

PERFECT PORTAL

For client communications this tool offers speed and efficiency.



PETER MORAN

Which practitioners would find this technology useful?

Property/conveyancing, immigration, wills, personal injury lawyers and firms running those types of matters or other highly systemised matters.

How does it work?

The first stage for a lawyer to interact with Perfect Portal is at the time of putting the initial pitch/proposal to a client. The system is designed to be so easy to use that, while on the phone in an initial discussion, the lawyer can enter some basic information and before the phone call even ends, Perfect Portal will have emailed a full proposal for the matter, including a breakdown of disbursements and allocation of fees. In the case of a conveyancing matter, the proposal will even set out the stamp duty and other fees payable specific to that transaction. This allows lawyers to be incredibly responsive and slick in terms of their initial proposals to prospective clients. In terms of making a good initial impression with the proposal document, a system like Perfect Portal is hard to compete with manually in terms of speed and efficiency.

Should the client then engage the firm, the matter will be set up within Perfect Portal. Core stages or events might be pre-loaded based on the matter type or through a communication with the firm's practice management system or can also be entered manually. The client is then provided with access to a mobile app version of Perfect Portal that is accessed from their mobile device.

As the lawyer progresses through the various stages of the matter, Perfect Portal is updated to reflect that progress. Where Perfect Portal is linked to the firm's practice management system (currently Perfect Portal works with Leap and Lawmaster and will shortly work with Practice Evolve), those updates will be entered automatically in Perfect Portal by virtue of the updates within the practice management system's workflows.

Benefits

Aside from providing a good snapshot to lawyers and principals of the status of various matters via Perfect Portal's dashboard, the key benefit of Perfect Portal is the ability for clients to then see that progress themselves. As the stages are updated in Perfect Portal, notifications are texted to clients of those stages occurring. At any time, clients can also open their Perfect Portal app and see the live progress of the matter.

An additional functionality of Perfect Portal is to allow access into the app and the matter to third parties involved in the matter, such as real estate agents. Aside from keeping them automatically updated of the progress of the matter, in situations where the third parties might be receiving remuneration (such as a referral commission) based on certain stages occurring, Perfect Portal allows transparency without extra effort on the part of the lawyer.

Risks

As with all cloud services, there are risks with third parties holding privileged and confidential information.

Costs

The Perfect Portal web portal is charged on a monthly subscription fee for law firms (indicatively, \$150 per month for a firm with three users) and per matter for use of the application by clients. Use of the app by referrers, such as real estate agents, is free.

Downsides

A core downside with Perfect Portal is the double handling that could arise through having to track progress through both a practice management system and Perfect Portal. Therefore, the utility of Perfect Portal is greatly diminished where Perfect Portal is not automatically communicating with and updating itself based on progress made in the lawyer's practice management system. Also, Perfect Portal may not be appropriate to use in less systemised matters and where a higher touch approach with client communications is required. ■

Peter Moran is a principal at Peer Legal and founder of the Steward Guide, an online technology guide for lawyers (www.stewardguide.com.au).

SNAPSHOT

What is Perfect Portal?

A client and referrer communication tool

What type of technology?

Cloud portal and mobile application

Vendor

Perfect Portal (Australia) Pty Ltd

Country of origin

UK

Similar tech products

Emails

Portals that allow access into the matter file itself (eg Red Rain)

File sharing systems (eg Citrix Sharefile)

Non-tech alternatives

Talking to the client directly or via telephone or email

More information

www.perfectportal.com.au