



Legal Services for Consumers

Qualitative Research into Client Behaviour,
Use and Satisfaction

Research for CILEx Regulation

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FOREWORD

In our three-year rolling strategy, we set ourselves an objective of protecting consumers and improving their experience by better understanding their needs and focusing our decision-making on them.

Our purpose in commissioning this piece of work from IRN Research was to explore in more detail the consumer experience of legal services and the reasons for the choices made. The outcomes of this research will help us to address our strategic priority and prepare us for further work on understanding the information that best aids consumers in making a choice.

We wanted to understand the consumer perspective behind the quantitative surveys that have previously been carried out and try to find in more detail what drives a consumer's decision-making process.

By using qualitative research methods we could explore the behaviour of private individuals as they look for a legal adviser, their experience of using a legal adviser and their relationship with the adviser, and the reasons for their satisfaction or not with the advice and services offered.

Given the importance of developing quality indicators in the legal sector, this provides us with a valuable opportunity to understand what a consumer might see as a reliable measure of quality, particularly in light of the fact that the purchase of legal services is likely for most consumers to be an infrequent activity. Understanding this is especially important when the choice consumers are making is affected by an imbalance of information between them and the legal professional.

We look forward to discussing the outcomes of this research with all those interested in a deeper understanding of the consumer experience.

Sam Younger
Chair
CILEx Regulation

1. EXECUTIVE SUMMARY

Research into the way private individuals choose and use legal services, and their satisfaction with the legal advice and services offered, has tended to focus on quantitative surveys.

This research sought to explore in more detail the behaviour of private individuals as they embark on a legal issue, and then look for a legal adviser. The research comprises the main report analysing the results of in-depth telephone interviews with 146 individuals who have used various legal advisers, followed by a further section providing insights from three virtual focus group sessions.

The main report looked at six key question themes:

1. Identification of legal need and decision to use a legal adviser.
2. Searching for, and choosing a legal adviser
3. Initial contact with legal adviser
4. Working with, and the relationship with, their legal adviser
5. Reasons for satisfaction or not with the advice, service and final outcome
6. Likelihood of/Approach to recommending a legal adviser informally or via a comparison site or social media

We chose three practice areas: family law; probate; residential conveyancing. These areas were chosen because these are some of the most frequently used by consumers but service delivery differs from one area to another. Conveyancing services are mainly transactional whereas family law services are more tailored to an individual's specific circumstances. Additionally, they provide the opportunity to consider services where consumers are comparatively more vulnerable given the nature of their legal needs, as with family and probate law, than those requiring conveyancing services.

The results have provided us with a much more detailed insight into customer behaviour, the expectations they have of legal advisers and the key aspects of the service that they really value. These are summarised here:

- More work is needed on educating the public on when a legal adviser may be required so they can make more informed choices.
- Other influences can affect decisions on 'shopping around' and a consumer may value different criteria to that assumed up to now.
- The basis for the final choice of legal adviser differs across areas of law.
- Consumers wished they had better knowledge at that start to ask more questions.
- A checklist of all steps in the legal process would be valued by consumers.
- Satisfaction levels with legal advisers is high.
- Regular communication could be improved across all areas of law.
- Satisfaction with outcome was high.
- Recommendations limited to close family & friends; no desire to give or rely upon wider reviews.

The next section provides a summary of the results from our main report, and a more detailed look at the results can be found in Section 4. Both sections include selective quantitative information and the detailed results sections has some quotes from the responders. Section 3 explains the methodology used. We have also included further insights from our focus group sessions in Section 5.

We believe that this research has provided us with a different perspective on what consumers value and this will be valuable in the continuing work around improving information that consumers can access and considering what measures of quality will be valuable in making a choice of legal adviser.

2. RESULTS SUMMARY

General survey results, and selected specific results for each practice area, are summarised in this section. The results of the focus group sessions can be found in Section 5. Some of the key differences between the three practice areas are noted in Figure 1.

Figure 1: Key summary results - differences between practice areas

Conveyancing	Family Law	Probate
• Almost all knew they needed legal advice at start. • Majority guided by other advisers when choosing legal advice. • Minority had first consultation face-to-face. • Majority had to chase up their adviser for updates. • More than 10% would use comparison sites and/or social media.	• Less than half knew they needed legal advice at start. • Mix of options used to find a legal adviser, led by Google search and recommendations. • Clear majority had first consultation face-to-face. • Over a quarter had to chase up their adviser for updates. • Less than 10% would use comparison sites and/or social media.	• Just over half knew they needed legal advice at the start. • Over half went back to a law firm used before. Other options led by Google search. • Clear majority had first consultation face-to-face. • Almost a third had to chase up their adviser for updates. • Less than 10% would use comparison sites and/or social media.

Source: IRN Research Legal Services Client Survey, 2020

Identification of Legal Need and Decision to Use a Legal Adviser

When identifying their legal need, most (95, or 65%) individuals knew from the outset that they had a legal issue. This was true across all three areas of law. However, the approach to whether consumers decided to seek legal representation from the outset, or at a later stage, differed by area of law.

Conveyancing

- Virtually all consumers (46, or 92%) who wanted to buy or sell property decided from the outset that they would instruct a legal adviser to do their legal work.

Family law

- Less than half (22, or 46%) of the family law interviewees instructed a legal adviser from the start.
- The other individuals had not been expecting to need a legal adviser and only decided later in the process that they needed legal representation for the following reasons:
 - one group (10, or 21%) were suddenly faced with a demand from a legal adviser acting for a former partner, an unexpected court order, or contact from social services;
 - The largest group (12, or 25%) had tried negotiations but these had broken down; and,
 - a few (4, or 8%) found it too complicated to handle on their own.

Probate

- Almost half of individuals (21, or 44%) started the process themselves and were expecting to complete it on their own. However, they found the process to be more complicated than they were anticipating, or they decided that they did not have time, and they had to turn to a legal adviser for help.

Searching for, and Choosing a Legal Adviser

Searching

- The routes to finding a legal adviser were varied with no one channel dominating. These channels included:
 - talking to friends, relatives and work colleagues;
 - taking guidance from other professional advisers and local agencies;
 - internet searches primarily starting with a Google search;
 - finding law firm offices in streets near to home and work; and,
 - returning to a law firm or legal services provider previously used.

Making a choice

Conveyancing – recommendation of a third-party

- The majority (31, or 62%) were guided on choice of legal adviser early in the process by their estate agent, mortgage lender/broker, housebuilder or other adviser. Virtually everyone (26, or 84%) took this advice and selected legal representation that had been recommended by another professional.

Family law – internet search or family and relative recommendations

- The largest group of individuals (12, or 25%) used Google searches, and/or took advice and recommendations from friends and relatives (10, or 21%).

Probate - return to previous law firm or internet search

- Apart from a large group (25, or 52%) going back to law firms used before, the largest percentage (13, or 27%) involved in probate (compared to the other practice areas) turned to Google to find a legal adviser.

Factors in consumer choice

- Of some concern is that a small group of individuals, primarily first-time users of legal services, are making quick decisions from a limited knowledge base. A number of interviewees (24, or 16%) stated that they had to make a decision quickly, or wanted the issue settled quickly, and the result was a choice made often on one basic criteria, i.e. the law firm was round the corner from where I work, I went with the first one I saw on the Web, they responded to my email request straight away, her tone was friendly on the phone.
- Price of legal services is important but not the most important factor. Some (15%) based their choice only on the lowest price offer, particularly in conveyancing, but more (17%) were persuaded by the availability of local offices and again this was their sole criteria. The experience of the adviser was the only factor for 14%.
- The largest group – 28% - based their choice on a combination of factors, i.e. usually a combination of two or three of price, location, and experience.

Websites

- The website pages browsed most often were the photographs of legal advisers (and biographies), number of offices and where they are, details of any free initial consultations and their availability. Some decisions (22, or 15%) to choose a firm were based on these features together with the individual's view on the overall look of the website.
- The detailed service information seemed to put off some individuals because they did not always understand the terminology. Indeed, individuals rarely used these sites to find detailed information on specific legal services.
- Client reviews on law firm websites were treated with caution as most interviewees accepted that these are selected by the firm.

Free consultation

The availability of a free consultation was a choice factor that persuaded a number of individuals (16, or 11%), especially with family law and probate issues, to use a specific law firm.

Shopping around

- The largest group of interviewees did shop around (46%, or 67), another 27% (40) went to the first adviser they looked at, and another 27% (39) used a law firm they had used before or their family had used before.
- However, those that shop around are still basing their final choices on relatively limited criteria:
 - Shopping around usually means comparing just one or two advisers, or maybe three advisers, and no more;
 - The main criteria that are driving choice are a local firm cost of services, the general look and feel of the website, and the availability of a free consultation;
 - There is little evidence that potential clients concern themselves too much with the technical details of services offered, and some (6, or 9%) even suggest that the jargon used on websites in explaining the services puts them off; and,
 - “Experience” and “reputation” are mentioned as persuasive factors when choosing an adviser by only a few interviewees (14, or 21%).

