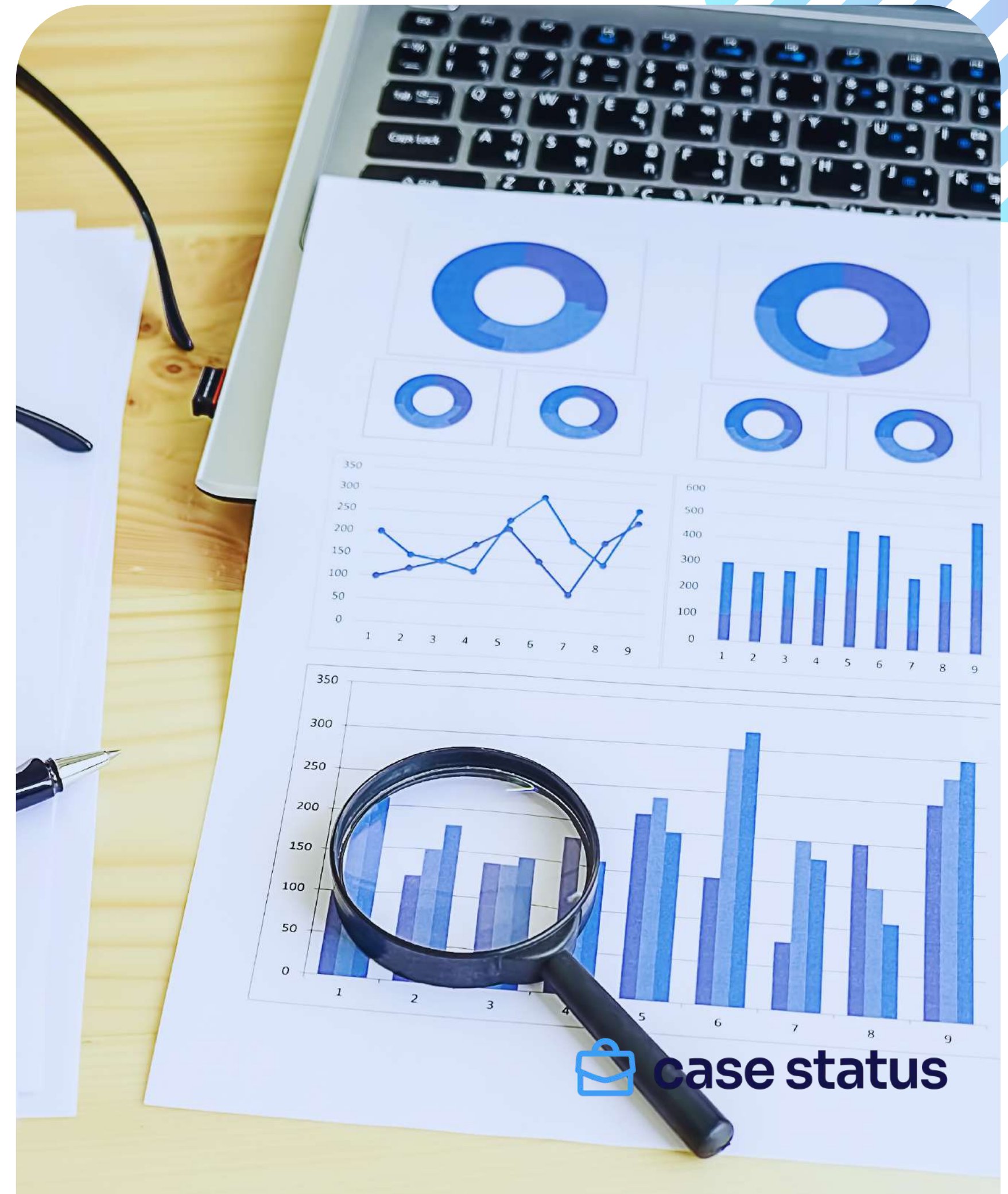
4

Attach proof: require dashboards, live demos, benchmarks, and customer references—not anecdotes.

