The Receptionist Presents:

Visitor Management for Law Offices

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Chapter 1: Creating a VIP Visitor Experience for Your Clients

As anyone with experience in the legal world knows, law office visitors don’t always arrive for their appointments relaxed and happy.

They’re likely coming in to discuss stressful or important issues that could have a huge effect on their businesses or personal lives. They’re aware that the stakes are high, and they know that the legal services they’re about to get require a huge investment.

That’s why it’s so important for law firms to reassure visitors as soon as they walk through the door. A good first impression will affirm their decision to work with you and set the right tone for subsequent meetings.

By paying close attention to the visitor experience, your law office can make a distinct, professional impression on everyone who walks in.

A complete visitor management strategy encompasses many things that happen behind the scenes. For example, decisions about how to structure front desk staff, set up efficient visitor check-in procedures, and observe compliance regulations all play a big role in the visitor’s ultimate experience. We’ll go into each of those “back-end” functions in full detail later in this ebook.

However, perhaps the easiest place to start when it comes to a visitor management is with the front-end experience. Physically walk through your doors and take a look around through potential visitors’ eyes.

Is there an attention to detail and professional aesthetic that inspires a sense of trust? Here’s what to consider.

Choosing a Lobby Style

Most law firms want to come across as traditional, serious, and professional. For that reason, they tend to choose traditional office decor and layouts, from dark wood bookshelves to rows of private offices with closed doors.

However, law offices don't always have to opt for big mahogany desks and library lamps to make the right impression. As corporate culture moves to adopt the office vibe prevalent in Silicon Valley (open spaces, playful and creative decor), some law offices are adapting to more modern office design trends as well.

These law offices may feature floor-to-ceiling glass walls for more natural light, plenty of clean lines and good use of space, and furniture with interesting texture and colors.

When choosing a style, the most important thing is to think about which type of clients you want to appeal to, and what they might like to see or expect to see from you.

For example, a more modern design might lend itself perfectly to a firm serving startup tech companies. And luxury touches like opulent bouquets, leather couches, and premium sparkling water in the lobby might be perfect for a corporate attorney serving high-powered CEOs, but not as appealing to a firm that tries to serve non-profits or families.

Paying Attention to Detail

The decor is a start, but there are other details that make a big difference in the visitor experience. A little empathy goes a long way.

For example, when people wait in your lobby, do they have a convenient place to charge their phone, or do they have to scuttle along the floorboards in search of an outlet? Is it clear how visitors can help themselves to refreshments or find the coffee machine?

Pay attention to detail.

Are visitors presented with a clipboard with a sign-in sheet and pen on a string, or a sleek tablet loaded with a sophisticated check-in system? Are the signs for the building directory and the conference room standard plastic signs, or are they interactive digital displays?

Upgrading details like these to impress visitors and make your office a more pleasant place to work can make a big difference.

Creating a Professional and Efficient Check-in Experience

The next steps in creating an effective strategy are to hire the right kind of people and create visitor procedures that make the check-in process as smooth as possible.

With the right tools, people, and processes, your visitors will breeze through the check-in process with no frustration and minimal wait times. They'll feel welcomed, valued, and validated in their choice to work with your legal team.

In the following chapters, we'll dive into the specifics of how to structure both your staff and your procedures to get that kind of result.

Chapter 2: The Best Way to Structure Your Front Desk Staff

An expert receptionist can be a huge advantage for your law office. But smaller practices may not have the space or resources to dedicate a full-time employee to this role alone. The right staffing solution will depend on your firm's budget, office layout, and brand.

There are three general options for structuring the front-desk staff for your law office.

1. The Full-Time Administrator

A professional, attentive receptionist can be a great asset to your practice, and can send a message to visitors that your firm is financially successful.

Even if your office doesn't have a sky-high budget, you may still be able to afford to keep someone available for visitor management full-time by combining the role with other essential tasks.

Here are a few jobs that could be ideal for delegating to your front office staff other than visitor management, phone call management, and mail routing.

Legal Secretarial Work

While bigger firms may have enough work to justify a full-time position dedicated solely to working the front desk, smaller firms with lighter visitor traffic often employ legal secretaries or even paralegals who do receptionist-type work when needed. These employees may also be trained in more specialized tasks such as legal transcription and proofing, case preparation, and filing court documents.

