Cloud Forms Client Collaboration

Transform your forms library into a collaboration tool that saves time, reduces cost and provides a more efficient client service

Client behaviours and expectations have been changed by digital technology. With new ways to communicate, modern legal consumers want to be a part of matter progression in order to ensure timely completion. One way to meet these expectations, is for fee earners to complete required forms and documents as quickly as possible.

Efficiency barriers

An obvious solution for faster completion is to enable clients to complete forms where they have, or can access, the information needed. It's much more efficient than a fee earner getting the data via a telephone conversation or email and then re-keying it following the event. Unfortunately until now, the issues concerning insertion of the correct information, along with data security concerns, have made this simple procedure unwieldly and subject to risk.

Some firms have attempted to manage the process by posting forms but that's a slow, inefficient solution and one that is impractical when remote working. Others have emailed forms, in Microsoft Word or PDF format. This is not always successful because if clients are using a non-Windows tablet, compatibility issues can deconstruct document formatting.

An even larger issue is the reliability of captured data. Word forms can't be predictably locked in a static form context. This means solicitors cannot be sure the client hasn't edited something that they shouldn't have, with changes to mandated legislative wording being of particular concern.

Introducing forms sharing efficiency

Now, with new Cloud Forms functionality, our Client Collaboration module provides a digital communication channel that's an ideal solution for both your firm and your client.

This new platform allows fee earners to share legal forms directly, and securely, with clients or relevant 3rd parties. All the recipient requires to receive the form is an email address and a browser.

The solicitor simply selects the required document from their forms library and completes any fields that are required to start. They can choose to limit the content that the client can edit, or allow them to fill in the entire form. They can also include usage instructions to help the client complete the form easily. When ready, an email is sent to the client, containing a direct link to the form.

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Protected, secure transmission

In a separate email or text message, the solicitor shares a password that the client will require to open the form. They can choose this password or allow Cloud Forms to automatically generate one for them.

Access is controlled by the fee earner, who chooses the form's usage time limit. Clients can access the form as many times as they need to within the duration specified. When this time period ends, access to the link will expire. If the form is not completed, the solicitor will be automatically notified of this.

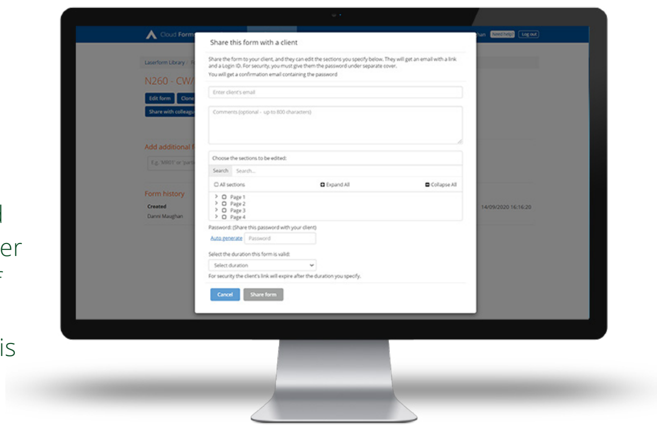
The client simply adds the required information to the form and when saved, the fee earner will receive notification that the form has been completed and is ready to be retrieved.

Measureable advantages

Allowing clients to self-complete forms means fee earners spend less time filling in forms and more time on critical tasks. It also delivers faster matter completion, resulting in higher levels of client satisfaction and repeat business. These measureable benefits are both delivered by this simple, yet innovative, communication tool.

Key benefits

> Easily share a form with any authorised external party
> Spend less time re-keying data
> Speed up transaction time
> Secure transmission, password protected
> Fee earner controls fields a client can edit
> Automatic form completion notifications to reduce time spent chasing
> Available on all subscribed forms
> Efficiency solution for remote workers
> Measureable ROI



If you would like to add Client Collaboration to your Cloud Forms package please contact your Account Manager or speak to our Customer Care Team

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