

LEGAL SERVICES

A better way to deliver important legal documents

Documentd adds a permanent delivery layer to the communications solicitors already use, reducing cost and complexity while giving clients their own long-term copy.

WHERE DOCUMENTD FITS

Use Documentd for the legal documents clients need to keep

Documentd is not for everyday correspondence or documents that are still being worked on. It is designed for important, point-in-time documents that clients may need to retain, review or retrieve long after the matter has closed.

Client care and engagement documents

Executed agreements

Completion statements

Final reports and advice

Settlement agreements

Court orders and key decisions

Other important closing documents

Use email for communication. Use the client portal for active matters and interaction. Use Documentd when the client should receive their own permanent copy.

Illustrative delivery savings assume around four important documents per client matter. Actual savings depend on practice area, matter type, existing processes and costs.

LONG-TERM CLIENT RECORDS

Important legal documents often outlive the matter

A legal matter may last weeks or months, while the documents it produces can remain important for many years. Clients may need to prove what was agreed, understand advice they received, deal with a later transaction or simply retrieve the final record of the work.

Personal to the client

The document is delivered directly to the individual client.

Accessible later

The client retains long-term access independently of the firm's portal.

Reliable historic copy

The sender cannot alter the settled copy.

DOCUMENTD IN PRACTICE

- ✓ The client owns their copy
- ✓ The sender cannot delete the settled copy
- ✓ The original document can be downloaded again

- ✓ The sender cannot alter the settled copy
- ✓ Access continues after the matter has closed
- ✓ Evidence of what was delivered and when is retained

CONSUMER DUTY

It supports clear client information

The SRA requires solicitors to give clients information in a way they can understand and to ensure they can make informed decisions about the services they need, how their matter will be handled and the options available to them. Documentd gives important point-in-time documents a persistent, organised place where clients can review and retrieve them.

Give the client their own permanent record, rather than making long-term access depend on the firm's systems.

01 IF YOU CURRENTLY USE A CLIENT PORTAL

Keep the portal focused on the active matter.

Client portals are built for secure document exchange, review, approvals, messages and interaction while legal work is in progress. Using the portal as the client's permanent archive means extending access, authentication, retention, migration controls and support long after the active matter has ended.

CURRENT APPROACH

Making the portal the permanent copy creates a long-term infrastructure obligation

- Important historic documents need to remain available after the matter closes
- Former clients may need access years after the original legal work ended
- Authentication, password recovery and customer support have to remain available for legacy users
- Retention, audit and administrative controls become part of the portal architecture
- Historic client accounts extend the identity-management and cyber-security burden
- Portal migrations and replacements have to preserve historic document access
- Practice-management and portal changes can complicate access to older matters
- The firm remains responsible for maintaining the entire access environment

ADD DOCUMENTD

Give clients their own permanent copy with Documentd

Keep the portal focused on secure collaboration while the matter is active. Documents can still appear there for convenience, but Documentd separately delivers the client their own long-term copy. Closing the matter no longer has to mean maintaining portal access simply so the client can retrieve important historic documents.

- ✓ Keep the portal focused on active matters and interaction
- ✓ Avoid building permanent-document requirements into the portal
- ✓ Reduce former-client authentication and support
- ✓ Reduce the long-term security burden of historic portal accounts
- ✓ Separate permanent document access from future portal migrations
- ✓ Give clients access independently of the firm's systems

A few pounds

indicative annual saving per client

From avoiding permanent archive requirements, legacy access and associated portal support.

Use Documentd for the permanent copy clients keep, and the portal for the active matter.

LONG-TERM RECORD BENEFIT

Give clients their own accessible historic record without making continued access to important legal documents depend entirely on the firm's live client-portal infrastructure.

CLIENT-SERVICE BENEFIT

Clients retain the important documents from their matter after it closes, without needing to regain access to an old portal account.

COST BENEFIT

A few pounds per client each year can be saved by avoiding unnecessary development, maintenance, legacy access and support.

02 IF YOU CURRENTLY USE EMAIL

Keep the email. Give clients a better long-term service.

Email is effective for everyday client communication. But important legal attachments become mixed into the client's inbox, leaving the client responsible for identifying, storing and finding the small number of documents that may remain important for years.

