



# Guided Passage

The Evolving Law Firm Website & Digital Client Journey

**Marketing Partner Forum • 19 January 2022**

# Introductions

**Yolanda Cartusciello**

*Partner, PP&C Consulting*



**Kalev Peekna**

*Chief Strategist, One North*



# The Situation

Some uncontroversial (?) observations:

- Law firm websites have seen little *real* innovation in the last 5-10 years
- The pandemic made everyone's digital experience more important – and that's not likely to revert post-pandemic
- “How well is our digital experience performing?” is not always an easy question to answer
- Most marketers are a step removed from the work of their firms (i.e., what the clients experience)

# The Challenge:

The #1 obstacle to digital innovation is not understanding the role digital plays in your client journey / experience

# Everyone is suddenly talking about the “experience”

Across industries, both B2C and B2B, businesses are now looking to their customer experiences for opportunities to differentiate themselves, gain market advantage, and find relief from the never-ending pressures of commoditization and price compression.

# 89%

of Marketers expect to compete on the basis of the customer experience

Source: Gartner CMO Survey, 2019

# 72%

of IT leaders identified “Improve Customer Experience” as a top goal for DX (Digital Transformation)

Source: TEKSystems, 2020 State of Digital Transformation

## But what is customer/client experience?

In the vendor landscape, you'll find three different kinds of advisors:

### CX as BRAND

---

Brand/design agencies tend to focus on design, communications, and long-term emotional attachment (i.e., loyalty) to expand their impact.



### CX as CUSTOMER SATISFACTION

---

Traditional customer service or data measurement providers emphasize optimization, but offer little guidance with respect to innovation.



### CX as UX/DX

---

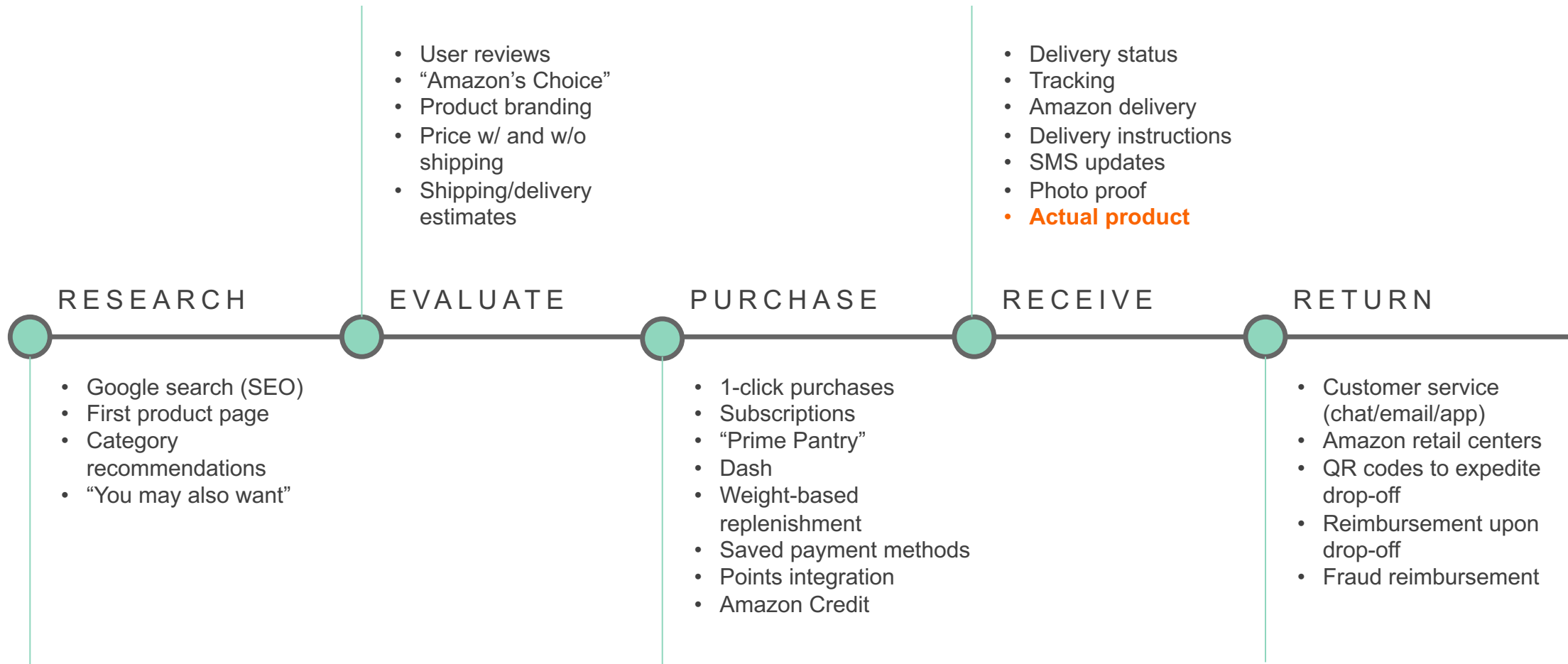
Larger integrators, consultancies, and digital strategy providers often recast existing advisory offerings as "CX," focusing less on design.