Office Management

Legal office managers typically manage things like physical office upkeep, such as break rooms or shared equipment (i.e., copier or video equipment) and make sure the whole staff has supplies to do their work well. They may also be responsible for the organization of office data, via filing, shredding, or digitizing documents, and maintaining client files.

Human Resources

Your receptionist may be able to take on tasks like payroll, benefits enrollment, hiring paperwork / onboarding, tracking vacation days and sick days, reimbursing expenses, planning employee travel, and implementing staff training. In many offices, this role also extends to things like acknowledging important events in employees' lives, such as birthdays, work anniversaries, and new babies.

Executive Assistance

In this role, a receptionist might manage attorneys' schedules, make calls on their behalf, and oversee their schedules as the day progresses. Other helpful duties may include planning travel and writing and disseminating official office communications from the firm's leaders.

However, overloading the receptionist could backfire. Their primary role should be visitor management, so they will be interrupted frequently. Giving them work that requires long stretches of deep concentration will lead to frustration and resentment on behalf of employees and visitors.

2. The Part-Time or Remote Receptionist

If you can't justify hiring a receptionist full-time, you can still get many of the same benefits by hiring someone with the right part-time schedule.

If you use visitor management software, you can run reports to figure out the busiest times of the day, week, month, and year. Structure the receptionist's schedule around those times and encourage your staff to schedule visits for the hours they're in the office.

You may not even need to hire an on-site receptionist. Technology has made it easy for administrators to get much of their work done from any location. Virtual assistants can work on many of the other tasks just listed from home and file their work electronically. They can also receive and process the law office's phone calls

from anywhere.

For solo practitioners or small practices, hiring remotely can lead to valuable savings not just on salary, but on other employment costs, such as office space and equipment.

3. The Virtual Receptionist

All receptionists, full-time and part-time, must occasionally step away from their desks. If visitors walk in and encounter the receptionist in the middle of a personal phone conversation or with a sandwich in their hand, it won't look much better than if the desk were empty.

For that reason alone, many companies are leveraging visitor sign-in kiosks that allow visitors to begin to check themselves in for meetings, appointments, deliveries, and more. These self-check-in stations can give visitors instructions and even connect them directly to their hosts.

These kiosks can make receptionists' jobs easier (which leaves them more time to do their other work) and can be a great stand-in when the receptionist can't be at the front desk.

Although a self-check-in kiosk can never fully take the place of a human receptionist, in some cases, law offices may find that it's a suitable standalone option.

Tablet-only kiosks may be particularly appealing to firms without much lobby space (removing a desk could make for more seating), with relatively low visitor traffic, or to offices that specialize in helping more budget-conscious clients.

In the end, whether it's necessary to hire someone to attend to visitors may depend on:

- how many visitors you have each day
- how long it takes to check them in

- the potential costs of unwanted or unexpected visitors wandering into the office, interrupting employees and possibly threatening security

For law offices, those security costs can be significant, as we’ll discuss next.

Chapter 3: Visitor Security and Compliance

Attorneys have plenty of compelling reasons to know who is on the premises at all times, and why.

Just like every other company, law offices have an interest in keeping their employees and assets safe from potential criminals.

But even well-meaning visitors can be exposed to confidential information if they wander into sensitive areas unannounced. In those scenarios, it's easy to overhear a conversation or see a file that wasn't meant for them.

Plus, lawyers should know that letting visitors wander into a building without proper credentials invites other risks. If you don't know someone is in the building, they can't be evacuated safely in the case of emergency. Visitors should ideally be briefed on expectations of safety, privacy, and confidentiality before they step inside.

Here are steps to take to ensure that visitors can only access your law office once they have been properly checked in.

1. Identify and Secure the Visitor Entry "Path"

It should never be unclear to visitors where they are expected to go (and not go) during their visit.

Bigger law firms could designate visitor-specific parking areas and even a visitor-only entrance to give front-desk workers the ability to focus on their needs — and prevent visitors from tagging along with groups of employees.

But even smaller firms can add delineations in their lobby that make it clear that visitors are not to go past a certain point without authorization.

You can create barriers between the lobby and the rest of the office with doors, walls, signs, or other barriers (such as large planters).

Here are some other security measures to consider:

- Limit unauthorized and unmonitored entry points as much as possible.
- Add signs and alarms to fire exits.
- Use "natural access control" techniques, such as landscaping, walkways and barriers to funnel visitors into an area with great visibility and no potential hiding spots.

We discuss even more physical security tactics on our blog.

2. Establish Visitor Identification and Escort Procedures

You'll have to decide the criteria for issuing visitor access to your law office.

