

The Family Law Unbundled Legal Services Research Project (ULSRP) – Phase 1 Report

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Background:

The [BC Family Unbundling Roster](#), the Lawyers' Toolkit and the Clicklaw Helpmap were developed as part of a Mediate BC project funded by the Law Foundation of BC and the Law Society of BC. As of November 3, 2021, the Roster has grown to include over 180 legal professionals from all around the province.

In the fall of 2017, the Access to Justice BC ("A2JBC") [Unbundling Working Group](#) was created to focus on unbundled legal services ("ULS") as a response to the access to justice crisis. The Unbundling Working Group includes individuals with lived experience, family law lawyers engaged in providing ULS and representatives from justice system stakeholders¹.

In partnership with the Working Group, and with funding from the Law Foundation of BC, People's Law School created a public-facing unbundling website launched in early 2019:

<https://unbundlinglaw.peopleslawschool.ca>

Since the Roster had been operational for approximately three years, the Working Group determined that an important next step was to evaluate unbundled legal services in BC. In July 2020, the Family Justice Innovation Lab Society, in collaboration with the Working Group and Standpoint Decisions Inc., made application to the Legal Aid BC / Law Foundation of BC Research Fund for this collaborative project.

The proposal anticipated a two-phase approach: Phase 1 was intended to test and demonstrate the value of the proposed prototype for continuous client feedback. If Phase 1 revealed promising information, funding for a larger grant would be sought for Phase 2 which would build out and scale the prototype to a larger group of service providers.

The purpose of this document is to provide a detailed report for Phase 1, and act as the foundation for Phase 2 funding which is found in the accompanying document.

The team gratefully acknowledges the support and funding from the Legal Aid BC / Law Foundation of BC Research Fund which made this initiative possible:

Legal Aid BC
Support when you need it



THE  LAW
FOUNDATION
OF BRITISH COLUMBIA

¹ Including Family Justice Innovation Lab, Law Society of BC, Legal Aid BC, CBABC, CLEBC, People's Law School, and Rise Women's Legal Centre.

Executive Summary - Phase 1

The Legal Aid BC / Law Foundation of BC Research Fund aims to financially support research on, and evaluation of, legal aid and other access to justice programs.

The Family Law Unbundled Legal Services Research Project (ULSRP) is an initiative designed to both evaluate the effectiveness of family unbundled legal services and to facilitate access to justice by enhancing the working relationships between the existing community of ULS providers and BC citizens most in need of unbundled-type services.

Essential to the effectiveness of legal service delivery is the client experience. Experience is multi-dimensional and makes it difficult to capture standardized data, but it serves as an important beacon to evaluate and guide improvements to legal services and regulatory policy in the province. This initiative designs tools that will support evaluation on an ongoing basis, rather than using a snap-shot approach.

Phase 1 of the ULSRP established a model of the client experience built with the inputs of a team of practicing ULS legal professionals (LPs). Client survey questions were developed, and a tool created to facilitate collecting data from clients on their ULS experience. A reporting system and data portal were also developed to store, analyze and present the incoming client experience data, along with complementary data provided by the LPs on the details of those same legal service events the clients were surveyed on. The client experience, along with the legal professional's input, together have brought a voice to the "heartbeat" of ULS services in BC.

Phase 1 of the ULSRP achieved its primary objectives, which were to validate support of the evaluation survey tools and questions with real ULS clients, and the willingness of LPs to participate in getting the survey into the hands of their clients.

Here are two of the anonymous comments received from clients who provided feedback on their service:

"This service is essential. We need more of this service and other self service functions. The legal process needs to be simplified so regular people can access it."

"My unbundled service allowed me to allocate the funds that would have been consumed by legal fees to keep my home. It also helped build my trust in the judicial system. It helped shape my own confidence in managing my legal matters in such a way as to not overuse the courts and stay in a course to settlement."

And, two comments from legal professionals who participated in the project:

"If legal coaching/unbundling is to be seen as a viable practice model, then work needs to be done to remove some of the uncertainty and unknowns."

The ULS project is doing just that; it is collecting and measuring data in five key areas where information has only been anecdotal thus far. This type of measurable data will be critical for any lawyer interested in pursuing a legal coaching/ unbundled practice model. It will guide lawyers on what is possible and where they can dedicate their time and effort to ensure success."