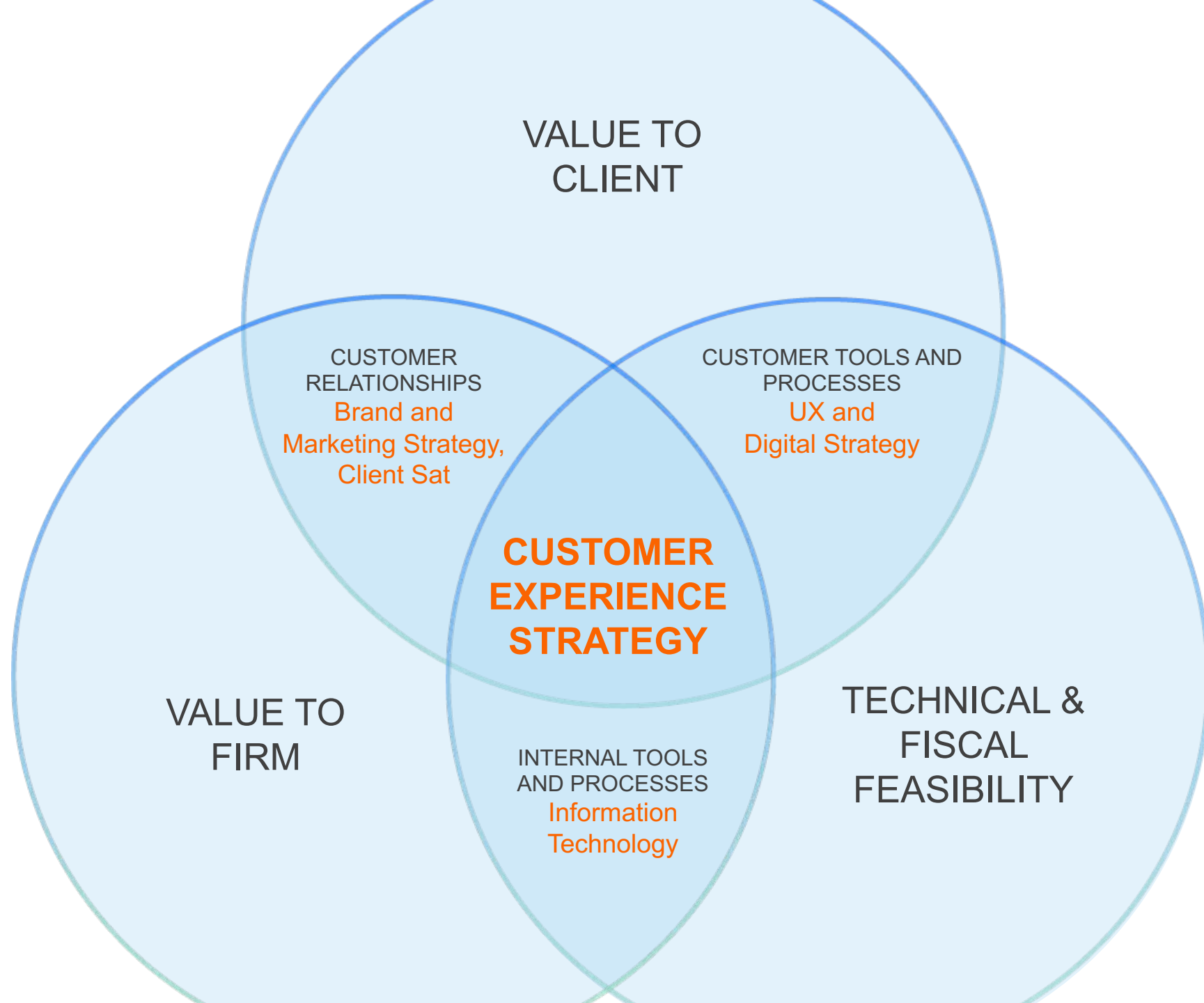
# amazon

The Amazon logo, featuring the word "amazon" in a dark blue, sans-serif font. Below the text is a thick, orange curved