



**The 5 Keys To**

# Selecting A Live Receptionist Provider

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# Executive Summary

The expectations of consumers are very high when it comes to getting information. Most of us can learn just about anything with a simple Google search. But when it comes to legal advice, consumers want more. When a consumer calls a law firm, they are not interested in going directly to voicemail and then waiting for a return call. They are expecting to speak to someone.

So, what do you do when having a dedicated receptionist on staff is no longer a viable option? We all know the cost of a full-time employee can be more than a firm should pay and backing up a full-time receptionist when they are away from their desk or on vacation can add up in both direct costs and the cost of having errors at the front desk. Having a non-receptionist fill-in for them can lead to poor quality and, often times, missed calls.

The live receptionist industry has ballooned into a multi-billion-dollar industry, which has led to many “not-so-good” entrants into the industry. Studies show that 80% of callers who reach a voice mail first when calling a law firm will not leave a message, resulting in lost revenue opportunities. So, finding a live receptionist provider that is best for your law firm is very important.

In this article we will focus on 5 keys to evaluate when selecting a live receptionist provider for your firm. In no specific order we will share insights on what to look for in the providers contract, the quality of service, their mobile app offering, price versus cost, and what a quality set-up should look like.

# Contract Issues

***We will start with contract issues because it is easy to determine a provider's contract terms.***

If, after a cursory review, the terms are unacceptable, stop evaluating the company and find another provider. You should always have the flexibility to port your phone number away from the provider, even if you are in default of the agreement with the provider. Unless you get it in writing, the provider may refuse to release a phone number once they have it in their system. Once they port the number into their system, they own the rights to it. You spend too many resources to take a chance that the phone number that you market to potential clients will not always remain with your firm. Stay away from any provider that will not put this requirement in writing.

As with any fast-growing industry, there are many new providers to choose from. Having confidence that they will be able to set up your company at the beginning of a relationship is important, but make sure they are able and willing to assist with a smooth transition if/when you decide to change providers. Believe me, even great companies occasionally lose clients and you need to know, regardless of the reasons you are leaving, the provider will work effortlessly to make sure you experience a smooth transition. You do not want to have your phones down for an extended period of time because the provider you are leaving didn't port your numbers correctly or they are not returning your calls due to not caring about a past client or because they went out of business.

It's important to have something in writing that states you have a claim to your phone numbers should the provider go out of business. Most credible companies will even have references from past clients that exited for one reason or another. Also, be sure to confirm how long you will have access to save and export voice messages during your time as a client, as well as once you decide to change vendors. At a minimum providers should provide this access and assistance to export voice messages for 30 days after you cancel their agreement.

Verify how each provider invoices for services. Make sure they do not round minutes for receptionist time up. For example, if the receptionist was on the phone with a caller for 2:41 minutes, their billing should not round that up to 3 minutes. This may seem like a small cost, but for a busy firm, this can quickly add up to a material expense. Unless you are receiving a discount, go with a month-to-month program. This provides you will flexibility if you are not happy with the service or if the direction of your firm changes. It also, helps keep the provider accountable.

# Quality of Service

***The industry has been around long enough that the reputable companies have been able to expand their service offerings, as well as develop a quality team of receptionists.***

The person answering your phone is representing you and your law firm. You don't want someone that is unhappy at their job affecting how your callers are greeted. Yes, we all go through moments when we aren't at the top of our game. But a great company will have systems and programs in place to help their employees be happy with their work. Every company's marketing material will highlight how they will save you time, money, and possibly increase the amount of business you win each year. Make sure they are also promoting the well-being of their employees, especially those that will be talking with your clients.

Finding a provider that takes great care of their employees is usually a great way to make sure the services you receive from that company are the best. There are many articles on employee resources to get a glimpse at what is important to today's workforce and having a competitive salary is just a starting point. Employees are looking for flexibility in their work schedules, affordable, yet comprehensive healthcare, and many other non-salary perks. It takes a special person to be a professional receptionist, so make sure the provider you sign on with understands how to motivate their team members.

Where are the providers receptionists located and what are their working conditions? If your clients know you as a midwestern law firm, do you want a team of receptionists with a New York dialect answering your phones? For many law firms, this is not a concern, but it's always a good practice to understand from what part of the country or world your receptionists will be answering your calls.

Finally, what type of ongoing training programs does the provider offer to their receptionists? Do they have development programs that train their receptionists to handle a frantic client or teach them to remain calm during a tense caller conversation? Your clients will often call an attorney when under stressful circumstances. You want the person representing your firm to understand this and speak with your callers appropriately.

# Mobile Application

***Most of us are working remotely at least part of the time. It may be while traveling for business, pleasure, or you've made working from home part of your regular routine.***

Generally, it's a sound business practice not to give out your personal cell phone number, or home address for that matter. It's even more important to make sure the attorneys and staff members working for you are not giving your clients their cell phone number. The alternative to paying for and carrying around two cell phones, is to take advantage of an app that emulates your desk phone. It has taken a few years, but the technology behind these apps has improved to the point that the desk phone app is an excellent solution for remote working.

