

Quality Control

Pre-Paid Legal to increase technology capabilities

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ADA – By its nature, technology is triggering change at Oklahoma businesses and industries. But a longtime Oklahoma business has spent decades harnessing technology to create the quality it expects.

In the early 1990s, Pre-Paid Legal Services Inc. in Ada launched a software system developed in-house to monitor its provider firms' customer service and quality, as well as providing attorneys information and reports to better serve their clients. That technology has been upgraded over the years as the need arose, and in the next few years, the company plans a software redesign that incorporates its electronic secure transfer capabilities.

Leslie Fisher, vice president of attorney resources for Pre-Paid Legal, said technology is crucial for quality control among its provider law firms in 49 states and four Canadian provinces. The company has invested millions in hardware, software and support, and has no plans of slowing down.

"We're in constant contact with our provider firms – daily, weekly, monthly – and that's all based on technology," Fisher said. "The reason why we have to have a lot of technology is because we get 2.3 million requests for service a year. To be able to manage that high volume of intake with the same high level of service, you must have cutting-edge technology."

When Harland Stonecipher formed Pre-Paid Legal in the 1970s, the company began with an open panel, or attorney of choice, approach, Fisher said. That initial desire to let people choose their own attorney soon changed, because customers (Pre-Paid calls them "members") didn't know who to choose, made bad choices or used up their pre-paid benefits without finding a solution for their problems, she said. In addition, Pre-Paid simply couldn't monitor the quality of its attorneys or meet their training needs with that approach, Fisher said. So in the early 1980s, Pre-Paid switched from attorney of choice to its "provider law firm network system."

"We wanted to have one provider firm per state and develop special software for them, maintain their technology requirements on the telecom side and make sure our members



Employees of Pre-Paid Legal Services in Ada monitor the software system used by its provider law firms across North America.
COURTESY PHOTO

were getting state-of-the-art technology and quick service," she said. "We also wanted to work with the attorneys on their customer service skills."

Pre-Paid developed its software in-house rather than trying to find a commercial product to fit its needs, Fisher said, and its 80-member IT department keeps the technology humming. The monitoring aspect of the software is real-time, and each morning the company gets a report that details how quickly the phone is answered, how promptly a customer's request was handled, when a letter (if required) was mailed out – 15 benchmarks in all, she said, although none of it includes a customer's proprietary information. If something needs to be addressed, Pre-Paid visits with that firm on how to correct it.

The software also tracks the types of issues the provider firms are handling. In the first half of 2010, real estate issues were the leading legal service request among Pre-Paid customers, followed by consumer finance, family law, collections and estate planning. That information helps firms know if they need to hire more attorneys in a certain area of expertise or refocus their priorities in another area, Fisher said.

Melvin Hall, who handles employment law and civil rights issues for Riggs, Abney, Neal, Turpen, Orbison and Lewis in Oklahoma City, said the software system saves his firm preparation time.

"It provides us invaluable informa-

tion," he said. "If a member calls in, we automatically have all their information – how long they've been a member, previous calls they've made, what issues those calls concerned. All of that information helps tremendously to provide service."

Larry Framme of Framme Law Firm in Virginia said Pre-Paid's monitoring approach isn't punitive; if it were, the results would be less favorable. But that information is used to help a firm grow and better serve its customers, he said.

But the outcome of the monitoring isn't only about quality control. Pre-Paid Legal also rewards and trains its provider firms. Attorneys and customer service representatives who score excellent ratings or receive "praise letters" from customers are recognized, and Pre-Paid's WOW: Service from the Heart customer service training is offered at all firms. Some firms opt to extend the training to the non-Pre-Paid part of their business simply because it works so well, she said.

"We have excellent law firms, but sometimes they need a little bit of customer service training," she said. "We've been doing it two years, and we've seen an uptick from good surveys to excellent because the attorneys are learning how to be more compassionate and how to have better communication skills on the telephone."

Pre-Paid will soon redesign its software system for the future. Using

new interface technology, the company will build in its secure file transfer capabilities, Fisher said. Pre-Paid discourages its provider firms from using e-mail, especially on delicate matters, because of its lack of security and concerns about waiving attorney-client privilege, she said. But the next upgrade will remedy that.

"We want to stay up with technology where members don't have to use a fax machine or snail mail, so what we're using now is secure file transfer, and it will be integrated into the software," Fisher said. "We're always trying to stay ahead of the curve with technology to provide better service for our members and have the law firms be more efficient."

Framme said the upgrade will take provider firms into the future without a significant capital investment of their own.

"The expanded services they will offer will not just allow us to record our initial consultations, but be able to do everything as a firm on the program," Framme said. "We'll be able to keep case files in digital format; now, most firms keep them in hard copy form. It's really the wave of the future. Very few have gone to this, but it's where we have to go. All of the provider firms, whether small or large or sophisticated technologically or not, will be able to share the same top-level electronic system as a big New York or Washington law firm. It will take some firms ahead light years in one step."