arrow that starts under the 'a' and points towards the 'n', resembling a smile.

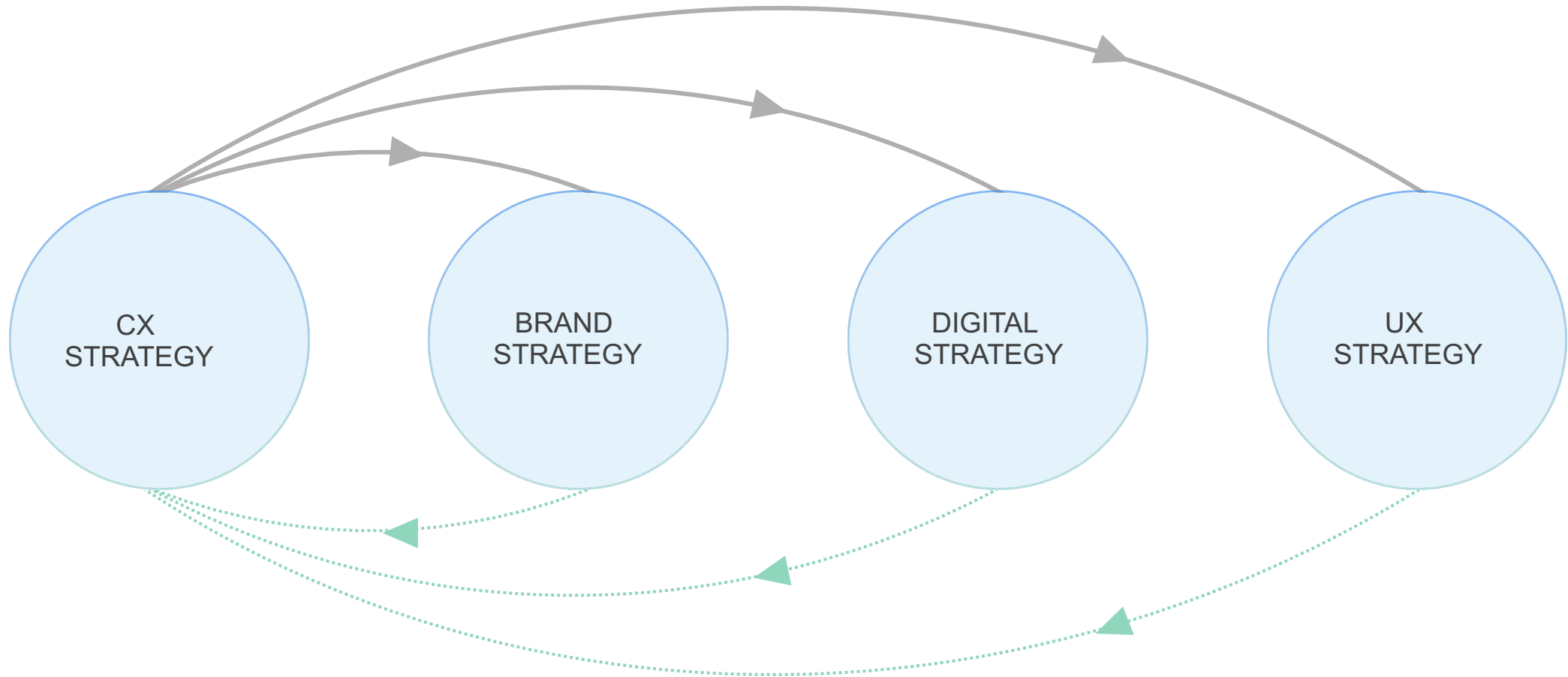
# The Amazon customer experience — B2C retail