Around 20p
indicative saving per client matter

Assuming around four important documents per matter and a low level of document-related client-service contact.

CURRENT APPROACH

Email delivers the document, but leaves the client to manage it

- Important legal documents are mixed with everyday correspondence
- Clients must identify which attachments they need to retain
- Historic documents can become difficult to find after the matter closes
- Clients may contact the firm for replacement copies
- Old email accounts, deleted messages and changed addresses can make retrieval harder
- The firm's document-delivery experience ends once the email has been sent

ADD DOCUMENTD

Add Documentd alongside email

Keep the existing email communication. Documentd also places the important document into the client's own organised Keepd account, where it remains available for future review and retrieval.

- ✓ Existing email communication can remain unchanged
- ✓ Important legal documents are separated from everyday correspondence
- ✓ Clients can review historic documents again later
- ✓ Clients can retrieve copies themselves
- ✓ Fewer historic-document and resend requests
- ✓ A better long-term client-service experience

Better long-term client service and lower support cost, without replacing email.

CLIENT-INFORMATION BENEFIT

Solicitors must give clients information in a way they can understand and put them in a position to make informed decisions about the services they need and how their matter will be handled. Keeping important client documents organised and accessible can support that wider objective.

CLIENT-SERVICE BENEFIT

Clients can find and retrieve important documents themselves instead of searching old correspondence or asking the firm to resend them.

COST BENEFIT

Around 20p per client matter in illustrative servicing savings, with greater value where historic-document requests are common.

03 IF YOU CURRENTLY USE POST

Phase out paper where electronic delivery is appropriate.

Paper gives the client something physical to keep, but routine document delivery carries printing, fulfilment and postage costs and leaves the client with another set of records to file and store.

Around £4
indicative saving per client matter

Based on around four posted documents per matter. Postage alone is around this level before printing and fulfilment.

CURRENT APPROACH

The physical delivery process

- Printing
- Paper and envelopes
- Folding and inserting
- Fulfilment
- Postage
- Returned mail
- Address changes
- Replacement copies
- Client paper filing and storage

WITH DOCUMENTD

Replace routine post with Documentd

Where electronic delivery is appropriate, replace routine physical delivery with Documentd and give the client their own permanent electronic copy instead.

- ✓ No printing
- ✓ No fulfilment
- ✓ No postage
- ✓ Immediate electronic delivery
- ✓ Documents remain organised in one place
- ✓ No paper filing burden for the client

Keep the client copy, lose unnecessary printing, postage and paper filing.

APPROPRIATE-DELIVERY BENEFIT

Where an original document or a particular method of service is required, retain that process. For other important documents, Documentd can provide the client with an accessible long-term electronic copy.

CLIENT-SERVICE BENEFIT

Clients avoid unnecessary paper filing and can retrieve important legal records electronically whenever they need them.

COST BENEFIT

Around £4 per client matter can be available from postage alone, with printing and fulfilment savings on top.

THE BUSINESS CASE

Add Documentd where permanent delivery matters

Portal

Keep it for secure collaboration while the matter is active. Reduce the burden of making it the client's permanent archive.

Email

Keep using it for communication. Improve long-term client service and reduce historic-document requests.

Post

Phase it out where appropriate and remove unnecessary printing, fulfilment, postage and paper-filing costs.

Documentd does not ask you to replace systems that already work. It adds a permanent delivery layer that can reduce cost and complexity while giving clients a better long-term service.



Documentd adds a purpose-built permanent delivery layer to the systems law firms already use, reducing cost and complexity while giving clients better long-term access to important legal records.

BUSINESS CASE

documentd.com/business-cases/solicitors

COMMUNICATION GUIDE

documentd.com/industries/solicitors

Illustrative delivery savings assume around four important documents per client matter. Email savings use a low level of document-related client-service contact and an average inbound-call cost of approximately £6. Post savings use current retail Second Class postage as an indicative benchmark; business mailing rates vary. Portal savings are illustrative and depend on architecture, scale and existing capabilities. Where an original document or particular method of service is legally required, Documentd should complement rather than replace that process. Regulatory summary is a practical overview rather than legal advice.