Initial Contact with the Legal Adviser

- The first consultation with the legal adviser was a face-to-face meeting for the largest group (84, or 57%), but a telephone consultation was also used by a significant number (55, or 38%).

There are some differences between the three practice groups:

- Only 22 (44%) of conveyancing clients had a face-to-face meeting and another 21 (42%) had their first consultation by telephone. Online consultations, emails, and letters made up the rest.
- 67% (32) of family law clients and 63% (30) of probate clients had face-to-face meetings.
- Virtually everyone agreed that their first consultation gave them the information they needed, and offered reassurance that the legal process would be dealt with professionally. For most, the fees were explained at this first consultation.
- When interviewees were asked to look back on that first consultation, after they had gone through the legal process, there was a significant number (42, or 29%) that said they would have asked more questions at the start but they did not know the right questions to ask. Interviewees felt they needed information about such issues as:
 - how much work and documentation they would have to deal with;
 - how many face-to-face meetings could be arranged;
 - exactly which staff, apart from the legal adviser, would deal with aspects of the matter;
 - frequency of updates;
 - ease of contacting legal adviser;
 - who would represent them in court;
 - details of the court process; and,
 - what specific terminology meant.

Working with, and the Relationship With, a Legal Adviser

Relationship with legal adviser

- For the overwhelming majority (131, or 90%) of interviewees, their relationship with their legal adviser was good and most feel that the adviser was professional, approachable, and understood the legal needs of the individual.

Delivery of services

- Services were delivered in a variety of ways and virtually everyone (130, or 89%) found these delivery methods effective. On average, there were three different delivery methods used in some way in dealing with any given legal issue.
- In conveyancing, emails and telephone contacts were the main options; in family law, there was an equal split between face-to-face, telephone, and email.
- More family clients had a face-to-face consultation at the start of the process and there were more face-to face meetings along the way, compared to the other practice areas.

Communication

- One issue highlighted regularly in the interviews, and a problem for almost half (45%) of interviewees, was that communications from the legal adviser or other staff were not as regular as they would have liked. There were too many times when clients had to push their legal adviser for information and updates.
- Over a third of interviewees (38%) had to chase their adviser for updates, and this increases to 54% of conveyancing customers.

Documentation

- For most interviewees there were no surprises during the legal process. The only issue mentioned by a group of interviewees (5) was that there were more documents to check and sign than they were expecting and they were left to their own devices too often to deal with these.

Issues in conveyancing

- Despite most conveyancing procedures following a series of clear steps it was conveyancing clients (16, or 30%) that had the most surprises. Two issues were mentioned in particular:
 - the legal adviser missing major issues impacting on a property (3 interviewees) and,
 - unexpected delays in the process (5 interviewees)

Areas for improvement

- A supplementary question asked if anything could have been changed to improve things and key areas mentioned were more:
 - communications and updates;
 - face-to-face contact; and
 - support in dealing with legal documents.

Costs and billings

- A large majority (117, or 80%) said that the details of costs and billings were clear and there were no hidden fees as the process moved on and was completed.

Fixed fees

- Fixed fees is the pricing model for nearly all conveyancing clients and a majority of family and probate clients paid a fixed fee. For most, fixed fees quoted were the final fees charged.

Reasons for Satisfaction or Not With the Advice, Service, and Final Outcome

- Despite some criticisms of the legal processes described earlier, an overwhelming majority (127, or 87%) of interviewees were satisfied or more than satisfied with the advice they received.
- Expectations regarding the outcome of the legal matter were broadly the same for a large majority, i.e. that the process should be completed efficiently and as quickly as possible, and these expectations were met for the most part met (121 individuals, or 83%).
- There were a small number (12, or 8%), and all but three of these were in family law, that were unclear about what to expect at the start but all individuals in this group were satisfied with the final outcome.

Likelihood of/Approach to Recommending Legal Adviser Informally or Via a Comparison Site or Social Media

- Some interviewees (32, or 22%) had recommended their legal adviser to other people directly but hardly anyone (8, or 5%) had used review sites or social media.
- The small number of interviewees who had a negative experience of using a legal adviser had also not commented on this experience anywhere and were unlikely to do so.
- The main reasons interviewees cited for not giving recommendations or publishing reviews were that:

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- individuals were cynical about the usefulness and credibility of reviews;
 - individuals had no interest in submitting a review;
 - a small group (24, or 16%) had never used review sites and would not know how to do so;
 - another group of interviewees just wanted to complete the legal process, forget about it and move on; and,
 - another group would be reluctant to offer a recommendation just in case it did not work out, or in case the person reading the review were to use a different adviser from the same firm.
- Apart from those already using comparison sites and/or social media for recommendations, another 10% (14) said that they might use at some point

Summary and Conclusions

By adopting a qualitative research approach, the aim of this study has been to dig deeper into the client journey when an individual embarks on a potential legal issue and then uses a legal adviser. The results offer more insights into client behaviour, understanding of adviser choices and the legal process, and satisfaction with their legal adviser. Some conclusions from the research are given here based on the six stages of the client journey investigated in the research.

Stage 1 – Identification of legal need and decision to use a legal adviser

Generally, those individuals dealing with conveyancing and probate knew from the start that they would be involved in a legal process although some in probate take an early decision that they can deal with this themselves and later change their mind. However, a large number of individuals in family law were not expecting to have to engage a legal representative at the start and their lack of readiness for this clearly had an impact on their legal choices later which are often made very quickly and with little research.

These results, particularly in family law, suggest that more work may be needed to educate the public particularly on the stages during and after a divorce or separation and the role of legal advisers.

Stage 2 – Searching for, and choosing a legal adviser

Other studies of legal choices and use have differentiated between those who “shop around” for a legal adviser and others who go with their first choice. In this research, the largest group of interviewees – 46% - did shop around. While individuals should be encouraged to compare legal advisers before making their final decision on who to choose to represent them, the results from this research suggest that even those that shop around are basing their final choices on relatively limited criteria, including the firm is local, the general look and feel of the website, availability of a free consultation, and price.

Only a few clients seem to be interested in the technical details of services offered, and some (6, or 9%) even suggest that the jargon used on websites in explaining the services puts them off.

In family law in particular, and despite some cases being complicated and sensitive, a number of individuals in this practice area chose their legal representatives at short notice and on the basis of

wanting to complete the legal matter quickly. The rush to get the matter dealt with and move on means that individuals are giving little informed thought to their choice of adviser.

Stage 3 - Initial contact with the legal adviser

Initially, most interviewees were satisfied that their initial consultation with their legal adviser gave them the information they needed. However, later in the legal process, some realised that they failed to ask some pertinent questions in this initial consultation. They failed to ask these questions because, not surprisingly, most had little knowledge of legal matters or working with a legal service provider and just did not know what to ask or expect as the process moved forward. This is true across all three practice areas but was mentioned the most in conveyancing (32% of interviewees compared to 29% in the interviews overall) where many interviewees were first-time buyers. These interviewees assumed that the conveyancing process would be a relatively simple step-by-step approach dealt with by their legal adviser but later found out that they would have to deal with various tasks, and detailed documentation, that they had not been expecting and had not been told about.

An option mentioned by a number of interviewees was that all legal advisers should provide a clear checklist at the start of all steps in the process, what the client would be expected to do, who would be undertaking the work in the law firm (i.e. the legal adviser or other staff), and possible issues arising. Others suggested that there should be at least a leaflet, an information pack, or a list of FAQs that a client can take away and look at and come back on if there were any queries. Again, case studies of previous cases were another option mentioned, with these case studies detailing the checklist points noted above.

Stage 4 – Working with, and the relationship with their legal adviser

Despite some of the reservations noted earlier, the interview comments suggest that the overwhelming majority managed to find a legal service provider that they were satisfied with. Most felt that their relationship with their adviser was good, and nearly everyone said that the other staff they dealt with in a law firm were also good or excellent.

The one issue that came up frequently was that communications from the legal adviser were not regular enough, and too many clients had to chase their adviser at regular intervals to receive an update on progress. Clients expected an update, if only for reassurance, and even when there was nothing much to report: a regular contact to show the client that the adviser was still on top of the case.

Stage 5 – Reasons for satisfaction or not with the advice, service, and final outcome

Virtually everyone was satisfied with the final outcome, even if on occasions it had taken longer than expected or the final fees were higher than expected but these two issues were only mentioned by a few interviewees.

Stage 6 – Likelihood of/Approach to Recommending the Legal Adviser Informally or via a Comparison Site or Social Media

Just as in many other consumer sectors, a satisfied client often means one that will recommend services to others and this is true of legal services. A number of those interviewed have already recommended their advisers to friends, relatives, and work colleagues and others say that they would do so if they were asked. However, there is very little evidence that any of the interviewees would be persuaded to use an online legal services comparison or review site or post a positive comment on social media.

