:talkdesk® | ⬡ LegalShield™

LegalShield's three lessons for propelling CX forward.

Use case
Support & Services

Industry
Business Services

Integrations
Calabrio Workforce
Management
Sentiment.io

Key metric
↑ Service levels improved
 by 4%
↓ Lowered call transfer
 rate by 5%
↓ Reduced abandoned
 call rate to 3.5%

Putting the right people in the right place at the right time leads to positive outcomes. But when those things don't fall into place, the outcome can be less than ideal— and when the situation involves navigating the legal system, the result can be disastrous.

Since its inception, Pre-Paid Legal Services, Inc. (PPLSI) has been dedicated to breaking barriers in the American legal system and providing support for those who need it most. PPLSI is the parent company of two unique brands: LegalShield, which offers pre-paid legal service plans for individuals, families, and small businesses and IDShield, which offers privacy management services. The company is home to approximately 650 corporate team members, 6,000 partner lawyers, and a national field of 250,000 active associates, all working together to ensure that everyday Americans can afford access to legal services. For over 50 years, LegalShield has been providing affordable legal services to millions of people.

Today, the company serves more than 1.7 million members and 140,000 businesses across the U.S. and Canada. LegalShield continues to innovate, finding new ways to make legal help accessible to all.

Price is a major factor when offering quality legal protection at a great value, but it's just as essential for customers to have a good experience.

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"We want to differentiate ourselves against our competitors by our customer service."

— **STEPHANIE GACCETTA,** VICE PRESIDENT OF CUSTOMER CARE, LEGALSHIELD

In addition to powering the platform, LegalShield educates and trains provider law firms on the best ways to connect with members and present information clearly. When members approach a situation with their eyes wide open, they get the most value from the legal services available.

A good customer experience typically starts with the CX team. LegalShield's CX team always strives to go above and beyond for members, but they didn't always have the support they needed from their technology partner.

Searching for a more responsive and innovative partner.

Before 2021, LegalShield used NICE inContact in their contact center. They experienced a lot of downtime and didn't receive much support on specific issues or when trying to crystallize a long-term vision. There was no engagement to discuss their present needs or future plans, and the product alone wasn't going to be enough as they scaled.

"We were looking for more of a personal relationship with a company that we could partner with to evolve and grow," Gaccetta says. LegalShield also wanted to expand into a complete omnichannel offering to obtain a holistic view of customer engagement, and they wanted a partner to accompany them on that journey.

The LegalShield team reviewed many solutions on the market, and Talkdesk rose to the top. The platform had a proven track record for uptime and resiliency, and the Talkdesk team was known for being responsive and proactive with support. LegalShield spoke to existing Talkdesk customers and the feedback was unanimous.

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"We heard a common theme of a passionate company focused on making sure customers were happy."

— **PAT PATTERSON**, CIO, LEGALSHIELD

Talkdesk also offered robust omnichannel capabilities, and the innovative features in the product roadmap sealed the deal. LegalShield jumped into their implementation with both feet, and they've seen improved uptime and customer support. The LegalShield team also realized some new opportunities—and learned some valuable lessons as they went along.

Lesson #1: Lean into self-service.

One of the biggest leaps CIO Pat Patterson has noticed since switching to Talkdesk is the number and quality of self-serve capabilities. These options allow their contact center agents to make changes as needed rather than waiting on the technical team. That has significantly shortened the time it takes to see the impact of those changes on operations.

To achieve the leap, LegalShield adopted Talkdesk CX Cloud, Customer Experience Analytics, Proactive Outbound Engagement™, and Quality Management™. LegalShield also uses Talkdesk Digital Engagement™ through integrations with Talkdesk AppConnect™ solutions, Sentiment.io OmniChannel, and Calabrio Workforce Management.

It's also much quicker for LegalShield to implement different messages through their IVR since moving to Talkdesk. A request that used to take five days to complete now takes one, on average. This is a big win for internal teams, as it allows LegalShield to provide relevant messages to their members much faster.

Talkdesk also makes it easier for LegalShield's Director of Operations, Misty Medeiros, and her team to examine and resolve member issues faster by offering visibility into every step of the customer's journey. "That's been a huge win because we can go in and investigate before passing it over to IT," she says.

LegalShield started with a great out-of-the-box cloud contact center platform and they are now fine-tuning it for their use case. The next step for LegalShield is to leverage more data and enhance AI to inform call center operations and expand member self-service options. The call center team is looking at AI decision paths, introducing keywords, and tweaking attributes to improve recognition matching. "AI is an evolutionary element, so it's constantly learning and evolving as activities are going on," Patterson says. All of their changes help to refine the base of information that serves as the knowledge center for the AI solution—essentially creating a source of truth that the AI platform can leverage.

