

TARKENTON CASE STUDY

LEGAL REFERRAL APP DEVELOPMENT

Connecting business owners to local attorneys through a mobile app

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summary.

A Fortune 500 company partnered with Tarkenton to improve its processes for delivering a legal referral service for its business clients. Tarkenton evaluated their manual service delivery step-by-step, mapped a user journey that addressed user experience friction points, designed and piloted a minimum viable product, then developed a mobile app and web-based application to fully automate the client experience. Moreover, Tarkenton continues to enhance the user experience through data-driven insights, as well as providing one-on-one phone service for clients who prefer a personal approach.

the opportunity.

A business services provider approached Tarkenton with the goal of incorporating a legal referral solution into its small-to-mid-sized business service offerings. The partner challenged Tarkenton to research, identify, and conduct due diligence on a suitable legal referral services provider. In addition, Tarkenton would also need to manage service delivery and develop additional capabilities to improve the client experience as needed.

the process.

Tarkenton began this project by searching for a suitable legal referral service partner. We identified a high-quality legal referral service that was looking to expand into the business market. As the two partners' goals and capabilities aligned perfectly, Tarkenton facilitated the relationship and began mapping the ideal client experience for this new service, testing and iterating to evaluate ideas.

In the early stages, Tarkenton assumed the role of service intermediary, handling inbound phone calls from clients and personally connecting them with legal referral specialists, who, in turn, connected the client with a local attorney. We adopted this approach in the early stages to better understand client needs, identify friction points in their experience, pilot improvements, and recommend additional investments in technology to better automate the experience.

After operating, learning, and testing within this model, Tarkenton recommended an investment in a tech-driven experience designed to minimize touchpoints for clients in the legal referral process. Our team mapped out user journeys to identify all possible pain points and developed a proposal for an online and mobile app referral platform that would be fully integrated with our partner's user platform.

Our development team quickly went to work and created the proposed solution within five months of project kickoff.

the outcome.

The legal service quickly proved to be one of the most popular and oft-used features in the partner's service bundle, and has been a tremendous value-add and growth opportunity for our partners.

Performance since developing the online legal referral tool has also surpassed expectations. After the launch of the mobile app and online platform, Tarkenton has continued to offer a personalized phone referral service for clients who are either unaware of the digital platform or prefer the more personal approach; however, in the six months after launch, 86% of referrals were requested and delivered via the digital solution. Call volume decreased 56% year-over-year, dramatically improving efficiency for service and support teams. Further, client satisfaction increased significantly, from a quarterly average of 7.3 out of 10 in the quarter immediately preceding the platform's release, up to an average of 8.8 out of 10 in the quarters following its release.

Tarkenton continues to facilitate the relationship between both partners, hosting training sessions for sales and service teams and webinars for clients to promote utilization.

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