Given the current discussions around the possible future use of comparison and consumer review sites in the legal sector, the research suggests that a great deal of work would need to be done to convince consumers that these sites are appropriate and relevant to the legal services sector. There are also concerns from some consumers about the general credibility and reputation of these sites, given the publicity surrounding fake reviews and paid-for reviews being posted on some sites in other sectors. Then there are those clients, especially in family law, that want to move on and forget the legal matter once it is over and the last thing on their minds would be posting a comment somewhere.

3. METHODOLOGY

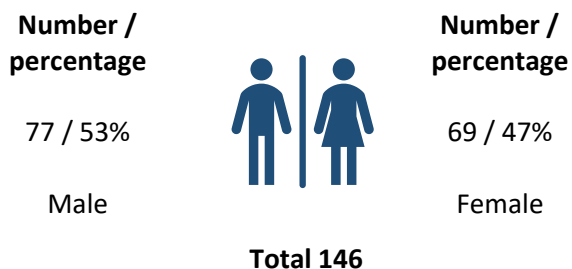
The core methodology involved 146 in-depth telephone interviews with private individuals that had used a legal adviser in the last 18 months. Interviews were carried out between February and April 2020.

The 146 interviews were split between three areas of law.

Figure 2: Survey samples



The gender and age of the 146 interviewees were



age	number	percentage
18-30	25	17%
31-45	35	24%
46-60	48	33%
60+	28	19%
No age supplied	10	7%
Total	146	100%

Source: IRN Research Legal Services Client Survey, 2020

There was a regional spread of interviews across England and Wales.



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Question themes were designed to carry out a deep dive into the interviewees thought processes and actions relating to:

1. the thought process and actions that led an individual to a legal adviser
2. their experience of using a legal adviser
3. their relationship with the adviser
4. their reasons for their satisfaction or not with the advice and services offered/ satisfaction with advice, service and final outcome
5. any actions after the legal matter was completed.
6. any actions after the legal matter was completed. /Likelihood of/ approach to recommending legal adviser informally or via a comparison site or social media.

Six question themes were designed to span the different stages of the legal process and carry out a deep dive into the interviewees thought processes and actions relating to:



All potential interviewees were reassured about their confidentiality and anonymity and it was explained in an initial telephone call that discussion would focus on the legal process and their experiences of using a legal adviser and not the case details or the specific outcomes of the case.

Interviewees were recruited from a wide range of sources including a consumer panel and invitations via social media, local media, printed free community magazines, and local community groups. The aim was to not only include people experienced in using digital media but some that had limited or no experience of using the Internet or online platforms.

Each interview took between 15 and 20 minutes to complete and an incentive of a £20 Amazon voucher was given to each participant. Anonymised transcripts of interviews were prepared.

4. SURVEY RESULTS

This section analyses the results for specific questions asked and, where relevant, selected quotes from interviewees are included. More quotes and comments from some interviewees are given in a separate Appendix.

1

Identification of legal need and decision to use a legal adviser

Process Leading to Looking for a Legal Adviser

Question: *Can you explain the process that led you to turn to a legal adviser for help. For example, once the problem arose did you know immediately that you needed to find a legal adviser to help you or not? If the latter, what was the trigger that made you think that you might need a legal adviser?*

A clear majority of all interviewees (95, or 65%) were aware that they needed to use a legal adviser once an issue arose.

Family

Only 46% (22 out of 48) knew that they needed a legal adviser from the start. The majority (54%) tried other options first before turning to a professional legal adviser.

The majority only decided later in the process that they needed legal representation for the following reasons:

- the largest group (12, or 25%) had tried negotiations but these had broken down;
- one group (10, or 21%) were suddenly faced with a demand from a legal adviser acting for a former partner, an unexpected court order, or contact from social services; and,
- After starting the process themselves, a few (4, or 8%) found it too complicated to handle on their own.

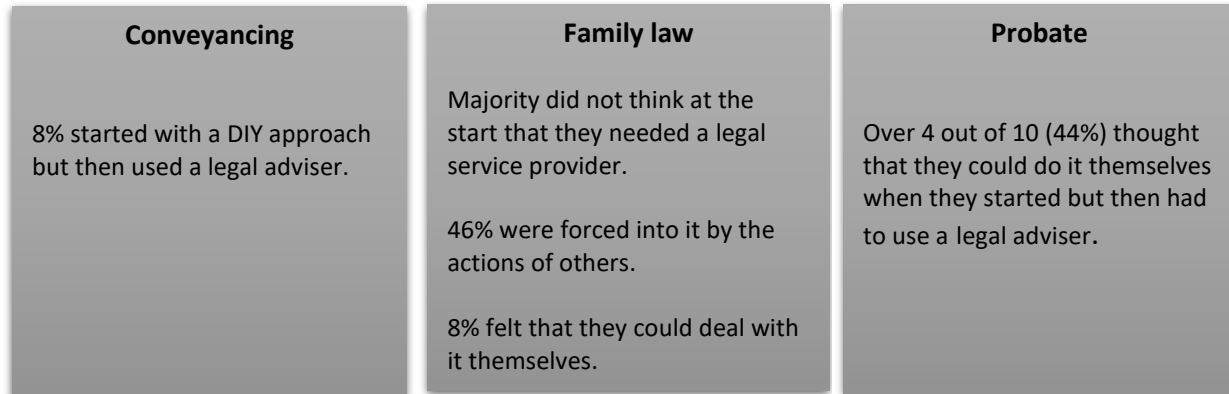
Conveyancing

In conveyancing, apart from a handful of interviewees (4, or 8%) everyone knew they would need professional help from the start.

Probate

There was a significant group (21, or 44%) that tried other options first before turning to a professional legal adviser. A majority (56%) of those involved in probate found a legal adviser at the start. Of those coming to a legal adviser later in the process, 19 of the 21 tried to deal with estate administration themselves but realised it was becoming too complicated, especially where probate was contested or where a person had died intestate.

Figure 3: Stages when a legal adviser was engaged



Source: IRN Research Legal Services Client Survey, 2020

Selected quotes

“I got the court paperwork and tried to see what I can do myself. Everything looked a bit complicated and I decided to approach a legal service provider just to see if they could give me a bit of advice with the papers but in the end I took one of their legal packages for the whole thing” (conveyancing)

“I read up about probate and thought I could do it myself but as I am looking after a parent with dementia, I thought I wouldn’t have the time. Then I also wanted things done exactly right for the Land Registry and HMRC. I just felt that I might make a mistake, so I decided to go with a professional” (probate)

It was the unreasonable behaviour and demands of the father that triggered it and then we thought we needed legal help. We tried to be adult about it and discuss things reasonably, but it didn’t work and the legal route was the only option” (family)

2

Searching for and choosing a legal adviser

***Question:** What sources did you use to find a legal adviser? If more than one, which were the most important or were more useful to you and why? Did you choose from a range of advisers or just go with the one? If the latter, why?*

Sources Used to Find a Legal Adviser

With the exception of conveyancing, there is no one route used by a large number of individuals when looking for a legal adviser.

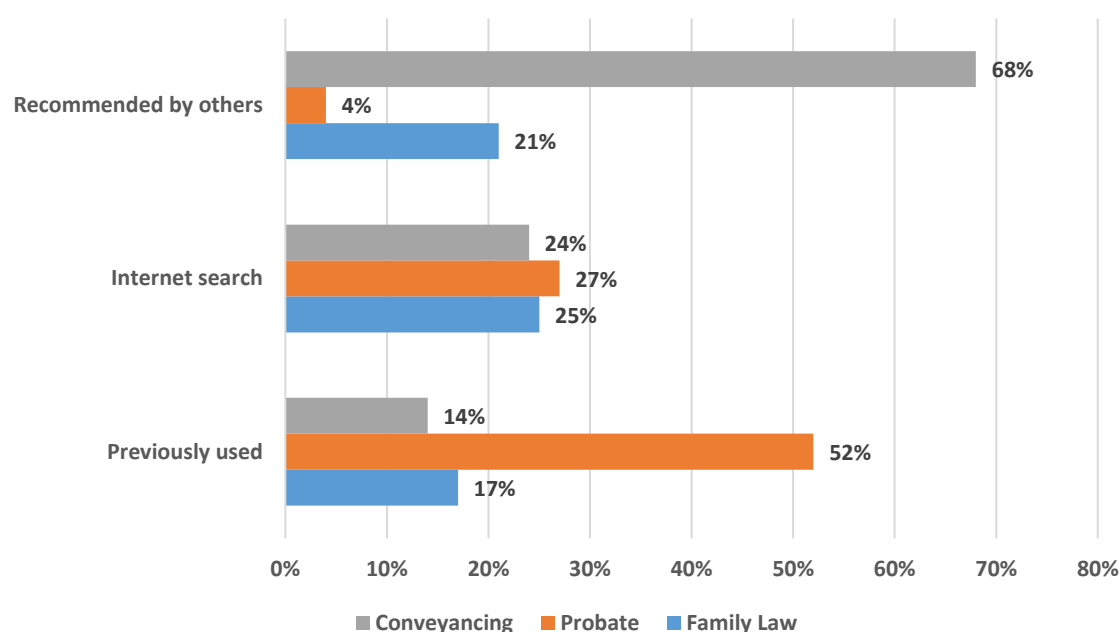
The clear majority of those seeking conveyancing advice (31, or 62%) are guided by their estate agents, financial advisers, mortgage lenders, or housebuilders where a new build is being purchased. Their choice is usually limited to two or three options given to them by these advisers and most take one of these options. Before making the final choice, most individuals take a look at the websites of the firms, and a few checked out client reviews. One consideration is that the legal adviser must be local but the choices offered are nearly always local anyway.