Evaluation Framework

Each category includes:

- Definition
- Recommended Weight
- Questions to Ask Vendors
- Impact Guidance (*what “good” looks like and why it matters*)



1 Client Experience & Adoption

Recommended Weight: 15-20%

Why it matters

If clients don't adopt, nothing else works. Low adoption fragments comms across SMS, email, phone, and a portal almost no one uses.

Questions to Ask Vendors:

- What percentage of clients adopt and consistently use your platform? Benchmarks by practice?
- Is there a native mobile app (iOS/Android)? What are App Store ratings/reviews volume?
- Does the solution depend on a web browser or deliver push-notification workflows in-app?
- Is in-app messaging synced to the CMS, or do you rely on email/SMS as primary channels?
- How do you minimize login friction (password resets, deep links, built-in 2FA)?
- Which client tasks are supported in-app (video feedback, checklists, appointments, treatment tracking, translation, doc scan/upload)?

Impact Guidance

- Target 80%+ client adoption with 4.9★ app ratings and thousands of reviews.
- Browser-only portals typically stagnate near ~30% adoption → chaos persists across channels.
- High adoption unlocks automation, faster response times, fewer calls, and higher satisfaction.

2 Staff Efficiency Gains (ROI)

Recommended Weight: 15-20%

Why it matters

Time is money. The platform should eliminate manual updates, reduce inbound calls, and prioritize work with AI—producing a compounding efficiency dividend.

Questions to Ask Vendors

- Annual hours saved per firm (by size)? Show the time-saved dashboard and methodology.
- Median response time benchmarks via the platform. Is messaging native or in email?
- Does AI triage incoming messages, detect urgency, and draft on-brand replies for review?
- One-click case summary with predictive sentiment and next-best actions?
- Quantified call reduction and manual update reduction (% + hours)?
- Typical payback period and verified ROI studies? Examples of staff redeployed to higher-value work?

Impact Guidance

- Aim for ~90-day payback and 1,300% ROI.
- ~80% fewer manual comms; 1,300+ hours saved/year (often worth ~\$500K in labor at scale).
- Demand specific, verifiable metrics—not anecdotes.



3 Client Satisfaction (NPS & Feedback)

Recommended Weight: 15-20%

Why it matters

Satisfaction is the engine for retention, referrals, and reviews. Generic “pizza tracking” portals can’t measure or improve it.

Questions to Ask Vendors

- Benchmark NPS across firms; trend data by practice and lifecycle stage.
- Is feedback automated at milestones (onboarding, major updates, resolution)?
- Can staff view client-level timeline of NPS, plus firm-level trends in a single chart?
- Do you capture real-time sentiment and trigger follow-ups on low scores automatically?
- Examples where improved CX → referrals/reviews/retention.

Impact Guidance

- Expect lifts from ~20 to 80+ NPS (world-class) and 2× referrals / 8× reviews.
- Close the loop: low scores auto-flagged, assigned, and tracked to resolution.



4 Revenue Impact (Referrals, Reviews, Retention)

Recommended Weight: 10-15%

Why it matters

Your happiest clients are your cheapest growth channel. The right platform turns satisfaction into measurable revenue and protects at-risk cases.

Questions to Ask Vendors

- How do you mobilize promoters into reviews/referrals automatically and at the right moments?
- Do you infer satisfaction from behavior/metadata (not just surveys)?
- Do you track Google reviews volume/ratings and attribute revenue to them?
- Evidence of new annual revenue generated and revenue protected via churn prevention.

Impact Guidance

- Look for 8× more positive reviews, \$144K+ in new revenue/year, and ~\$192K protected.
- In-app review prompts at wins/resolution; structured, trackable referral workflows.



5 Security & Compliance

Recommended Weight: 10-15%

Why it matters

Security is an ethical and business imperative. Email/SMS are major breach vectors; firms need encrypted, app-based channels with verified compliance.

