

## Use Case – Legal Firms

Legal firm transforms client service, operational efficiency and compliance with call analytics, recording and AI conversation analytics.

### Situation

With tough competition, hybrid working the norm and rising client expectation, legal firms need to differentiate their client service, improve productivity and manage risk more effectively. The firm needed a better understanding of client communications to prioritise conversations in line with deadlines and respond to new enquiries. Client privacy and security is of utmost importance, as is the ability to identify and act on any high risk conversations. In addition, a log of communication activity is needed to support accurate billing.

### The Solution



Call analytics dashboard views provide insight to understand client behaviour, call patterns and end to end call journeys. Improved visibility is helping the firm to prioritise VIP and urgent calls, as well as triage routine calls to reduce response times, wasted resource and frustration.

**Missed calls are quickly identified and returned to minimise lost opportunity and client dissatisfaction.**

Client bills can also be verified by itemising client interaction.

Both external and internal conversations are recorded and stored in a tamper proof environment to keep client data safe. Specified clients have been excluded from recording policies where permission to process their data has been denied. Partners are able listen to their own conversations to check on the detail and avoid costly mistakes. Selected managers have additional permissions, allowing them to securely share recordings when resolving disputes.

Using conversation analytics, every conversation is transcribed to create a secure and searchable database of communication activity.

**High risk conversations are highlighted using sentiment and topic matching for further investigation.** Real time notifications enable the compliance manager to review any malpractice or regulatory concerns in the moment to mitigate risk.

Looking ahead, the firm is planning to extend the use of conversation analytics to identify clients at risk of cancellation. They're also considering the use of AI evaluation to optimise client outreach and on-boarding, whilst monitoring adherence to critical client protection laws.

