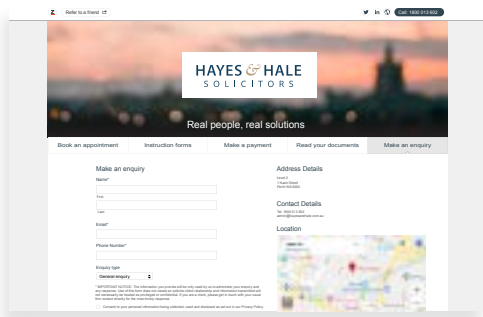




YOU HAVE A SERVICE PORTAL, WHAT'S NEXT?

Congratulations, your Service Portal has now launched and it is time to get your staff and clients on-board.

Get started with these few simple tips:



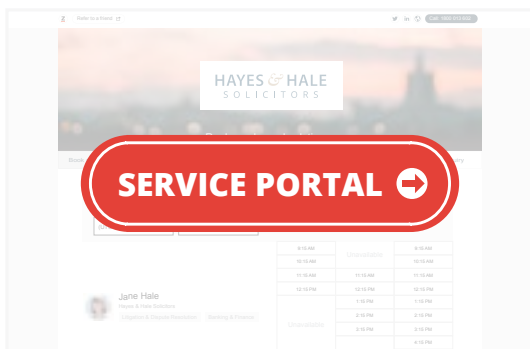
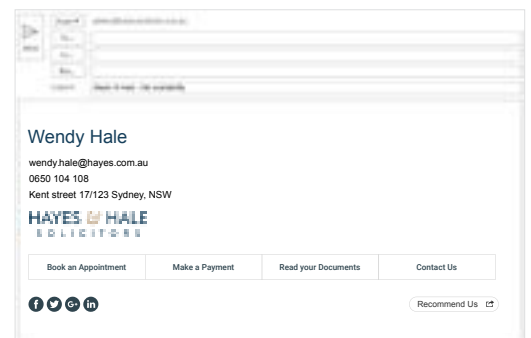
REPLACE YOUR CONTACT PAGE

By having your website Contact page directed to your Service Portal, your clients have one channel to communicate and collaborate with you online. The benefit for you, is that you can capture and track all of your prospective clients through your Enquiries Hub.

ENHANCE YOUR EMAIL SIGNATURE

Your email signature is a simple yet effective tool to promote your Service Portal for free! You send on average 40 work-related emails a day; why not use that opportunity to your advantage.

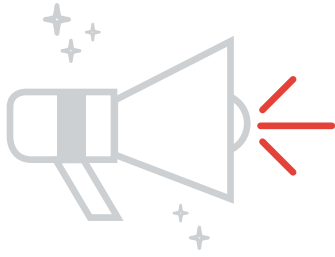
If you are already using the email signature buttons, add a quick note at the end of your email explaining how to interact with the buttons.



ADD THE SERVICE PORTAL BUTTON TO YOUR WEBSITE

If you have not already, adding a call-to-action button on your website to your Service Portal will encourage and remind clients of where they can go to book an appointment, pay their bills, access documents and make enquiries.

Tips to increase client adoption

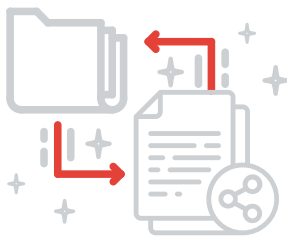


INFORM YOUR CLIENTS

Make sure your clients know where they can find your Service Portal and how they can use it. Send out an email or newsletter, add a voice recording to your message bank/on hold message, create a sign to display in your reception and let clients know about your Service Portal in your face-to-face meetings. You can also create a social media post announcing your Service Portal and include a direct link to it.

ENCOURAGE CLIENTS TO PAY ONLINE

Most firms lose payment opportunities by only accepting cash, cheque and EFT. Encourage your clients to pay their bills through the Service Portal - this way they can pay their bills 24/7 and choose from a range of payment options, i.e., BPAY, EFT, and credit card.



SHARE DOCUMENTS WITH YOUR CLIENTS

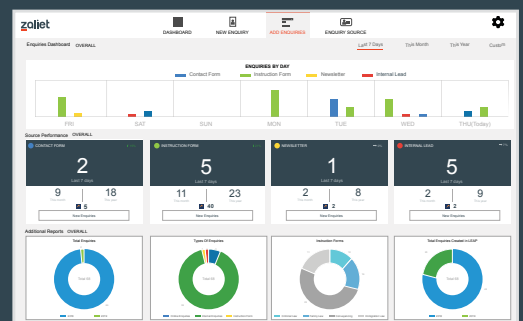
Securely share documents with your clients directly from the matter in LEAP. Your clients then can access and collaborate on the shared documents through your Service Portal at their convenience.

Get your staff involved

TAKE ADVANTAGE OF YOUR ENQUIRIES HUB

Your Enquiries Hub allows you to log calls and emails from any device, helping you manage the progress of each prospective client.

Enter new enquiries such as walk-ins or phone calls by using the "Log an Enquiry" function. Exclusive LEAP integration allows your prospective clients to instantly appear in LEAP with a click of a button, eliminating costly non-billable admin time.



ANALYSE YOUR INTERACTIONS

Every enquiry made, appointment requested or instruction form received appears in your dashboard. The real time interface of the dashboard displays your firm's historical trends from all sources on your Service Portal allowing you to monitor and make informed decisions.

Using your Service Portal in the office

ELIMINATE PAPER FORMS

Getting clients to fill out an instruction form while they wait for an appointment is common. With online instruction forms, clients can fill in their information before attending their appointment or whilst they wait in reception by using an iPad or tablet - their information can then be instantly imported to LEAP as a new Matter at the click of a button.

REPLACE YOUR EFTPOS MACHINE

Do you own an iPad or tablet? One way to make the most of your Service Portal while educating clients is using your Service Portal on an iPad or tablet for payments when you are on the go, i.e., client visits. This way clients can see how easy the Service Portal is to use, encouraging them to use it in future communication with your firm.

OUR ZALLET CLIENT, JESSICA MILLS OF YARRABILBA LEGAL, SHARES HER STORY OF HOW THE SERVICE PORTAL REPLACES HER EFTPOS MACHINE.

“ My firm, Yarrabilba Legal offers mobile, tech driven and affordable legal services throughout SE Qld. I have discovered an added benefit of using the Service Portal as I now have the ability to take payments from clients anywhere at any time.

I use the 'Make a Payment' tab as a mobile EFTPOS machine when I am visiting clients out of the office. It is mobile friendly, secure and means I can now accept credit card payments instantly with the assistance of RapidPay. It works seamlessly with LEAP generating its own receipt on the matter record once the payment has processed. It is fantastic! ”

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To Do Checklist

- Added buttons to my email signature
- Replaced my 'Contact Us' page on the website with the Service Portal
- A call-to-action to the Service Portal on my website
- In a client newsletter
- Face-to-face client meetings
- Email and letter correspondence with clients
- A voicemail message on my mobile or landline
- Social media posts
- A sign in reception
- My business cards
- Through marketing material, i.e., a flyer, brochure, or pamphlet