For many firms, receptionists simply check with the host that the visit is expected, and that the visitor is indeed who they claim to be.

If your check-in software can take visitor photos, those can come in handy for identification purposes. Your staff may be able to show the photo to the host to confirm their identity before they're given access to the interior of the law office.

You may want to create a policy that requires visitors (or even certain types of visitors) to be escorted to their host or to their destination and back out again.

Larger firms may opt to require all visitors to wear badges with photo IDs to make it even more clear which visitors have checked in, and why they are on site.

3. Include Visitors in Emergency Procedures

In case of an emergency, visitors will need to be moved to safety and accounted for along with the rest of the staff. In the U.S., the Occupational Safety and Health Administration stipulates best practices for emergency plans, such as clearly marked routes to exits and regular drills. There should be distinct plans for visitor evacuation, shelter-in-place, and lockdown.

Whoever is in charge of the facility evacuation list should also have a real-time list of visitors to check against the people who have evacuated to the safety area. This can help prevent a lot of confusion during an emergency and even prevent risky search-and-rescue missions.

4. Create a Visitor Agreement

Adding a general visitor agreement policy to the sign-in process can be a good way to make sure that clients understand appropriate behavior while they're on site.

The safety policy could include prohibited actions, such as smoking or carrying firearms, and any confidentiality responsibilities.

By agreeing to the visitor policy, visitors acknowledge that they are aware of any risks and will abide by rules and emergency procedures.

Make sure to keep a clear record of this visitor agreement, as well as other visit details, as we'll discuss next.

Chapter 4: Administrative Efficiency and Confidentiality in Visitor Management

Although branding, staffing, and security efforts are all essential pieces of your visitor management effort, the heart of your visitor management strategy is the administrative work required to schedule and check-in each visitor.

Good administrative policies will establish how to collect, organize, and store relevant visitor information clearly, efficiently, and confidentially.

Here are key practices to incorporate into your office administration when it comes to visitor management.

Visitor Classification

Perhaps the most important step you can take to improve your check-in procedures is to tailor them to specific visit types.

For example, if someone is just making a delivery, there might be very little information collected. The front desk staff could simply escort the delivery person to their host and back out again, or wait until the host comes to the lobby to claim the delivery.

If someone arrives for an initial legal consultation, however, you'll collect more detailed information about their legal needs.

Make a list of all the types of people who visit your law office throughout the day, week, and year, then tailor a check-in procedure for each type.

Here are a few ideas for visit categories:

- new clients

- returning clients
- job interviews
- building maintenance / contractors
- deliveries
- executive meetings

Visitor Pre-Registration

Encouraging attorneys to register visits ahead of time makes check-in easier and more pleasant for both front desk staff and visitors.

When receptionists know exactly which visitors are coming and when, they can get the right paperwork ready and even give visitors a warm, personal greeting when they arrive.

This kind of thoughtful preparation also shows visitors that you respect their time.

Visitor check-in apps make it easy for hosts to schedule upcoming visits, adding the visitor's name, contact information, and other relevant details into the web-based program. Then, visitors can simply approve the details upon arrival.

Visitor Fast-Tracking

There should be a process in place to fast-track returning visitors so that they don't have to repeat the check-in process over and over again if it's not necessary.

Visitors should be able to opt in to storing their visitor information with the front desk, and specify how long the information should be stored (to protect privacy concerns).

Modern visitor management software can even track when regular visitors need to re-approve visitor agreements or update their information, and prompt them to do so as necessary.

Quick and Efficient Notifications

Who should get notified when visitors arrive, and how do they want to get the message? That all must be decided well in advance of any visit.

Many attorneys appreciate getting a text message when their clients stop in to see them, because they'll get notified even if they're away from their desk or in court. Other types of visits, such as package deliveries, might only necessitate an email notification.

Clarify which notifications attorneys prefer and for which visitor types, as well as what to do if the host doesn't respond to the notification.

Some visitor management programs actually let visitors communicate with their hosts directly through a chat window in the sign-in tablet.

Visitor Confidentiality Protections

Your law office has a professional obligation to keep client information private, and that extends to visitor data as well.

First, make sure that the names on the visitor log are never visible to anyone other than that visitor and your office staff. Using a check-in app instead of an outdated paper pad can be one good way to ensure that visitor details are kept confidential.

Also, as we mentioned, you must also specify which visitor information should be stored in your system, if any, and how long you will keep it there before it's deleted.