How can a strategy for something  
so broad — CX as “all of it” — be  
**meaningful?**



## CX Strategies often reveal Brand, UX, and Digital Strategy needs\*

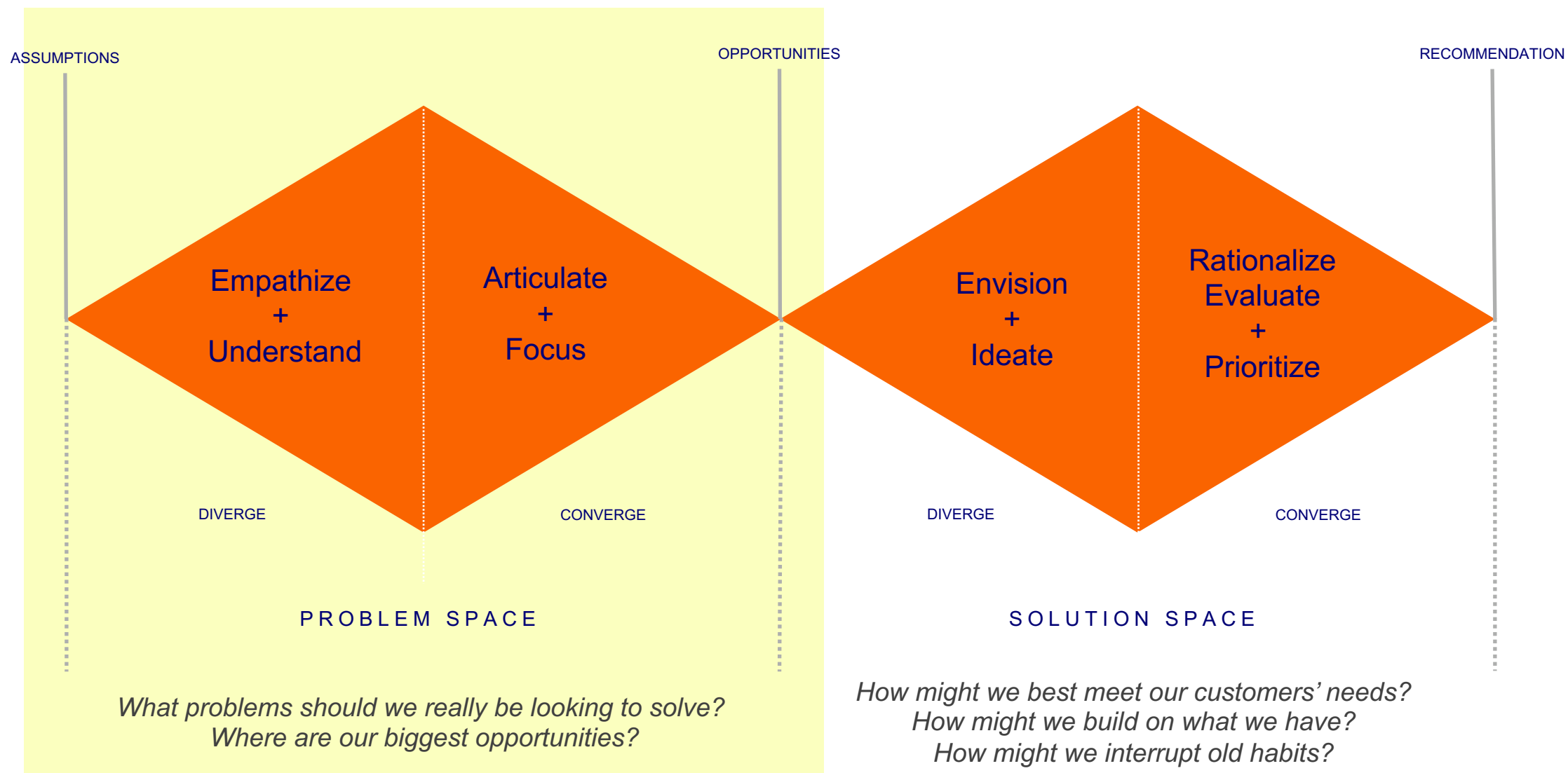


\* Brand, UX, and Digital Strategy efforts can also reveal a need for [further] CX Strategy work

## 6 steps to innovating your client experience

- 1) **Get to know our stakeholders** and their thoughts on and goals for their relationships with their clients, and do some baseline investigation of the internal tools and processes
- 2) **Get to know the stakeholders' clients**, and learn about their relevant—and sometimes not so relevant, but illuminating—needs and frustrations
- 3) **Distill what we've heard into key learnings and opportunity areas**, often accompanied by journey maps of clients' current experiences
- 4) **Generate ideas**, imagining new possibilities for or in support of client interactions
- 5) **Sort, group and prioritize these ideas** into a recommendation and plan
- 6) **Engage our stakeholders throughout the process** to inspire with respect to future possibilities, and to build internal buy-in and momentum

# Grounding the innovation & recommendations



# What this Work Looks Like (Outside Legal)

# The Future of GreenPoint Ag's Customer Experience

For a 1:1 walkthrough of GreenPoint Ag's CX journey,  
reach out to [kpeekna@onenorth.com](mailto:kpeekna@onenorth.com).



# What this Work Looks Like (Inside Legal)

# Client Experience Diagnostic Tools



# The Client Experience – The Issue in the Legal Industry

“The siloed nature of service delivery and the insular cultures that flourish inside the functional groups that design and deliver service” can affect, impede and even undermine the client experience and the long-term relationship with the client.

“*The Truth About Customer Experience*”  
*Harvard Business Review, September 2013*



