

SOLICITORS

Deliver important legal documents clients can always find

A practical guide to choosing the right approach for client communications, from everyday matter updates and secure interaction to important legal documents clients may need to keep long after the matter has closed.

A COMPLETE APPROACH TO CLIENT DOCUMENTS

Different documents do different jobs

Case management systems, email and messaging, client portals and Documentd each serve a different purpose. The right choice depends on the job: managing the matter, communicating with the client, supporting secure interaction, or delivering an important document the client should retain. Using each in the right way creates a better client experience and reduces avoidable requests for historic documents.



Email works well for everyday communication, client portals for active matters and interaction, and Documentd for important documents that should become permanent, client-owned records.

LEGAL SERVICES IN PRACTICE

Choose the right approach for each communication

Client portals are the right place for secure interaction, document exchange and workflows while a matter is active. Email and messaging handle updates, reminders and requests. Documentd is designed for important point-in-time documents clients should retain after the immediate matter has passed. Using each appropriately keeps the active matter efficient while giving clients a clear long-term record of the documents that matter.

Email & messaging

COMMUNICATE

Best for updates, reminders and communications whose value is mainly immediate.

- Appointment reminders
- Matter progress updates
- Requests for information
- Meeting follow-ups
- Portal notifications

Client portal

ACCESS & INTERACT

The right place for secure collaboration while a matter is active.

- Matter status
- Secure messages
- Document exchange
- Draft document review
- Approvals and actions
- Active matter files

Documentd

DELIVER & RETAIN

For important completed or point-in-time legal documents clients should keep.

- Client care documents
- Executed agreements
- Completion statements
- Final reports and advice
- Settlement agreements
- Important closing documents



Important legal documents should stay with the client. Documentd delivers permanent, client-owned copies into each client's own private document home, where they remain easy to access and find again long after the matter has closed.

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SECURITY & TRUST

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