

INDUCTION ROADMAP

Fast track for clients of family lawyers and wills and estate lawyers.



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How does it work?

Settify can be accessed by clients and potential clients in two ways: via a link on the law firm's landing page or an email invitation directly from the law firm. In both cases, clients/potential clients are redirected to a Settify controlled landing page (which can be tailored to have a similar look and feel to the firm's website).

From there, clients/potential clients are invited to answer a series of questions which then change based on the answers provided.

The questions are divided into a series of areas that make up the client's Induction Roadmap. In total, the full induction questionnaire may take up to 45 minutes to complete. At any point, clients can add a password and save their progress. Or, on completing the initial base series of questions and providing contact information, clients can have an initial free report emailed to them, regardless of whether they engage the firm or not. At any point, clients can also click on a link to make an appointment with a lawyer at the firm.

For family law, the detailed areas covered include: children, living arrangements, assets and liabilities, parenting goals, future needs, contributions and contact details. For wills and estates, the detailed areas covered include: children and family, relationships, assets, wishes, future planning and contact details.

Lawyers then log into their Settify portal to view a report that compiles all the information entered by the client. As well as an initial summary, the amount of detail that is provided in the report is substantial. For example, for assets, not only is an estimated value able to be included but clients are asked their level of confidence in the value and what evidence they have of the value.

The information in the report can be converted into various formats including pdf, word, excel and CSV. In some cases, notably for users of Lawmaster, the data can also be automatically added into the firm's practice management system. Settify is currently working with Filepro and Affinity to add this functionality for users of those systems.

Benefits

Settify is an off-the-shelf client induction and data collection process with no modification or bespoke elements required to begin using. It can potentially convert visits to a firm's website landing page into clients through the automated induction process. It saves time in collecting, via a tailored AI decision tree, the necessary and relevant information direct from the client without staff or lawyer time being occupied.

It allows a lawyer to get across the matter much more quickly than if they were asking the questions directly and can also mean that draft documents can potentially be prepared in advance of the first meeting.

It has a property pool calculator which takes all the information gathered and places it into an excel spreadsheet which can calculate the final property and asset division amounts. It does not require installation on any device and can be accessed via any computer or smartphone with internet access.

Risks

Cyber risk, as with any cloud offering, is present as regards confidential and sensitive data moving beyond a firm's internal systems. Settify data is held in Australia in an encrypted format via an AWS remote server. There is the potential for the system to be off-putting for early stage potential clients who might merely be browsing firm web pages but inadvertently end up being probed. Given the detailed information that is provided by clients, firms should determine that there is no waiver of legal professional privilege via the process.

Costs

Settify charges an initial customisation fee to integrate the system into a firm's practices which is dependent on the size and nature of the firm. Thereafter, there is a monthly support fee of \$99 and a per client fee of \$99 for family law and \$49/\$75 for wills and estates. The fee is only charged for fee paying clients.

Downsides

The system is only available for family and wills and estate law matters. Settify intends to add probate and personal injury law functionality. Unless the firm uses Lawmaster or creates its own software to transfer the data, the data collected must then be manually re-entered into a firm's practice management system. ■

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SNAPSHOT

What is Settify?

Client induction and data collection tool

What type of technology?

Web portal/cloud artificial intelligence service

Vendor

Settify

Country of origin

Australia

Similar tech products

Automio – allows you to create online forms and portals – <https://autom.io/>

Typeform – online interactive forms and surveys – www.typeform.com/

Lawswitch – legal chatbot – www.lawswitch.com/

Lawtap – online lawyer booking service – www.lawtap.com/au/

Non-tech alternatives

Junior lawyer, receptionist, scripted telephone answering service

More information

www.settify.com.au/

Which practitioners would find this technology useful?

Australian and UK family lawyers and wills and estate lawyers