# Digging Deeper

## Offerings



## Functional Elements of the Experience

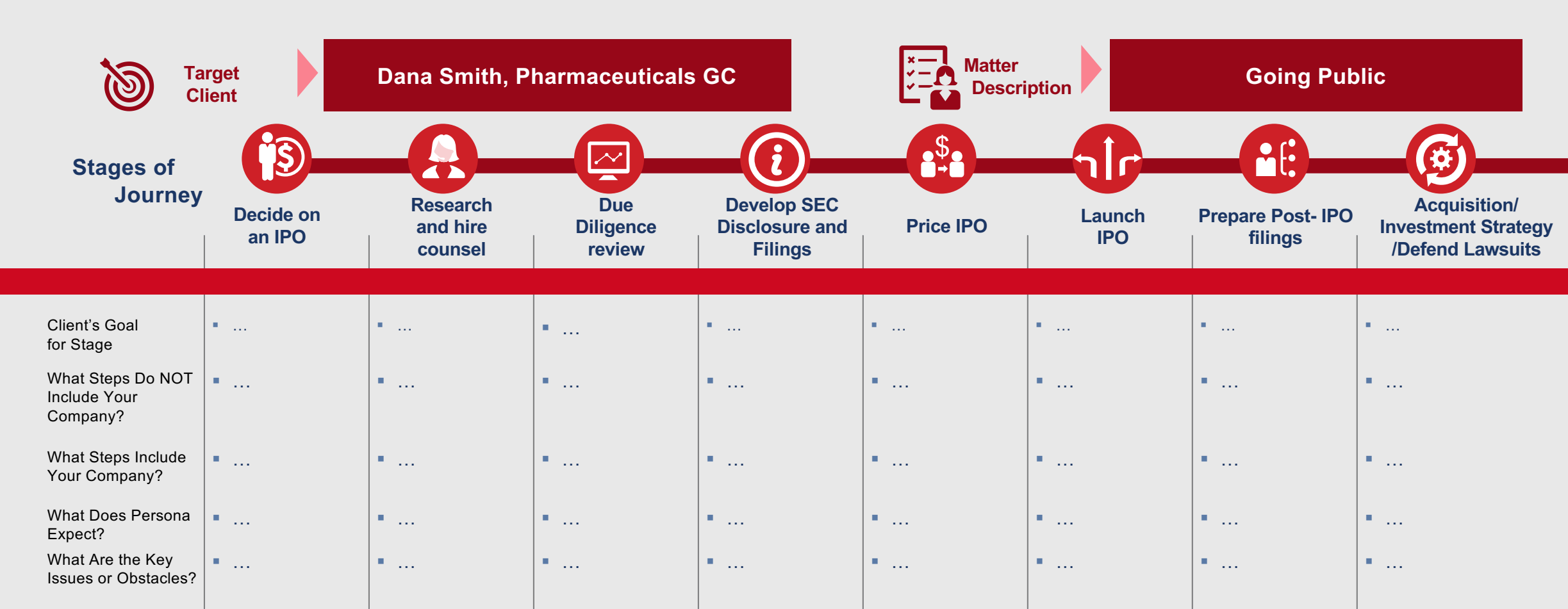


# Going Public – A Specific Client Journey

## Stages of the Journey



# Example of a Journey Map for Legal



## Offerings

Commercial  
Litigation



White Collar



M&A



Securities  
Offering



Tax Advice



Employment  
Counseling



Industry  
Expertise



The Client  
Experience



## Functional Elements of the Experience

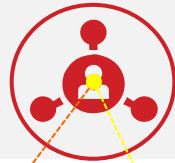
Partner  
Interactions



Associate  
Interactions



Support Staff



Technology



Billing and  
Collection



The Client  
Experience



## Stages of the Journey

Journey  
Stage

Research  
forms of  
capital  
raising

Decide on  
an IPO

Research  
and hire  
counsel

Due  
diligence  
review

Develop  
SEC  
Disclosure  
and Filings

Price IPO

Launch  
IPO

Prepare  
Post- IPO  
filings

Consider Acquisition  
and Investment  
Strategy

# THIS MIGHT SEEM LIKE A NON-SEQUITOR

Menu



Search the menu

Advance Care Planning

## Billing

Account Summary

Estimates

Billing Inquiries

Billing FAQ

## Insurance

Insurance Summary

Coverage Details

## Sharing

Share My Record

Share Everywhere

Link My Accounts

Lucy

## Resources

Research Studies

NYU Langone  