For family law clients it is a mix of previous use, recommendations, and some Internet searching but there is a significant group of first-time users of legal services that are making quick decisions from a limited knowledge base. A number of respondents stated that they had to make a decision quickly, or wanted the issue settled quickly, and the result was a choice made often on one criteria, i.e. the law firm was round the corner from where I work, I went with the first one I saw on the Web – it had a number of branches so it must be good, they responded to my email request straight away, there was a firm listed in a free local magazine, the friendly tone of the first phone call.

Compared to the other two practice areas, more probate clients (25, or 52%) went back to a law firm used before, and others used the Internet to compare services. Typically, individuals checked out 3 or 4 firms before making a choice. A small group were guided by other organisations, e.g. Citizens Advice, the local housing association, an accountant. Local offices were again important.

Figure 4 details the top three routes to finding a legal adviser.

Figure 4: Top 3 methods of looking for a legal adviser



Note: Recommended by others includes recommendations from professional advisers and private individuals

Source: IRN Research Legal Services Client Survey, 2020

Shopping around

Other studies of legal choices and use have differentiated between those who “shop around” for a legal adviser and others who go with their first choice.

The largest group of interviewees did shop around (46%, or 67), another 27% (40) went to the first adviser they looked at, and another 27% (39) used a law firm they had used before or their family had used before.

While individuals should be encouraged to compare legal advisers before making their final decision on who to choose to represent them, the results from this research suggest that even those that shop around are basing their final choices on relatively limited criteria:

- First, shopping around usually means comparing just one or two advisers, or maybe three advisers, and no more. Of the 67 interviewees that made a choice from more than one adviser, 43 (67%) compared just two options. Another 16 (24%) compared three options;
- Of the 29 individuals shopping around for a conveyancer, almost three-quarters (21, or 72%) were comparing conveyancers suggested to them by another adviser;
- The main criteria that are driving choice are a local firm (this is mentioned most often either on its own or with another factor – cited as important by 24 or 36%), cost of services, the general look and feel of the website, and the availability of a free consultation;

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- There is little evidence that potential clients concern themselves too much with the technical details of services offered, and some (6, or 9%) even suggest that the jargon used on websites in explaining the services puts them off;
- “Experience” and “reputation” are mentioned as persuasive factors when choosing an adviser by 14 interviewees (21%);
- A frequent comment is that law firms are “much of a muchness” so other criteria become more important like those noted above, plus the way a potential client is treated when they make their initial inquiry: comments like “they didn’t call me back” or “they seemed friendly” tipped the balance for some one way or another when choosing a legal adviser; and,
- Responses from some clients (9, or 13%) also suggest that they are more likely to choose a large law firm rather than a smaller one. Perceptions are that large firms with multiple offices and many legal service providers are more likely to be solid and established and able to deal quickly with the legal matter. Some feel that smaller law firms may be less able to cope with too much workload.

Family law issues can be some of the most difficult, sensitive, and severe problems to resolve and there are many examples of these described in the interviews. Yet, it is also clear that a number of individuals in this practice area (9, or 19%) chose their legal representatives at short notice and on the basis of wanting to complete the legal matter quickly. The rush to get the matter dealt with and move on means that individuals are giving little informed thought to their choice of adviser. This group of respondents stated that they had to make a decision quickly, or wanted the issue settled quickly, and the result was a choice made often on one criteria, i.e. the law firm was round the corner from where I work, I went with the first one I saw on the Web – it had a number of branches so it must be good, they responded to my email request straight away, there was a firm listed in a free local magazine, the friendly tone of the first phone call.

Selected quotes

"I initially asked my estate agent and he gave me a couple of names which I checked online and they both looked OK. They both had reviews on their site and client comments but they aren't going to put any bad things on their site so these didn't tell me much. There was also so much information on the sites that it became confusing. They both did a variety of things but that felt better than going with someone who might specialise and be snowed under with work" (conveyancing)

"I went to Citizens Advice..they give you an hour for free. I explained the facts of the case and they said I had a case. I asked if they could recommend one but they could give me a list. They said take them home, google them and have a look on their websites. I googled them and they all sounded pretty much of a muchness but the reason I chose the one I did was because they were in Camden. I live nearby. I knew I wanted a face to face meeting at least at the start" (probate)

"I work in the centre of Birmingham and there are a couple of law firms near work so I just went to look at them....I wanted things done quickly. So I didn't do any research as such and the law firms had decent offices so assumed they would know what they were doing. One said that I would have to make an appointment and the other I just walked into and the receptionist took down some details and she said a solicitor would ring me. A lawyer called me back the next day so I went with them" (family)

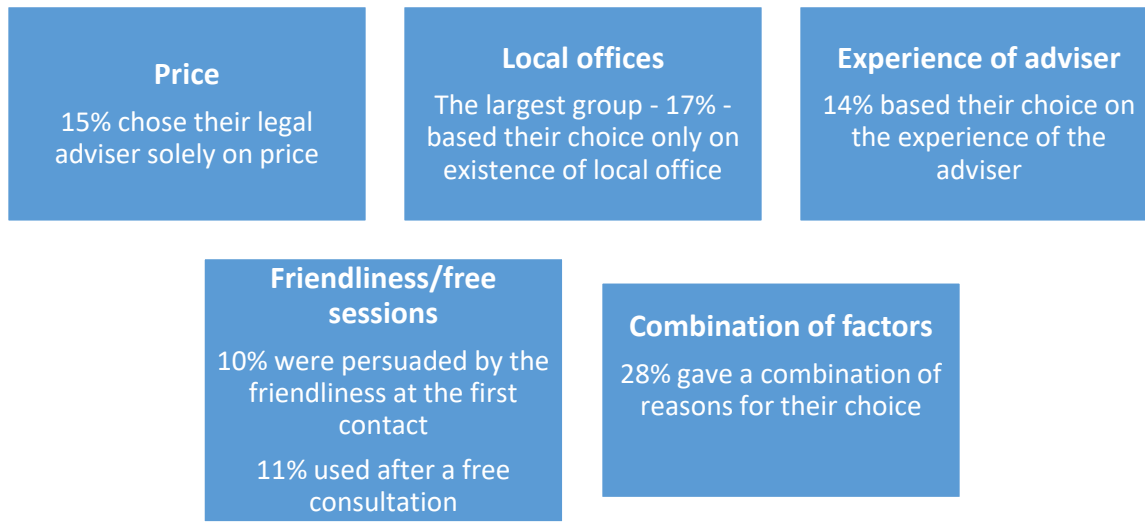
Factors in Consumer Choice

Price of legal services is important but not the most important factor. Some (15%) based their choice only on the lowest price offer, particularly in conveyancing, but more (17%) were persuaded by the availability of local offices and again this was their sole criteria. The experience of the adviser was the only factor for 14%.

A few family law clients (10%) went ahead without knowing detailed fees, again because of their need to move things along quickly, and this led two to take the litigants in person (LIP) route once they found out final fees.

The largest group – 28% - based their choice on a combination of factors, i.e. usually a combination of two or three of price, location, and experience.

Figure 5: Key choice factors



Based on 109 interviewees

Source: IRN Research Legal Services Client Survey, 2020

Websites

Law firm websites are visited by a large number of potential clients but individuals rarely used these sites to find technical information or detailed information on specific services. The pages browsed most often are the photographs of legal service providers (and biographies), number of offices and where they are, details of any free initial consultations and when they are. Some decisions (22, or 15%) seem to be being made on these features

Client reviews on law firm websites are treated with caution as most interviewees accept that these are selective. There is also limited use of client review sites for similar reasons. One or two suggested that, instead of just client reviews on law firm sites, case studies of similar cases would be better provided that they were honest, gave a step-by-step outline of what would be involved, and client/adviser workloads.

A relatively small number (39, or 27%) mentioned looking at price information on websites. The detailed service information seems to put a few individuals (11, or 8%) off because they don't always understand the terminology.

Selected quotes

I noticed that they had more than one office so they must be big and reliable. (family)

They had a good looking website which helped me to decide. (probate)

I noticed it was a female solicitor dealing with divorce and she looked OK so I asked for her. (family)

The website seemed up-to-date. (probate)

Law firms forget that ordinary people are not thinking about legal issues and terms all the time and what they understand we might not. (conveyancing)

I wasn't exactly sure what conveyancing meant so I went with the one that said they helped if you were buying or selling a house. (conveyancing)

Information and Support when Making a Choice on a Legal Adviser

***Question:** Do you feel you had enough information and support to make informed choices about which legal advisers to use? If not, what were the gaps?*

Individuals may be making legal choices on limited information but despite this, across all three practice areas, a majority (88, or 61%) felt that they had enough information and support to make an informed choice of legal adviser. There are still significant numbers in each practice area that were concerned about information gaps.