Certain privacy laws, such as the General Data Privacy Regulation in Europe, may also regulate this kind of personal data storage.

Clear Document Management and Recordkeeping

A good document management system will specify how your staff should handle all client information, including visitor records.

It will specify how files should be stored, organized, backed up, retrieved, and eventually destroyed or transferred.

For more on how to create a knowledge management database and file retention policies, check out our blog post on how to protect your legal clients' privacy.

Armed with these administrative best practices, you are ready for the final step, which is to constructing the actual check-in procedures.

Chapter 5: Building Your Check-In Procedures

It’s time to get specific with exactly what needs to happen when each visitor arrives at your law office. Here are the steps to take.

1. Identify and Categorize the Visitor

If you’ve laid the groundwork correctly, your front desk staff will know exactly what to do to verify that any visitor is authorized to check in. Ideally, visitors will have been pre-registered. If not, receptionists should know exactly which questions to ask to classify the visit and get them started on the check-in process.

2. Collect Visit-Related Information

The information you collect from the visitor will depend on the reason for their visit, but offices generally collect some form of the following:

- **Visitor Type / Purpose -** Visit classification can streamline the check-in process, and collecting data about which types of visits happen and when can be valuable for future planning and staffing purposes. Some offices may also want to note visitor type on visitor badges.

- **Visitor Name -** This field is mostly for records and identification, and should be cleared at some point according to your privacy policy.

- **Visitor Photo -** A quick photo taken when upon arrival can be good for confirming visitor identity, or even for allowing the host to know who to look for in the lobby. If can also be printed on a badge to verify that the badge belongs to its owner. Ideally, it will be impossible for the system to issue a badge without a

- clear view of the visitor’s face in the photo. If there’s no human to verify a clear

- photo, facial recognition software may be able to do the trick.
- **Date and Time of Check-in** - This information is often timestamped automatically by visitor management software. It's important to note this on visitor badges for larger firms to indicate that they're current. Dates and times can also reveal visitor trends that can be helpful for future planning.
- **Client Intake Information** - If this is a new client, you can specify whether to collect information about their legal needs upon check-in.
- **Visitor Details** - The visitor's name and check-in details may not mean much without additional information, such as their company name, their position, and the name of the person they are visiting at the host company.
- **Who They're Visiting** - Note the visitor's host for verification and records purposes.

3. Notify the Host

Visitor notifications can happen automatically through text, email, or chat app if the visitor signs in with visitor management software, or they can happen manually with the help of a live receptionist. Regardless, the notifications should follow a consistent, pre-decided protocol so there's no confusion.

4. Collect Signatures on Agreements or Policies

In Chapter 3, we mentioned a general visitor agreement. Some firms may choose to add individual agreements such as liability waivers, non-competes, privacy policies, and non-disclosure agreements. The type of agreements required will vary based on the type of visit. Any room for confusion could lead to omissions that leads to serious problems down the road, so make sure the protocol is clear.

5. Issue a Visitor Badge

If you work in a bigger firm or have significant security concerns, all visitors should wear badges. Choosing a software program that has a custom, drag-and-drop visitor badge template editor is a great feature. These programs require no coding, design, or programming knowledge to produce, and if they're integrated into visitor

management software, the badges can be printed automatically as part of the check-in process.

Test any new visitor badge design to make sure it's legible and that people can quickly determine whether the badge is legitimate from a reasonable distance.

Firm leaders must personally enforce any visitor badge policy, as any inconsistency in the policy can quickly render the whole thing completely ineffective.

6. Welcome and Escort the Visitor

Once the visitor has finished checking in, the receptionist can either escort the visitor to their destination or invite them to make themselves comfortable as they wait for their host to come get them in the lobby.

Review and Improve

A visitor management strategy isn't something you can create and let run on autopilot. It requires ongoing maintenance.

Your law office's visitor management needs will change in light of new regulations, client demographics, and practice areas.

Once you've established your procedures, see if there are ways to make them easier, quicker, or more pleasant.

Continuously empathize with visitors and respect the opinions of the front desk workers who manage them every day.

Chapter 6: How The Receptionist for iPad Handles Visitor Management at Law Offices

When people walk into your law office, they need to know that they're dealing with professionals. They need to know they can trust you.

If you fail to impress and reassure your law office visitors, you may find that they're more susceptible to being lured away by competitors.