Health MyChart



Log out

## Estimates

### Prepared Estimates

These estimates have been confirmed or prepared for you by our staff. Select an estimate for more details.

ESOPHAGOGASTRODUODENOSCOPY  
WITH BIOPSY

\$700 (your estimated payment)

NYU Tisch Hospital

Reference #814241

Created 1/3/22

View letter

Dismiss

View Summary

Gastroenterology,  
Hepatology

Emily Martorano,  
RD  
Dietitian, Registered

See provider details and manage

## FUNCTIONAL ELEMENTS

Partner Interactions



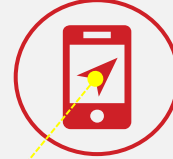
Associate Interactions



Support Staff



Technology



Billing and Collection



The Client Experience



## STAGES

Journey Stage

Research forms of capital raising

Decide on an IPO

Research and hire counsel

Due diligence review

Develop SEC Disclosure and Filings

Price IPO

Launch IPO

Prepare Post-IPO filings

Consider Acquisition and Investment Strategy/Defend Lawsuits

## TECHNOLOGICAL SUPPORT FOR A BETTER JOURNEY



Virtual Meetings; Taking Clients Through Journey of IPO with checklists; videos available on website and/or portal

Coordinated Support in delivering services as well as developing journey materials

Online support (library/km) including client-specific opinions and proprietary database