Laurel Dietz, Lawyer – Alinea Legal Coaching

"The client feedback tool is a great resource for unbundled practitioners who strive to be more client centered as it enables them to respond to client needs and adjust their services accordingly."

Marcus M. Sixta, Lawyer & Founder – Crossroads Law, Coach My Case

The project delivered high-value items, including:

1. Formation of an advisory team
2. Development of a model to measure client experience
3. Development of a measurable model of a typical unbundled legal service event
4. Processes and methodology to capture ongoing data on the client experience and service event
5. Development of digital online tools to efficiently capture data from clients and legal professionals
6. Development of an online data portal to store, analyze and graphically present project data to a broad audience
7. Successful launch of the project prototype with an initial team of legal professionals and their clients
8. Healthy engagement of both professionals and clients with the tools
9. Public communication with and enthusiastic support of the ULSRP by the community of ULS professionals and other stakeholders
10. Implementation of a ULS Roster newsletter to better engage with Roster members about the project
11. Phase 1 report documenting the results to date

Phase 1 also captured and applied many important lessons learned, which are detailed in the body of this report.

Phase 2 of the ULSRP proposes to take the working model to evaluate client experience, including the processes and technology developed to capture data on that experience, and to scale the system out to the broader ULS Roster members and beyond. (see Phase 2 Funding Request for more details).

In addition to the core client experience deliverables, Phase 2 will significantly reduce the administrative work currently required to administer the Roster, by adding automated Roster onboarding and self-managed profile changes.

Research Fund Q&A

The following questions were asked by the Research Fund as part of the initial funding request. We are providing detailed answers for each question below.

- What was the purpose of Phase 1?

The purpose of the overall project is to develop, apply and evaluate a practical method and tool for the real-time ongoing collection of client feedback and associated data related to family law unbundling services in BC. This data will be used to evaluate the effectiveness of unbundled family legal services and to inform service providers, innovators and policy-makers about the user/client experience and how this experience can be improved in the family area and beyond.

There is now widespread agreement that a "[user-centred](#)" (or client/human-centred) approach is key to improving access to justice in the BC justice system. In a client/user-centred system, feedback

from clients about their experience is essential. However, despite profession-wide guidance to do so, 37% of firms don't collect any client feedback at all, and 42% only collect it casually².

"Unbundling" was a word used by Forrest Mosten³ in the US to describe an approach to providing legal services which was different from the traditional full representation model. The purpose was primarily to increase access to justice in the face of a widening affordability gap. In unbundling, the lawyer and client work collaboratively to divide between them the list of tasks required to address the legal problem. Based on the client's budget and needs, tasks are strategically allocated to make the most of the lawyer's expertise. Unbundling can involve non-hourly based pricing strategies including flat fees and subscription models. It also includes "legal coaching" in which the role of the lawyer is a "behind the scenes" coaching role to support the client's management of the matter.

Unbundling is intended to be a more affordable way to support client empowerment. It is definitely client-centred. It is also intended to provide a variety of benefits to the legal professionals including increased well-being and a new source of client referrals.

These intentions are laudable. But are they proving to be true in practice? At the time this project was initiated there was very little BC-based empirical data about how unbundling is working from the perspective of the client or the legal professionals providing the services.⁴ We are grateful for the inspiration and feedback received from ULS practitioners and researchers in other jurisdictions including Alberta, Ontario, Saskatchewan and the U.S.

The unbundled legal services tool developed and implemented in Phase 1 is intended to evaluate by capturing ongoing feedback from clients and legal professionals, beginning with family law services. It also captures lessons and approaches which can be applied to improve service delivery and client outcomes. The intent of Phase 2 is to expand the approach beyond unbundling to "traditional" legal service models and to legal professionals in other practice areas.

This approach is consistent with proven practices in other industries. Clients today:

- Expect great and convenient service
- Expect business to focus on clients first
- Demand a client-centred approach⁵

A client-centred approach means focusing on what is important to the client, from the client's perspective. Legal professionals tend to make assumptions about client goals and priorities which are often wrong.⁶ Client feedback is used to continuously measure feedback to allow course corrections and fine-tuning of service delivery. The BC legal industry lags behind in this approach. While the Law Society of BC collects and investigates client "complaints" (negative feedback), they are often extreme cases and reported too late in the day to allow real-time improvement. We need access to both negative and positive experiences (bright spots) to better understand client experience across the spectrum and, in this case, to evaluate the effectiveness of ULS.