Lesson #2: Take the time to understand the technical elements.

LegalShield has come a long way, and they moved quickly from the beginning. The Talkdesk implementation only took a month, including introducing specific accents to the new platform.

Thinking back, Medeiros said they would have leaned more on the Talkdesk implementation team and asked more detailed questions. Adopting many solutions at once made for a steep learning curve, even though they tried to prepare as much as possible for the implementation. Still, the team believes it's easier to undergo one extensive implementation rather than several smaller ones over a longer period, and Talkdesk readily helped when LegalShield got stuck.

At one point, LegalShield ran into an issue when transferring calls to another department. The transferred call would not join the queue, so if the call center was busy and the agent receiving the transfer was unavailable, the call would drop and require a callback. Talkdesk worked with LegalShield to find a solution: using Talkdesk Studio flows to transfer calls to a ring group, which routes different types of calls to agents with relevant skills.

Instead of delivering a product to LegalShield and moving on to the next sale, the Talkdesk team stood by LegalShield as they navigated the new features and engaged in big-picture conversations about the best ways to achieve their objectives. "We continue to have multiple meetings every week with them," Gaccetta says, a significant benefit of the partnership, especially compared to the lack of engagement from their previous vendor. Medeiros agrees:
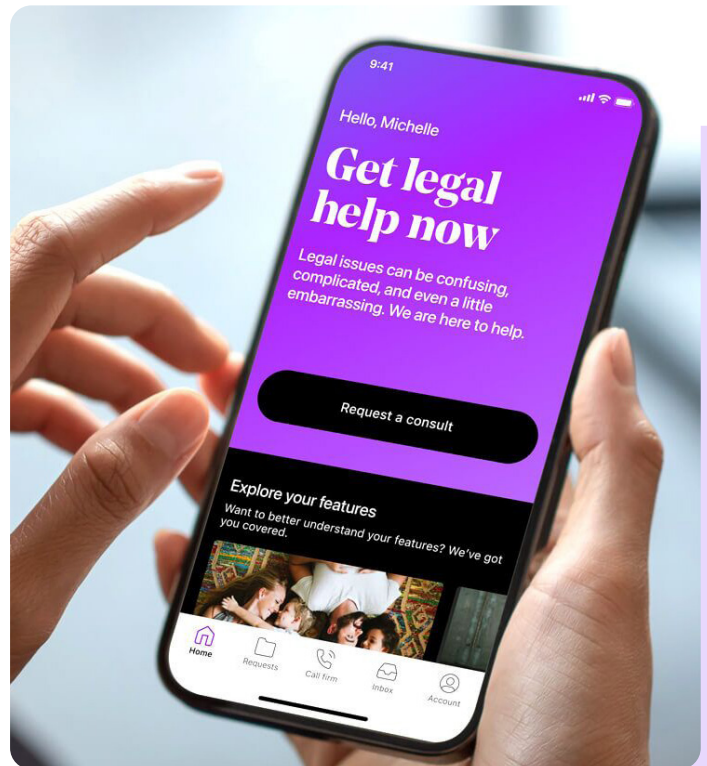
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"The support's been phenomenal. We've had a very strong partnership that's grown from that initial handoff through implementation."

— **MISTY MEDEIROS,** DIRECTOR OF OPERATIONS, LEGALSHIELD

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"Comparing the support of NICE to Talkdesk is 'like night and day.'"

— **MISTY MEDEIROS,** DIRECTOR OF OPERATIONS, LEGALSHIELD

Lesson #3: Find the right people to make the technology work.

LegalShield has evolved dramatically over the past few years. They've made significant product enhancements that have led to improved contact center metrics, and their new capabilities from Talkdesk have played a role in that.

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"It's been about the people: our agents, the customers we're trying to care for, and the partner we have in Talkdesk."

— **PAT PATTERSON,** CIO AT LEGALSHIELD

They've seen a call volume reduction of 10% in the first year of implementation, with a further 8% reduction projected for 2023. Call transfers decreased by 5%. Staffing is more streamlined, with overall staffing reduced by around 22%. Despite these reductions in staffing, abandoned calls went down by 3.5% and service levels improved by 4%, resulting in LegalShield meeting their service level goals. Finally, chats are steadily increasing month-over-month, with an increase of 154% in recent months compared to 2022's monthly average.

LegalShield needed a better product and a better partnership to do right by their customers. In choosing Talkdesk, they put the right people in place to get the most out of their technology. And with the right people in the right place, LegalShield can push their CX forward and deliver the most value to their members.

:talkdesk®
Experience. A better way.

Customer stories:
LegalShield

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