Questions to Ask Vendors

- SOC 2 Type II, HIPAA, GDPR certifications and audit reports? Terms around data protection?
- Do you rely on SMS/email for primary comms, or provide end-to-end encrypted in-app messaging?
- Built-in 2FA vs. browser usernames/passwords? Data residency/jurisdiction? Incident response?

Impact Guidance

- Treat SOC 2 Type II + HIPAA + GDPR as table stakes.
- Prefer end-to-end encrypted mobile channels; minimize SMS/email exposure.



6 Integration & Scalability

Recommended Weight: 10-15%

Why it matters

If it doesn't fit your CMS and workflows, adoption collapses internally—no matter how slick the client UI is.

Questions to Ask Vendors

- Depth of integrations (contacts, docs, phases, tasks) with Clio, Filevine, Litify, Neos, MyCase, SmartAdvocate, etc.
- Bi-directional write-back? Bulk invites/mass updates? Multi-practice support (PI, immigration, family, mass tort)?
- Enterprise scale track record (clients served, uptime SLAs). Chrome extension/embedded tools to reduce staff change-management?

Impact Guidance

- Expect deep integrations, bulk onboarding, and reliable scale to 1,000+ clients simultaneously.
- Automatic write-back and lifecycle triggers that “just work.”



7 Strategic Partnership & Focus on Client Experience

Recommended Weight: 10-15%

Why it matters

You're choosing a partner, not just a product. Focus drifts (e.g., into intake/marketing) erode innovation in client experience.

Questions to Ask Vendors

- % of roadmap and R&D devoted to AI for client experience vs. tangential areas.
- Build vs. white-label? What's shipping now vs. futureware?
- Customer success maturity: who drives adoption, NPS, ROI post-go-live?
- Concrete examples of predictive NPS, sentiment, proactive updates.

Impact Guidance

- Look for a clear, consistent CX mission, not a feature grab.
- Success measured by adoption, NPS, ROI—not by how many add-ons were sold.





Red Flags to Watch For

- “We send emails and texts because that’s what clients want.” (Security risk + low adoption)
- “We integrate with everything” (but no proof of write-back or scale)
- Demo heavy on future features; light on live dashboards and benchmarks
- “Surveys when you remember to send them” (no milestone-based automation or closed loop)

Proof Pack to Demand Before You Buy

- App Store rating snapshots and adoption curves by practice area
- Time-saved dashboards; inbound-call-reduction trend lines
- NPS lift before/after; sentiment alert examples and resolution SLAs
- Review/referral conversion funnels and revenue attribution
- Compliance reports (SOC 2 Type II, HIPAA, GDPR) and incident response playbook



Implementation Readiness Checklist

- Executive sponsor, CX owner, and success metrics defined (adoption, NPS, call reduction, ROI)
- CMS connection validated in sandbox; test bulk invites and write-back flows
- Staff enablement: playbooks for triage, templates, and next-best-action usage
- Client rollout plan: staged cohorts, milestone feedback, review/referral prompts

Key Takeaway

The winning solution isn't a portal —it's an **intelligent client experience platform that:**

- Drives 80%+ adoption
- Saves 1,300+ staff hours/year
- Converts CX into referrals, reviews, and retention
- Delivers NPS 80+ with closed-loop feedback
- Meets enterprise compliance standards
- Uses AI & automation to be predictive and proactive

Score vendors against these criteria, attach proof, and let the numbers make the decision.



Closing Thoughts

Choosing the right client experience platform is one of the most strategic technology decisions your firm will make in the AI era. This is not about checking boxes on a feature list—it's about ensuring your clients feel cared for, your staff are empowered, and your business can scale with confidence. The firms that thrive will be those that abandon yesterday's "dumb tools" and embrace intelligent systems that actively drive satisfaction, growth, and trust. With the right choice, your platform becomes more than technology—it becomes a lasting competitive advantage.

Ready to compare head-to-head?

[Book A Demo](#)