This initiative aims to make BC a legal industry/sector leader in this area.

² "There's lots of room for improvement in the legal industry overall: In fact, most firms aren't even collecting feedback from their clients to help improve their businesses. 42% of firms surveyed only collected feedback casually, and 37% said they didn't collect feedback at all."

<https://www.clio.com/blog/nps-law-firms/> See also: Heather Gray-Grant "Listening to the Client"
<https://www.slaw.ca/2021/10/14/listening-to-the-client/>

³ Forrest Mosten, the "father of unbundling":

https://iaals.du.edu/sites/default/files/documents/publications/forrest_s_mosten.unbundled_legal_services_past_present_and_future.pdf

⁴ Mediate BC Society's 2017 report reported on legal professional perspectives; [Alberta's CRILF Study](#) (John-Paul Boyd QC). Studies are ongoing in both Ontario (Rachel Birnbaum, Nick Bala, Tami Moscoe and Noel Semple) and Saskatchewan (Brea Lowenberger).

⁵ Marcus Sixta, "Legal Coaching: How to give the client the wheel without the wheels coming off", presentation for CLEBC Program "Unbundled Legal Services and Limited Retainers 2021", November 3, 2021. Marcus uses Uber, Netflix and Spotify as examples of companies leading the way in client-centred approaches.

⁶ <https://adamsmithesq.com/2021/01/strategic-client-management-law-really-is-a-client-service-business-so-what-are-the-implications/>

- What were the specific objectives of Phase 1?

Phase 1 was a “demonstration project” to test the proposed tools and approach as well as underlying assumptions about the effectiveness of ULS. At a high level, the data collected through this approach was intended to address the following key questions:

- What is the user/client experience of family law unbundling services?
- What is the experience of the legal professionals providing the service?
- Do unbundling services improve the user experience of access to justice and in what way?
- What changes can be made to family law unbundling services to improve the user experience and make it a sustainable and fulfilling practice for legal professionals?

Phase 1 also aimed to further develop and apply a common taxonomy to apply to feedback from clients and legal professionals, building on the metrics work being done by BC PLEI and linking it to the A2JBC Triple Aim Measurement Framework.⁷

In addition to the questions above, Phase 1 outlined three objectives the team felt should be achieved to justify the viability of Phase 2 and its request for funding. They were:

1. Clients support the platform questions and process used in Phase 1
2. Lawyers support the platform and process used in Phase 1
3. There are organizations who are candidates to take responsibility for the ongoing administration of the Roster into Phase 2 and beyond.

#1 and #2 were achieved, measured by the quantitative engagement levels and qualitative feedback received from each group. There are candidate organizations identified to manage the Roster going forward, but no firm commitments have been arranged yet.

3. Were the objectives modified? If so, how?

These objectives were not modified during Phase 1, however objective 3 was corrected from inaccurately stating “sustainable operation of the platform post-Phase 2” to “administration of the Roster.”

4. What were the outcomes of Phase 1? Include statistics as appropriate.

Phase 1 generated the tools and framework, and some early data to demonstrate the functionality of the system. To date, 32 clients have responded to the client survey providing very useful information for the project team. Details are as follows:

List of Phase 1 accomplishments:

- i) Project manager recruited (Matt Sims – Standpoint Decisions Inc.)
- ii) Advisory Group⁸ formed and consulted (first meeting January 12, 2021)
- iii) Designed and implemented prototypes of digital platform, dashboard, collection method and easy-to-use data entry tool
- iv) With input from Advisory Group, developed a taxonomy and success indicators including detailed dimensions for:

- (1) Client experience:
 - (a) Discoverability

⁷ Described on the project website: <https://sites.google.com/standpointdecisions.com/uls-bc/systems-thinking>

⁸ Jeannette Aucoin, Hannah DeJong, Laurel Dietz; Sara Domijan; Kim Hawkins, Lynda Hydama (unbundling client); Zahra Jenab, Zahra Jimale, Jane Morley; Michele Ross; Sonali Sharma, Marcus Sixta; Jodie Stark; Vivienne Stewart (Stepped off Nov 2021).

- (b) Agency
 - (c) Affordability
 - (d) Convenience
 - (e) Progress
- (2) Legal service event:
- (a) Referral Source
 - (b) Channel
 - (c) Area of Law
 - (d) Language
 - (e) Service Type
- (3) Legal Professional (Roster) experience survey:
- (a) Profitability
 - (b) Referability
 - (c) Access to Justice
 - (d) Well-being

Data on the client experience is collected from the client via an online tool, data on the legal service event is provided by the legal professional, and data on the legal professional experience is collected via an occasional Roster survey.