In family law, half said they were satisfied with the information they could call on but issues from a sizeable minority (13, or 27%) were:

- I had to rush to find someone and wanted more time;
- probably should have looked more but I didn't have time;
- it's a specialist area of law so it was hard to find anyone;
- not sure exactly what I should have been looking for so difficult to choose;
- most firms look the same; and,
- reviews all say the same things.

The other 23% could not give a clear answer as they were unsure what information they needed to look for.

A clear majority of probate clients (35, or 73%) said that they had enough information and support, and this is partly a reflection of the fact that the largest group went back to a legal adviser used before, and others went with the option given to them by an advice agency or individual adviser.

Just over half of conveyancing clients (29, or 58%) said that they were confident they had enough information because they were guided by their financial advisers, lenders, estate agents and others. There was a group of first-time buyers who were not confident that they had enough information for various reasons: a lack of understanding of some of the terminology; online searches became confusing as all the legal providers looked the same; some were not sure what they were looking for exactly; some just went with the first one they came across.

Across all three practice areas, there is a group – well into double figures – that walked into a law firm's office and made the decision to take the matter further with this law firm based on first impressions, i.e. office appearance, friendliness of first contact, information given by first contact etc.

Reason for Choosing a Specific Legal Adviser

Question: What convinced you to pick the legal adviser that you did?

Conveyancing clients took advice and recommendations from their other advisers, e.g. mortgage lenders, estate agents etc. Some of these only offered one option while others provided a short list of recommended legal advisers to choose from. Virtually everyone, when given a list, checked these options themselves and then made a choice which was driven by a mixture of factors, with price and local law firm top of the choice criteria. Price was more important for conveyancing clients than for other practice areas. The fact that a firm was well-established was also important.

In family law, there were various triggers that encouraged an individual to choose a specific adviser. The most important was the fact that the firm offered a free initial consultation and the consultation itself persuaded the individual to appoint that adviser. A similar reason given was that the first telephone call with the adviser was reassuring compared with calls made to other advisers, e.g. the adviser put me at ease, he/she seemed knowledgeable, it was a woman. Other selected reasons mentioned by a number of interviewees: I needed to act quickly so chose first one; I chose the one that could move the quickest; I could walk into their offices and check what they were like/first impressions.

A large group of probate clients were previous users of legal services and went back to an adviser used before. Other reasons mentioned a number of times were: they offered an initial free consultation which persuaded me; they were a local firm; they had an impressive looking website; they had more than one office; they seemed to have experienced advisers.

Selected quotes

“She seemed a lot more mature and experienced than the other people I had spoken to. She was calm and there were good recommendations on the site about her and it was a good price” (conveyancing)

“Basically as I said it was the location. There wasn’t an awful lot of difference in what they offered and their fees. Some out of town had cheaper rates but then I thought there are travel costs and so on. The firm I chose had a good CV on their website” (probate)

“They seemed to know what they were doing, were quick to respond, but they seemed pricey. But as I said I wanted it sorted so went with them” (family)

3

Initial Contact with the legal adviser

Initial Contact with Legal Adviser

***Question:** After you had selected a legal adviser, how did the initial contact with your legal adviser take place, and what were your initial impressions? Did you get the information and advice needed that you expected in this initial contact?*

The first consultation with the legal adviser was a face-to-face meeting for the largest group (84, or 57%), but a telephone consultation was also used by a significant number (55, or 38%).

There are some differences between the three practice groups:

- Only 22 (44%) of conveyancing clients had a face-to-face meeting and another 21 (42%) had their first consultation on the telephone. Online consultations, emails, and letters made up the rest.
- 67% (32) of family law clients and 63% (30) of probate clients had face-to-face meetings.

Virtually everyone agreed that their first consultation gave them the information that they needed, and offered reassurance that the legal process would be dealt with professionally. For most, the fees were

explained at this first consultation and, with just a few exceptions, these fees were the final fees charged.

However, a theme emerging from answers to a later interview question was “I wish I knew then (i.e. at the first consultation) what I know now”. There were 42 interviewees (29%) that suggested that they didn’t know the right questions to ask in the initial consultation and would have asked more now that they were aware of the process, for example:

- questions on how much work and documentation they would have to deal with;
- how many face-to-face meetings could be arranged;
- exactly which staff would deal with aspects of the matter;
- frequency of updates, ease of contacting legal adviser;
- who would represent them in court and details of the court process; and,
- what specific terminology meant.

Some interviewees suggest that it would have been good to receive an information pack or a leaflet to take away and refer to after the first consultation. The purpose of this document would be to explain in more detail the various elements of the legal process, the demands expected from the client, and terminologies used. In other words, to cover some of the areas that the client didn’t ask in the first consultation.

Selected quotes

“We had a letter sent to us – just a basic letter stating who she was, who her assistant was, and contact details. I thought they may have contacted us by phone and it was just my partner that got the letter. I wouldn’t say we had all the information we needed – there was nothing there that said specifically what we will do. We thought we might get steps outlined and things like that” (conveyancing)

“We had a free consultation with her and she really convinced us that she could help. She was very giving with her time and information. But later we realised we should have asked more. Just the speed I think and the communications by email. We expected more face to face and I guess some of it is passed on to the junior member of staff and we felt it should have been the solicitor. It would have been helpful I think to know who was dealing with what at the start to make it clear” (probate)

“Initially it was on the phone and they seemed to understand and they had experience with similar types of issues. They agreed that our concerns were founded and said we could take it further. I think we got most of the information – the high level stuff – and then it prompted more questions after the call. It was more a high level thing than getting into the detail” (family)

Delivery of Services

***Question:** How were services delivered to you by the legal adviser, i.e. face-to-face consultations, telephone, email, online, post? Interviewer: Explore which used and which most often. Were they delivered in the way you wanted and were these delivery methods effective?*

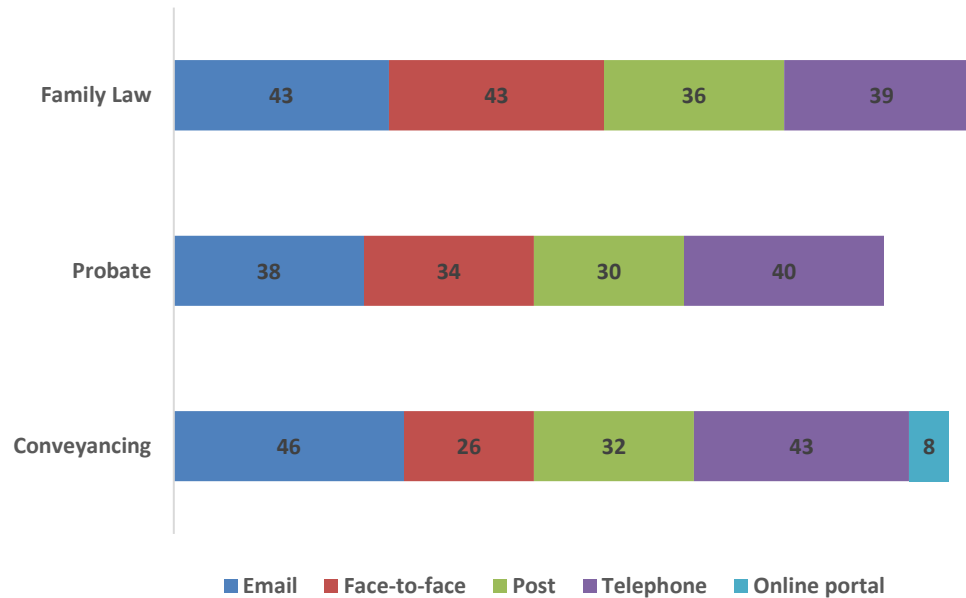
There is a range of delivery methods used but emails and telephone contacts lead the way for conveyancing and probate clients. In family law, there is an equal split between face-to-face, telephone, and email.

More family clients had a face-to-face consultation at the start of the process and there were more as the legal process developed, plus some court appearances required personal consultations. For probate clients, it was mainly email and telephone but some face-to-face, especially at the start of the process. Post was also used mainly for document signings.

Conveyancing clients dealt with their adviser mainly via email, followed by telephone and again post for key documents to sign. Online portals were used by a small group but there were limited face-to-face meetings. There were some concerns over complicated documents sent to read and sign with no guidance (mentioned by four interviewees).

A large majority of clients across the three practice areas agree that service delivery methods were effective for the most part but a group would have preferred more face-to face contact and some pushed for this and obtained it. Some (5 in total) also said, in probate and conveyancing, that they received complicated documents in the post or via email that were difficult to understand and deal with and they would have preferred more guidance from the adviser.

Figure 6: Delivery methods during legal process (%)



Source: IRN Research Legal Services Client Survey, 2020

4

Working with and their relationship with the legal adviser

Question: Were communications from the legal advisor or other staff as regular as you needed to keep you informed of progress?