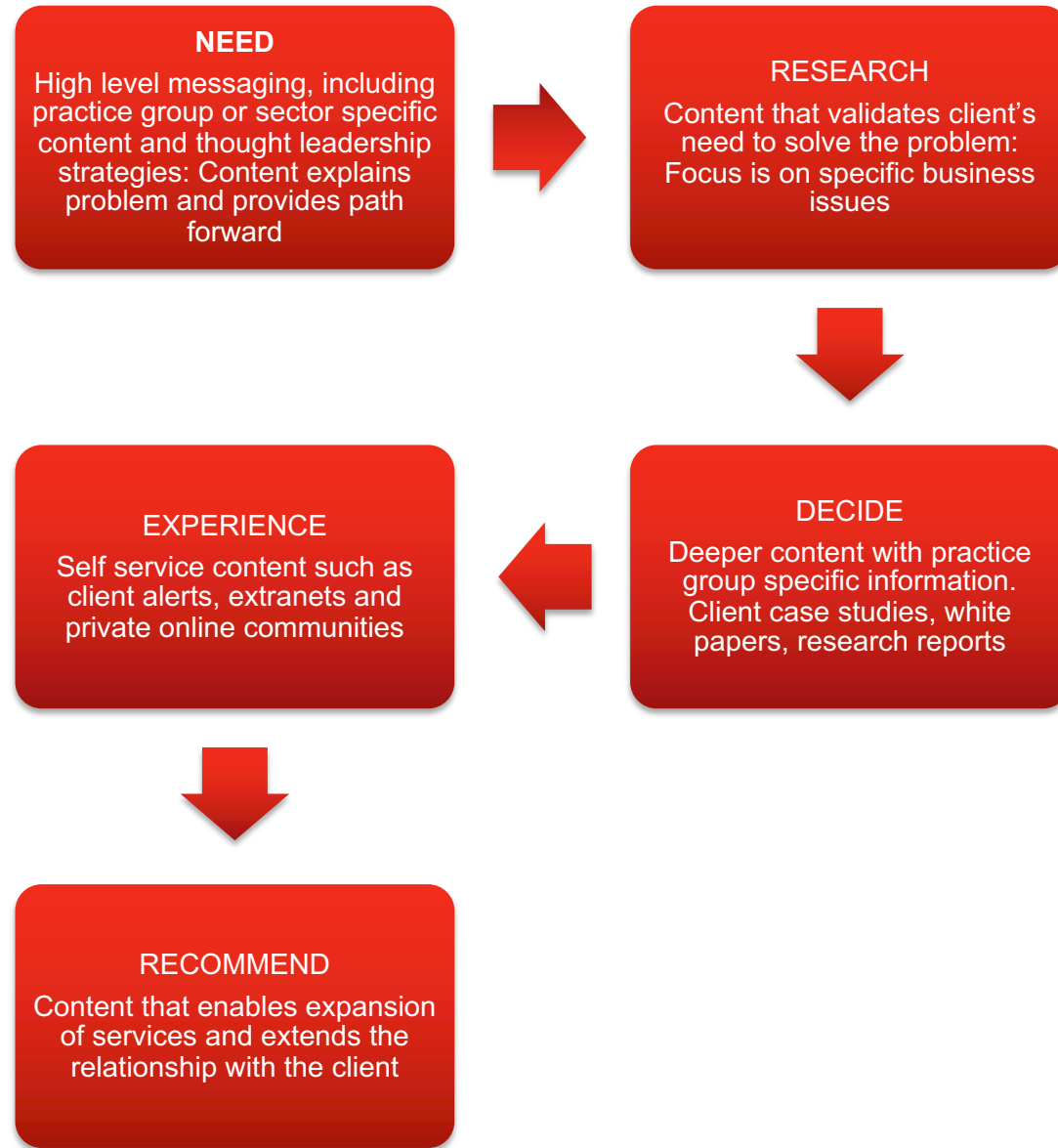
Client Portal with relevant content on external website; proper interaction between private and public digital experience

