Payment Discovery Calls

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?

#0. Research firm activity, cases, and contacts. Pull up website to find practice area.

a. Ask for contact that contacts mycase the most often. If not available find out who does invoicing at the firm.
b. What type of Law do they practice?

#1. Do they have time

a. "Hi ________, This is ________ 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. (or see if I can answer any questions you may have)?"

#2. Why I am calling

a. "We are curious about how you go about billing your contacts or clients. How are you using the MyCase Platform, or even if you are not using it, we would like to understand your process for invoicing better." (That way we can make changes to the grow our platform and ultimately make receiving payments easier for you.)

#3. What is their process

a. How would you describe your current process for invoicing your clients?
    i. Are they using mycase payments?
        1. Yes? (not group one)
            a. Understand their process for going through the process of invoicing a client. (How have you experienced difficulty or friction when enabling an invoice to be paid?)
            b. "How has the client portal helped reduce your workload?"
                i. Do they have the CP guide?
                    1. "How are you currently informing and sharing the CP with your clients?"
                ii. Are they aware of webinar?
        2. No?
            a. If not, "how are you currently receiving payments?"
                i. Are they enabling it to be paid online?

1. If no, is this purposeful? If so, why?
    a. What service are they using to take these payments?
    b. How much time are they taking to reconcile?
    c. Are they informed of how MyCase Payments works, and that it automatically does the reconciling?

#4 . We want to make this process useful.

a. How have your clients reacted to the CP and being able to easily access invoices and documents that are shared with them?
b. What is some of the friction you are seeing with clients getting you their payment?
    i. Find out if that friction is from CP
c. Where have your clients had a hard time or where have you had any difficulties with the client portal?
d. How do you currently inform your clients about the client portal?
e. How do you think can we improve our payments?

#5. Release

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