Frequency of Communications

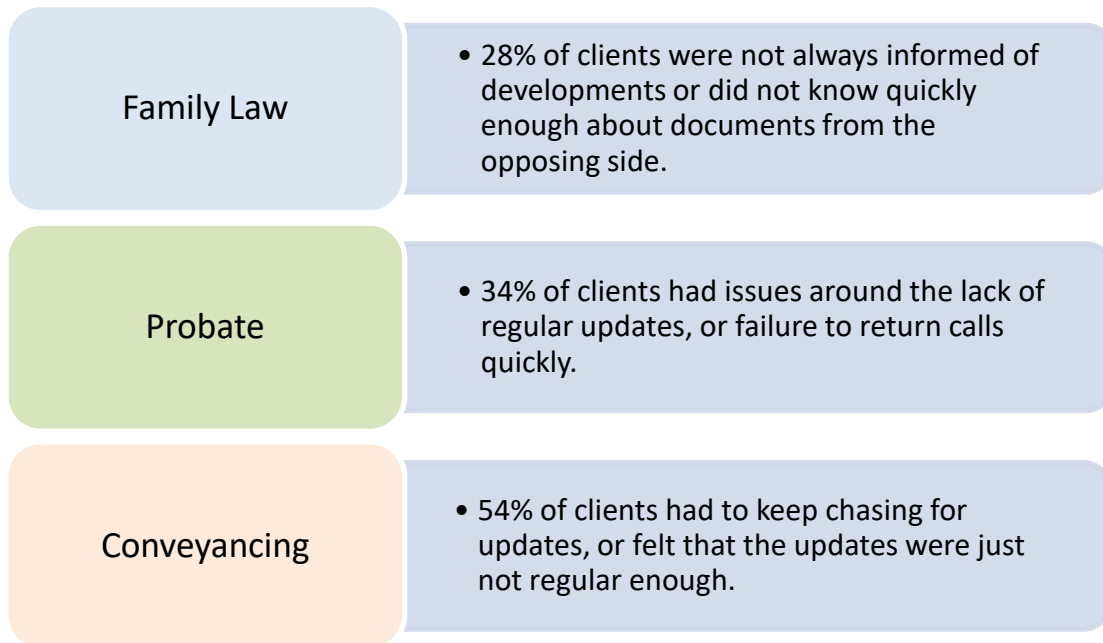
The major issue raised by almost half of interviewees (66, or 45%) was that communications from the legal adviser or other staff were not as regular as they would have liked. Clients had to spend time pushing the law firm for information and updates at various times.

There were also a number of criticisms of the lack of response, or slow response, to queries (47, or 32%). Requests left mainly by telephone, but sometimes email, were not answered in a timely way. These requests were often left with a receptionist or other support staff member and these staff members were sometimes blamed by the client for giving what they felt was misleading information, i.e. the legal service provider will call back today, or soon.

Problems over the frequency of updates were particularly acute in the conveyancing sector (54% had to keep chasing for updates, or felt that the updates were not regular enough). Only around a third of conveyancing clients were satisfied that they had regular updates on progress. The rest either had to keep chasing for updates, or the updates were just not regular enough.

A group of interviewees (10), mainly in family law and probate, were given a direct line number to contact their legal representative and this arrangement had mixed results. For most (7 out of 10) it worked reasonably well, with the other three saying that they may have exploited this arrangement by contacting their representative too many times.

Figure 7: Frequency of communications from legal adviser - issues



Source: IRN Research Legal Services Client Survey, 2020

Selected quotes

“No not really we felt we had to push her very often. It was quite complicated and we felt we needed to know a lot but it was us doing a lot of chase-ups. There was nothing in the initial consultation about updating steps which I should probably have asked about. She just talked about how long it might take but I should have tried to pin her down more on their updates” (conveyancing)

“Yes and no. They just gave me the information needed but maybe it's me not pushing more....I would have liked say weekly updates even if they are only saying there is no change” (probate)

“No it was fairly patchy. It seemed to be when sometimes things happened and I didn't get informed. Like Housing Association documents they got that I never saw. I went into court once and the barrister had information that I hadn't seen which stressed me more. Even though some of these were in my favour I didn't want to go into court without knowing” (family)

Costs and Billings Details

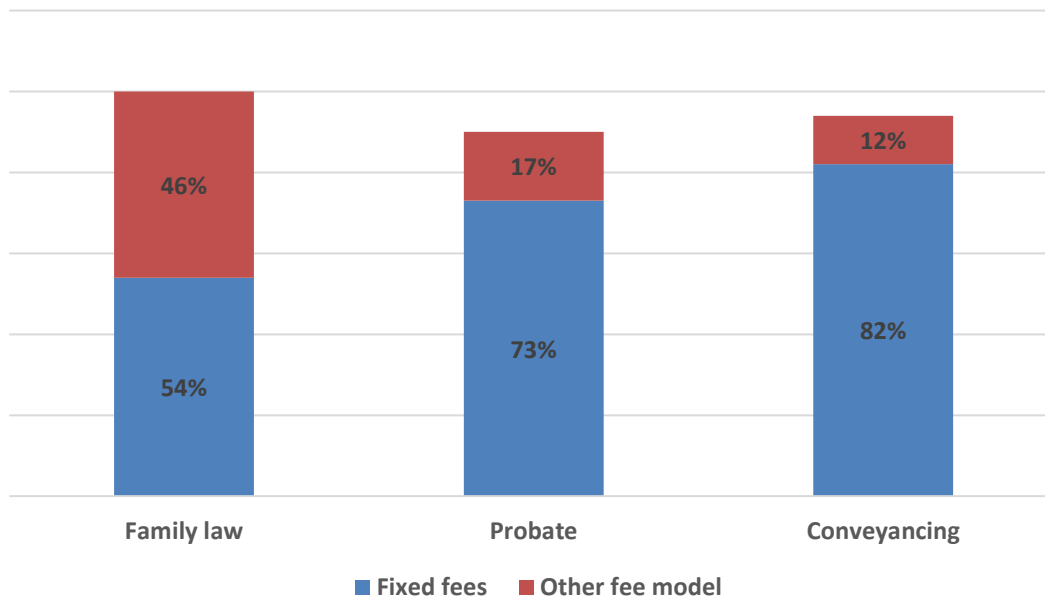
Question: How were the details of billings and costs given to you? Was this all clear? Were the final costs you paid what you had understood you were going to have to pay?

There are hardly any complaints about the details of billings and costs given. A large majority (117, or 80%) said that these were clear and there were no hidden fees along the way.

Almost all of the conveyancing clients were quoted fixed fees at the start and final fees were the same. Fixed fees were paid by most probate clients and initial fees quoted were largely adhered to.

Just over half of all family law clients were given a fixed price at the start and this was the final price charged. Just one or two had a fixed price quote that was higher in the final invoice. Where an estimated fee was given at the start of the process, the final fee was around this estimate at the end of the process for most but a small group had to pay more because of unexpected events emerging in the process, such as additional court time (often created by the opposing party) and barrister fees. A few went ahead without knowing detailed fees because they wanted to move things along quickly. Four were funded by legal aid.

Figure 8: Fee models



Source: IRN Research Legal Services Client Survey, 2020

Unexpected Issues or Developments During the Legal Process

***Question:** Were there any surprises along the way when working with the legal adviser, i.e. changes in work done for you, demands on you, unexpected issues cropping up, fee changes? Were there any serious issues or developments arising along the way that you feel your legal adviser should have dealt with better?*

For most interviewees in family law and probate, there were no surprises along the way. The only issue mentioned by a group of interviewees (five interviewees) was that there were more documents to check and sign than they were expecting and they were left to their own devices too often to deal with these. Other issues mentioned by more than one family law client were:

- the process took longer than legal service provider said (5);
- costs increased (3);
- more work dealt with by assistant, clerk, or paralegal than expected (3);
- legal service provider was changed half way through (2);
- the barrister was not instructed properly by my legal service provider (2); and,
- I was not told of some documents relevant to the court case (2).

Conveyancing clients faced the most surprises (16 or 30%). Two issues were mentioned the most:

- a legal service provider missing major issues impacting on the property (3); and

- unexpected delays in the process (5).

Other issues each mentioned by two interviewees:

- search issues that became complicated;
- the seller dropping out;
- the legal service provider failing to tell a client of key issues; and,
- the legal adviser failing to deal with final issues after completion.

The comments around any improvements that could be made things emphasise areas already covered, i.e. more communications and updates, more face-to-face contact, more support in dealing with legal documents

Relationship with the Legal Adviser

Question: Can you describe the relationship between your legal adviser and you? For example: their understanding of your legal issue, their approachability and accessibility, confidence and trust you had in them.

For most (131, or 90%), the relationship with their legal adviser was good. Most felt that their adviser understood the legal issues and, in family law and probate, advisers were sensitive to any particular difficult issues. A common response from interviewees was that the legal service provider said they had dealt with this issue before and this was reassuring. Conveyancing had the largest percentage of clients offering some negative comments but this group still only represented a small minority (6, or 12%): confidence dipped as the process went on; there was too little contact; they dealt with process too slowly; the adviser was not always easy to contact.