Online Access to Real-time Run Rates Against Original Estimates

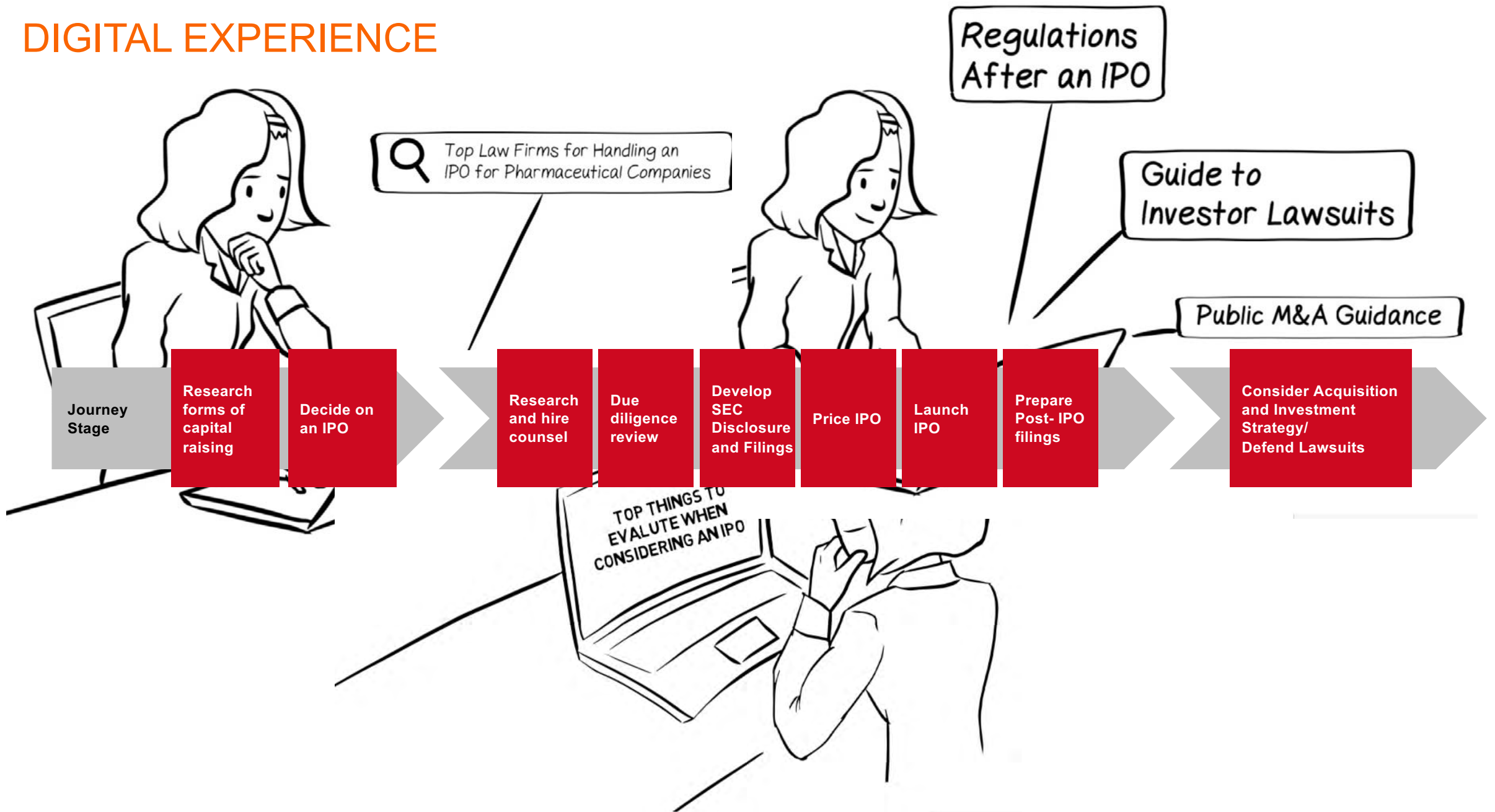
The Client Experience

# The Right Content to the Right People at the Right Time

- Content needs to be personalized to clients in order to best engage with them and help ensure that they receive the content that they want and find valuable *when they need it*.
- By using marketing automation and analytics tools to track and analyze the client journey, law firms will be able to support the lawyers' efforts to provide best-in-class experience.



# DIGITAL EXPERIENCE



# Thank you!