

## Connected G1

“Hi \_\_\_\_\_. My name is Clayton from MyCase Payments. I wanted to call and see if you have a couple of minutes to share some initial thoughts on the payment service, since you were recently enabled with MyCase Payments.

### Priority Questions:

- ☐ We are trying to make our payments platform better, we have a lot of options and we want to make sure you clients can pay you. what is some of the friction there?
- ☐ Why do your clients pay you a certain way? What is your process for getting paid? How do you tell clients about the client portal?
- ☐ What Feedback or improvements would you like to see with payments?
- ☐ Would you be willing to talk to us in the future to provide feedback on any updates we release?

### Questions

1. **Who is in charge of Billing in the office?**
2. **What type of Law do you practice?**
3. **How are you currently receiving payments?**
  1. Has anything held you back from receiving online payments through the client portal?
  2. What are the reasons why clients have not made a payment online through the client portal?
4. **How have your clients reacted to the client portal and being able to easily access their invoice shared with them?**
  1. How are your clients currently paying their invoices? (Since firm has not had an online payment yet through MyCase)
  2. What types of questions are your clients asking you after you have shared an invoice with them?
5. **How do you tell clients about the client portal and how you will be sharing information with them?**
  1. How has the client portal help you reduce your workload?
  2. **Reason** - (to better understand if clients are having difficulties with the client

portal or if there is other information that the firm could be sharing that they are not)

1. Client Portal Guide (printed or online link), other knowledge center articles, etc.

What should the firm have already seen regarding Payments help links, or documents. (sent out with "take live" email)

2. Payments Guide for Clients & Firms
3. Portal Guide for Clients & Firms
4. Billing & Invoicing Guide
5. Upcoming Webinars
6. Pre-recorded "how-to" videos

**4. In your opinion, are your clients using the client portal regularly (logging in at least once a week) and using it as you had intended?**

1. How has the client portal benefited your firm for receiving payments and getting paid quicker?
2. How can we improve the client portal for you to better use it with your firm.
3. **Reason** - (to better understand if it is a client portal issue they are having)

**5. How would you like to see payments working for you?**

**6. What Feedback or improvements would you like to see with payments?**

**7. Would you be willing to talk to us in the future to provide feedback on any updates we release?**