Question: As well as dealing directly with your main legal adviser you may also have had to deal with other staff in a firm, i.e. reception staff, other support staff, other legal professionals. How satisfied were you with the way these staff engaged with you?

Dealing with Other Staff

Virtually everyone in all three practice areas did deal with other staff and almost everyone (140, or 96%) was complimentary about these staff. Just a small number, mainly in probate, felt some receptionists could have given more information when contacted.

Selected quotes

"They were very accessible and approachable and very understanding and patient if I did phone and asked a stupid question because I didn't understand the terminology. I also used Google if I wasn't sure of something - if they told me something I would check on Google. Even though it was slightly legal jargon they did try and provide it in simple English " (conveyancing)

"Yea she was very good and her knowledge of probate was very good, she was regularly in touch and she was accessible. If we called her she would call back" (probate)

"Yea, we left it entirely up to them - wording of letters, communications with the other solicitor - and we discussed certain things after responses. But we trusted her to deal with the other side without checking everything. She was also approachable" (family)

Satisfaction with Legal Advice Services

Question:

Overall, how satisfied were you with the legal advice services given.

If I asked you to describe your general experience of using the legal adviser in one or two words what would those words be?

Generally, satisfaction levels are very high (127, or 87% are either "satisfied" or "very satisfied") even though in some cases the outcome was not as good as expected.

In family law, just under a quarter (11, or 23%) are less satisfied because of a range of factors:

- the adviser chose a legal route which in hindsight could have been changed;
- there were too many missed opportunities;
- there was a lack of clarity regarding court proceedings;
- final prices were more than expected;
- there was limited advance advice given on specific fees arising, e.g.
 - for letters,
 - emails sent; and,
- there was too much emphasis on the client to get things done.

Almost everyone is satisfied with the probate advice given and there is also a group in this practice area that say that they were more than satisfied mainly because their adviser dealt with a complicated

process more quickly than they expected, or because the adviser identified and dealt with unforeseen problems efficiently. The only specific issues for a small number of clients are the high price charged for the advice and the slow process.

A clear majority of conveyancing clients are satisfied with the advice given. Where satisfaction is low this is due to a number of reasons: not enough information and guidance was given at the start and/or during the process on next steps, it was unclear what the client had to do; the legal service provider missed things and/or failed to identify issues; the price was higher than expected.

Selected quotes

“10 out of 10. The main thing was that we were kept fully up to date with the whole process. There was no ambiguity and problems were dealt with quickly. Nothing was hidden - they let us know whether good or bad news”
(conveyancing)

“Very satisfied. Because they got the job done. He seemed to know exactly what I was talking about. And relaxed. I just don’t know how to say it but somebody that meant I wouldn’t need to ask anyone else because he would know”
(probate)

“He has been good and generally they have instilled a good deal of confidence and he has a lot of knowledge about family law matters. He was also upfront at the start that costs for us could increase as we went through the financial settlement” (family)

5

Reasons for satisfaction or not with the advice, service and final outcome

Expectations on the Outcome and the Actual Outcome

Question: *What were your expectations regarding the outcome and did the actual outcome match these?*

Expectations were broadly the same for most interviewees, i.e. that the process should be completely efficiently and as quickly as possible.

Nearly everyone (121, or 83%) across all three practice areas feel that the outcome broadly matched their expectations. For most of those that had criticisms (15), these were focused on the length of time it had taken, i.e. it had taken longer to complete than the adviser had said. The other seven had issues with the final settlement of the legal matter.

In family law, just a small group (5) didn't get what they expected but most of these feel that this was due to a court decision rather than any issue with the legal service provider. One or two interviewees are still completing the final stage.

Negative Experiences and Complaints

Questions:

If there has been a negative experience, has a review has been submitted to a review site/social media or passed negative comments on to any of your friends, relatives or colleagues? Can you give the details of what you said and why you gave these comments?

Have you ever complained about any legal advice services given either directly to your legal adviser or to an independent body? If so, why did you decide to complain?

The number of individuals that have made a complaint, either to the law firm or to an independent body, is just five. Complaints cover: prices charged; errors in documents supplied; documents lost; incorrect advice given; aggressive adviser.

Most of those making a complaint (3) to their legal adviser were able to obtain some form of positive response either through a reduction in the fee, or through a commitment to improve services. There were three individuals that have taken their complaints to an independent body, i.e. the Legal Ombudsman. One was told by the Legal Ombudsman that there would be a delay in dealing with complaints of up to six months and he decided to abandon the process. One individual was able to obtain some positive resolution to her complaint and one other is still waiting to complete the process.

Words to Describe Experience with Legal Adviser

Questions:

If I asked you to describe your general experience of using the legal adviser in one or two words what would those words be?

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Interviewees were asked to offer one or two words to describe their experience of using their legal adviser and all words mentioned by at least two interviewees are included in Figure 8. Top of the list is “Professional” mentioned by 30 interviewees followed by “Satisfactory” (12) and “Satisfied” (8). The two latter words were both used so have both been included in the figure. Other words mentioned by more than 10 interviewees are “Efficient” and “Approachable”, both mentioned by 11 interviewees.

Figure 9: Main words used to describe the experience with a legal adviser



Source: IRN Research Legal Services Client Survey, 2020

Client Recommendations and Reviews

Questions:

Would you recommend/have you recommended the legal advice services you used to anyone else either a) through submitting a review to a review site or on social media b) adding any comments to a social media platform or c) giving a recommendation to a friend/relative/colleague.

If not, what would motivate you to submit/make a review/recommendation and where, e.g. review site or social media or friend/relative/colleague

Over one in five family law clients and over a quarter of conveyancing clients have already recommended their legal adviser to others directly. i.e. friends, relatives, or work colleagues. Personal recommendations from probate clients have been much lower. However, around a third of clients in all three practice areas would be willing to recommend their legal adviser to others directly.

There is a small group – nine individuals - across the total interviews that would be reluctant to give recommendations to personal contacts just in case it didn't work out, or they used a different adviser but in the same firm.

In contrast, hardly anyone has used either social media or online review/comparison sites to make a recommendation or post any comment about the legal services they experienced.

There are a few reasons cited for this lack of recommendations, reviews or posts on social media:

- The largest group are cynical of reviews and their usefulness/credibility and have no interest in submitting a review;
- A small group have never used review sites and would not know how to do it;
- Another group did not feel that review sites, comparison sites and social media were applicable to legal advice services, although they might use these sites for other products and services;
- Another group just wanted to complete the legal process and then forget about it;
- A majority in probate and family law didn't use social media; and,
- Just one or two mentioned that they had been asked by their legal adviser to either provide a comment and rating for a review site, offer a comment on a client feedback form, or add a comment to an online directory. Most had done this.

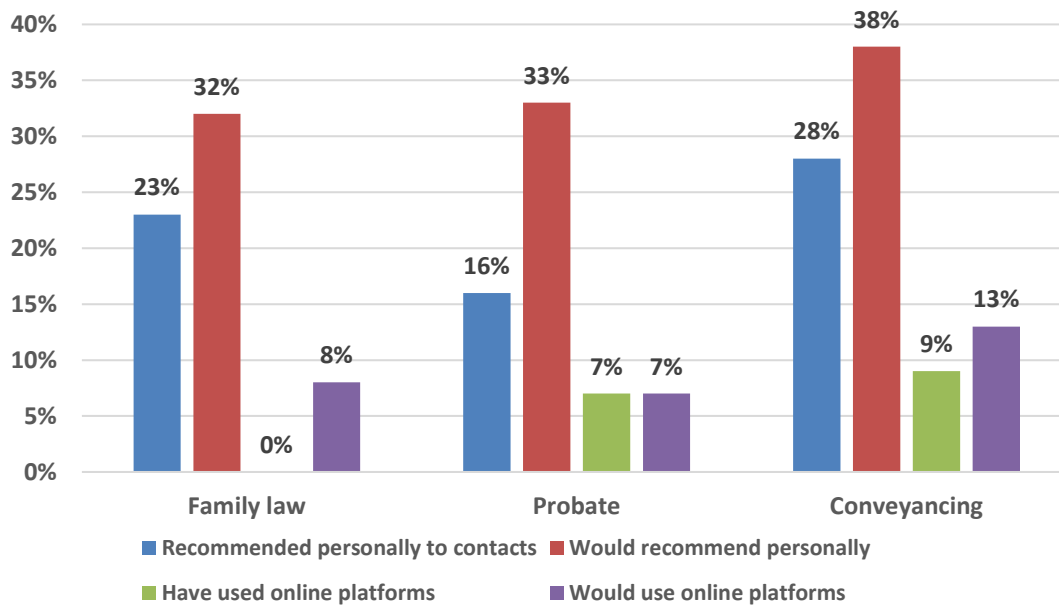
The above responses were influences behind most answers given to the question regarding anything that would encourage individuals to submit a review or post on social media. Most (101, or 69%) suggest that nothing could really motivate them to post on these platforms. The only positive comments come

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from some individuals saying that they might be encouraged to post if their legal adviser asked them to and it was an easy process. More conveyancing clients (13% of those interviewed in this practice area and not having a negative experience of the process) would consider posting on social media or adding content to review sites but this may be a reflection of the younger age profile of this group. Less than 10% in the two other practice areas could be encouraged to post comments or reviews online.