Thankfully, visitor management software makes it easy to wrap up the administrative, security and branding requirements of visitor management into a pleasant, efficient process for everyone.

With The Receptionist for iPad, you can create a custom button and check-in process for each visitor type. You can change any of the data fields, add custom text, add videos, add legal agreements and collect signatures, and even take a visitor photo — all customized to the visitor type.

You can also pre-register VIP visitors or expedite the check-in process for regular visitors.

The Receptionist makes it easy for visitors to check themselves in on an iPad. Administrators can set up custom notifications for the rest of the staff using Slack, SMS, or email. These notifications are sent automatically when visitors check in. You can notify by group, establish back-up contacts in case the first contact isn't available, and even choose how long to make the system wait before it notifies each contact. Visitors can even chat with hosts directly via the tablet.

If you choose to issue visitor badges, those can be printed seamlessly at the end of the visitor check-in process.

A dynamic reporting system gives detailed insights into visitor patterns, and your staff can access a real-time list of visitors, which is essential in the case of an emergency evacuation. Administrators can choose how to have the software automatically clear out stored visitor data to comply with privacy best practices and regulations.

Plus, all features and unlimited customer support are included in every plan, even the free 14-day trial. Click here to start your trial, or contact us for more information.

Robinson Bradshaw, a corporate law firm in North Carolina, uses The Receptionist for iPad at all three of its locations.

Bobby Hendrix, the firm's mobile device specialist, explains, "Clients appreciate privacy when they come into the office, so we didn't want to compromise client confidentiality with a sign-in sheet at reception. We like being able to provide clients with The Receptionist's private and convenient method of signing in."

Intellectual Property firm Martensen IP also loves The Receptionist for iPad.

Michael Martensen says, "It has worked tremendously well. When a client comes into the reception area, we immediately receive an alert that someone is waiting. Even when we know they're coming, this gives us the opportunity to put away any confidential documents. It also ensures our paralegals can focus on their paralegal work. I can't imagine not using it. I've even recommended it to my own clients."

If you're ready to see what The Receptionist can do for your law office, click here to start your trial, or contact us for more information.

Andy & the Team at The Receptionist

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Chapter 7: Questions and Answers about The Receptionist

If you're unsure about whether The Receptionist will work for your law office, we can help. Here are a few "frequently asked questions" from people who want to try our visitor management software.

Is this program designed to replace your receptionist?

Definitely not. You can check our detailed response to this very question on our blog, but in short, we want our software to be your receptionist's most valuable asset. Your front-desk staff has many responsibilities, including staying alert and aware of the surroundings in the lobby. This tool helps them move visitors through quickly and efficiently so they don't get bogged down in tedious paperwork. It also gives them unique insights into who visits and when so they can work to streamline overall visitor management strategy.

What physical equipment do I need to make The Receptionist work?

You need an iPad and an iPad stand (either for the desk or the floor) and a badge printer. We've made it as easy as possible for companies to get the equipment they need with our Receptionist in a Box.

You can also use your own iPad if it runs on iOS 8.0 or higher. This includes the iPad Mini, iPad Mini 2, iPad 2, 3, 4, iPad Air, iPad Air 2, and iPad Pro. No Android tablets are supported at this time -- but we've found that most companies prefer to buy a new, dedicated tablet for their reception area anyway.

You can update The Receptionist for iPad's settings (along with all account details) from any internet-connected computer via TheReceptionist.com. Only a few settings need to be updated using the tablet itself.

Is support included?

Absolutely. We want to show you how much we care, and the best way to do that is to be here when you need us. We believe that we have the easiest, fastest set up on the market. To prove it, we offer free unlimited support (even during your free trial) to answer any questions you have.

How much does The Receptionist for iPad cost?

We charge per month, per location. The only difference between plans is the number of people at your location who are registered in the system to receive visitors.

Plans are currently $49/month for up to 24 registered employees, $99 for up to 49 registered employees, and $149 for up to 99 registered employees. If you opt to pay for the whole year, you get one month free.

For more details, or if you have more than 99 registered employees, check out our pricing page.

Do I have to sign a long-term contract?

After the free, 14-day trial, each level of pricing is available on a month-to-month basis, and you can cancel at any time.

Heard enough? Click here to start a free 14-day trial, or contact us for more information.

We hope you’ve enjoyed this Ebook, and we hope to hear from you soon.

Andy & the Team at The Receptionist

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Visitor Management for Law Offices

Try all the features of our tablet-based sign-in app for free.

Start your trial