The basic premise behind the desk phone app is that you are able to use your cell phone to make calls from and have the caller ID come up as if it were coming from your office phone. You are also able to check voicemails, initiate video calls, set your availability, change call handling instructions and instantly communicate with team members. Not all phone apps are easy to use however, so ask to test drive the app before making a long-term commitment. Of course, if you go with the month-to-month offering, you will have the opportunity to use the app without any long-term commitment.

# How It Should Work

***The set-up of phones and live receptionist for any reputable provider will be seamless.***

The biggest area of concern is making sure the provider communicates effectively with your existing provider and coordinates porting your phone numbers over. Depending on the carrier this process can take anywhere between a day to a week or more. However, as long as your existing provider agrees to forward your phone numbers to the new provider until the port goes through, you should be able to start with the new service immediately.

The next step is to set up your phone scripts detailing how you want the receptionist to answer your phones. Depending on the type of law you practice and the nature of the calls to your firm, you may elect a very simple answer script or a script that includes multiple forms you need completed based on the reason for the call. If you will have the receptionist answer frequently asked questions you will want to provide these to the provider so they can upload them up in their phone answering software. It's a good practice to go through this process in detail during the initial set-up, then make a few test calls to make sure they are handling callers the way you want.

The final step in the process is to set up a phone directory for your firm. Even if your new provider will answer calls 24/7/365 it is a good practice to have a firm directory set up, 1) in case something happens and the receptionist service is unable to answer calls, you want to make sure it is easy for callers to leave you a message, 2) when someone in your firm is not available, the caller has the option of leaving a message with the receptionist or on voicemail, whichever they prefer, 3) having a firm directory puts technology to work for you by having voicemail boxes set up for various departments such as human resources, account payable, and accounts receivable. Not only is it easier to prioritize call backs or even have the receptionist return phone calls, it gives your firm credibility that comes with size, even if you are practicing on your own.

# Price Versus Cost

***Cost benefit is an analysis of the pros and cons of a given situation or course of action to determine how the downsides compare to the upsides.***

Chances are if you are reading this you have already given thought to the benefits of having a professional live receptionist provider handle your phone calls. Everyone will have slightly different reasons for using a live receptionist to answer calls, such as time saving features like filtering robocalls, coordinating new client in-take or appointment scheduling. For others the need to be flexible and combine their phone system with live receptionist and having a firm directory are important. Whatever your reasons, even with the incredible rate technology is advancing, the need for person-to-person conversation is not disappearing. In fact, having a live receptionist greet your callers helps you stand out from most other law firms.

Due to the explosive growth in the live receptionist industry, a competitive landscape has emerged. Because of this, the top tier live receptionist providers will have pricing structures that are very comparable. If you have found a provider that is promoting a much lower rate than the average, you need to question the quality of service they will be able to provide. All live receptionist providers have one primary cost driver and that is the compensation to the receptionists that will be representing your firm to your callers. This is an example where the price you pay for a service will be directly related to the quality you will receive. The best receptionists, those that will make your clients feel they are with the best law firm, are worth paying well, with all the benefits and perks necessary to help them enjoy a work/life balance.

To complete an analysis on the value of having a live receptionist answer your calls, first you need to select a lifetime value for each client. To give an example, let's consider a firm that specializes in estate planning and the average lifetime value of each estate planning client is \$6,000. If you are going to be paying your live receptionist provider \$500 each month, you will need to feel comfortable that the provider will help you win one client each year to justify their cost. That should not be a stretch since it is estimated that calls to businesses are expected to exceed 180 billion annually by 2025 and 80% of callers who first reach a voice mail will not leave a message.



# Summary

*Consumers have come to expect instant access to information and results, especially when they have legal matters to discuss. If they have a bad first experience there is a very good chance you will not have a second opportunity to win their business so making that first impression of your firm a positive one is extremely important to growing your law practice. Finding the right live receptionist provider for your law firm can have a direct impact on your annual revenues.*

The first step in evaluating a live receptionist provider is a cursory review of their agreement. If they are not willing to add language that states they will port your numbers if you leave, even if you are in default, there is no reason to consider the provider any further. Your firm's phone numbers are too important to not have this requirement in writing. Every live receptionist provider's largest expense is the cost of the person answering your phones. Look past the marketing materials that state how great they will be for your firm and make sure the provider is taking great care of their people. It is the employees that will determine the quality of service your callers will receive. If you come across a provider who's charging substantially less than the average provider you are finding in the market, dig deep into understanding how they are taking care of their people before moving forward. This industry is a great example where the cost you pay is very likely to be reflected in the quality of service you receive.

The industry has advanced quickly over the past few years and all providers should include a phone app that will emulate your office phone and allow you to make calls from your cell phone without giving out your cell phone. Take advantage of the phone app and all the features available with it.

The onboarding process will be relatively easy with the top-tier providers. You need to make sure the exit process will be just as easy. At some time in the future, you will make a change and you need to know that the provider you are working with will assist in making you exit as smooth as possible. If it is going to take some time to get your numbers ported, make sure they are willing and able to transfer your numbers while you wait for the port to go through.

Finally, if you are practicing law, you are not in the business of managing a phone system and staffing that system with one or more receptionists. An industry of professional receptionists has emerged, who provide excellent customer service at a fraction of the cost of having your own phone system and receptionist. There are several excellent choices to choose from. Be sure to review the terms & conditions carefully and be sure you always have control of your phone numbers.