The small number that had a negative experience of using a legal adviser have also not commented on this experience anywhere so far and they are unlikely to.

Figure 10: Recommendations, postings on digital platforms



Source: IRN Research Legal Services Client Survey, 2020

Selected quotes

"Yes I have done word of mouth recommendations already because of the high quality of service. I wasn't asked for a feedback from the firm and not that interested in social media - what would I say? I have bought a house and it all went well from the legal service provider. Not an exciting message!" (conveyancing)

"I would recommend in person but I just don't tend to write reviews or very rarely and I wouldn't think of doing it for a solicitor firm" (probate)

"I wouldn't post on social media as I don't use that much for that kind of thing. Comparison sites maybe I would but I don't know any to go to. 100% I would recommend to someone if they asked" (family)

5. FOCUS GROUP THEMES AND RESULTS

Introduction

In September 2020, three virtual focus groups were held to explore some of the themes emerging from the interviews in more detail and to discuss some additional areas. There were 19 individuals across the three groups including 13 that had completed a previous interview for the research and six that were new participants.

The discussion themes were:

- Reasons for choosing a legal adviser and anything participants would do differently either when choosing a legal adviser or working with the adviser and the firm through the legal process.
- In advance of the sessions, participants were sent links to four legal adviser websites and asked to look specifically at their probate advice services. In particular so that they could comment on the following on each site: services information, any price information, staff details, regulatory information, site navigation and general appearance. The sites were chosen to include a national law firm, two high street law firms, and an unregulated specialist provider of probate services. The sites also had different levels of details regarding the content areas noted above.
- Ways of evaluating quality of advice.
- Use or otherwise of comparison sites in general and their use in the legal services sector. Interest in using these sites in the legal services sector, either for looking at reviews when choosing a legal adviser or posting reviews.
- The virtual delivery of legal services.

Summary

Nearly everyone was satisfied with their experience of using a legal adviser and most would go back again to the same adviser for another legal issue.

Clear and simple websites are preferred to those that are full of too much text. Just one or two wanted the detailed text and processes explained step by step. Price information was considered useful but, for many, it is accepted that the prices on websites are just guides and detailed prices only come when the matter is discussed with a legal adviser. Some felt that some sites had too many pricing options and these were confusing.

Staffing information is not looked at in detail by many participants. Most found the regulatory details on three sites.

Live chat bots are appearing on more legal adviser sites but there is limited enthusiasm for these.

The site liked by most participants was the unregulated specialist probate firm because of its simplicity, clear prices, and offer of related services. It was also seen as more friendlier than the other sites.

Most would consider using comparison sites for legal services but some had concerns that they are not appropriate for legal services.

Digital delivery of services is seen as an inevitable development and most would be confident that they could deal with this. One regular theme – it would still be good to have the first contact as a face to face consultation even if this was via video link or Zoom.

Last experience and anything different next time?

Most of those who have used a solicitor before went back to the same one again. Most of the rest looked online to compare solicitors but a local solicitor was important to nearly everyone. Virtually everyone would at least think about using the same solicitor again if an issue arose.

Evaluation of websites

Services information

The largest group across the three sessions were looking for simple and clear explanations of services with not too much text. This drew most of these to the specialist probate site. However, a second smaller group suggested that the site from the national law firm was good because it had so much detail on specific probate services. As a number of participants noted, the first site mentioned above would be appropriate for a simple probate while the second site gave the detail needed for a more complicated probate. Most did agree that the other two sites didn't have enough information.

The unregulated site was liked by some because of its additional services on offer like bereavement support.

Price information

A common theme from the 3 groups is that prices on a website are just an indication, or a starting point and detailed prices would only be available when you spoke to the legal adviser and explained your specific issue. There were also some concerns that the prices given on websites are not always explained, i.e. what do they actually mean and cover?

Some felt that there were too many pricing options and this was confusing and complicated.

Selected comments

“Cost is an issue and with probate you don’t know how much is involved. You don’t want to land yourself with massive costs so it is hard to predict from a site until someone has looked at it and said oh yes this will cost this much. It’s hard without any legal experience”.

“Pricing on the website didn’t matter. It gives an indication but you know that this is not what you are going to pay. You have to contact them and get a specific quote. Yes you can put on some examples to draw me in. It’s not the information on there initially but it is whether you are attracted by the site”.

“ I dealt with previously but if you are new to this it’s complicated (prices), you don’t understand so for newbies it is quite difficult”.

Staff pages

Unlike the results from the interviews, most participants did not look at the staff details and even most of those that did only gave them a cursory glance. Just one or two thought that it could be useful to check if it was a complicated legal issue or if someone was using a legal adviser for the first time.

Regulatory indicators

Nearly everyone said that they found details of a regulator on most sites. The exception was the unregulated specialist provider and this created some uncertainty for one or two participants, i.e. was it a genuine site?

The SRA was mentioned as the regulator most often and others noted that the national law firm site and one high street law firm site had various other accreditations which was seen as reassuring.

Live chat option

Live chat options are appearing on more and more websites but there is limited enthusiasm for these amongst the group participants. Around a third of participants said that they might use for convenience and for a quick answer, but there were reservations about them especially for detailed cases.

Selected comments

"I am an IT person so I don't like to talk to computers! I would prefer a person or an FAQs. I usually like that I have to wait to speak to someone as I can develop my question".

"For consumer goods they are fine but for a complex matter I would rather have things in writing or face to face rather than a bot".

"The live chat on XX, I presume it's valuable outside working hours but it's a bot and it will get answered. Better than just a contact form and you don't know until you try. I like the idea of it – you don't have to ring or email and you can get some kind of instant answer".

Final choice

Participants were asked "If you had to choose one based just on the website information which one would you choose?"

10 out of 19 chose the unregulated specialist provider because of its simplicity, clear information, and simple pricing. The fact that it offered additional services such as bereavement support and life planning was also a factor.

Four went for the national law firm because of its detailed information and step-by-step approach to the probate process.

Three went for one of the high street law firms again because of its simplicity and clear information.

No one chose the other high street firm because it did not have enough information and

One was undecided.

Evaluating quality of advice

There were similar answers from all groups on how to evaluate quality of advice.

Re-enforcing the interview comments, experience is the term used most often and a general theme is that you have to meet the solicitor or at least talk to them on the phone or by video to judge if they have the quality you are looking for.

Selected comments

"You can't go off the website. I am bit sort of naïve. You have an initial meeting. But I instructed during lockdown so on phone and she said all the right things, she didn't confuse me or baffle me"

"Key factors for me would be approachability, accessibility, the ability to impart complex knowledge clearly and in an easy to understand way, and fair prices".

"Reference to their track record and experience perhaps. I know it's difficult to get companies to tell you and the one that had Trust Pilot all over it is doing that I suppose. If I was going to choose one I could do that. You can't liaise with an online marketing tool you have to get in the door and establish trust and get a good feeling. You need to talk to someone first".

Price comparison and review sites

In two groups, most of the participants were using comparison sites for other things (energy, insurance) and most said that they would be willing to use review sites for legal services. Most participants in the third group, although they use sites for other things, had little interest in comparison sites for legal services unless they were mediated and/or the solicitor had a right of reply.

Selected comments

"You can have a bad experience with a solicitor and a bad outcome and spend a lot of money and have an axe to grind. I would rather the scores and reviews be from professional bodies like Chambers – I don't know what this is but it looks reliable"

"Yes you can review a solicitor. They are providing a service and It would be great to get a review. You will look at good and bad and look at the middle".

"I like the idea of a mediator. It's difficult with a legal service. If you lose a case you can be aggrieved with a solicitor even if they did a good job. But some sort of mediation".

Digital delivery of services

There was a general view in all three groups that more digital delivery is coming anyway and COVID-19 has increased the likelihood of this.

Most participants would be happy with this and would be confident to use services this way from emails, online portals through to video/Zoom calls as long as the service was efficient.

However, most would still expect to see their legal adviser at the start even if this was only in a video/Zoom call.

In one group, discussion turned quickly to price with the group agreeing that if more or all services were delivered digitally then this should be reflected in the price, i.e. reduced fees.

Selected comments

" I was in another country and had a property in London and a solicitor in Wales. I never met her face to face and everything was by email. I didn't have a relationship so if I had a question it was email and left with her. It was all fine. So Zoom first would be good but then online".

"I would want the video chat option as a jumping off point. I would want to get a feel for the person so need video. And agree with others that this should reflect in price".

"Key thing is to know they are dealing with my problem and I getting something personal back for me. As long as they know I am their focus of attention. Online is fine".