Figure 1 below is from the project data reporting website (Nov 4 2021), and shows the current standing across the 5 client dimensions:

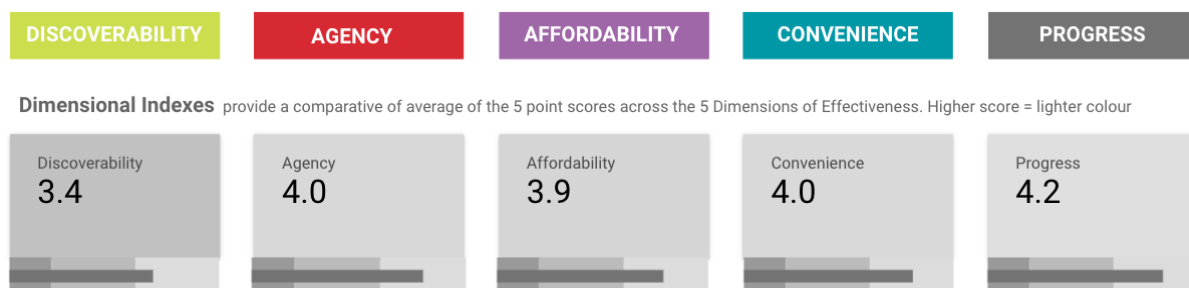


Figure 1: Client experience dimension indexes and current standings

Figure 2 below shows the data collected from service providers on each service event they recorded:

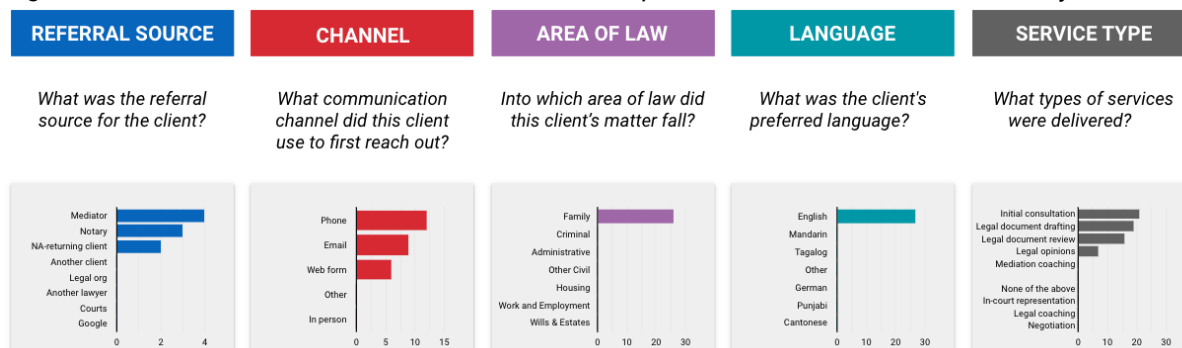


Figure 2: Dimensions and recorded data of the service events

- v) With input from the Advisory Group, created the client survey tool with 5 questions. The survey is designed to be anonymous in order to encourage candid feedback, and is accessible from any connected device. It feeds into an aggregated dashboard available for public viewing. Recently, Standpoint has offered to team members a unique link which provides them (in future) with

access to an individualized dashboard so they can compare their results to the overall database.

- vi) The live dashboards containing the charts above can be found at the following URLs:
[USLBC Client experience & service event dashboard](#)
[ULSBC Roster demographics and survey dashboard](#)
- vii) Recruited a team of experienced unbundling practitioners.⁹
- viii) Provided training and guidance on using the client survey tool and dashboard
- ix) Collected and monitored data throughout and watched for opportunities to make improvements. For example, based on the data and team feedback we tweaked the wording of the “profitability” question in the lawyer questionnaire.
- x) Collected feedback from clients and lawyers about the usefulness of the tool
- xi) Communicated with the profession through a Slaw post January 12, 2021 [“Measuring the Effectiveness of Unbundling: A Novel Approach”](#).
- xii) Launched the client survey and lawyer demographics survey on February 19, 2021.
- xiii) Implemented a ULS Roster newsletter to engage with Roster members and keep them informed about the initiative’s progress
- xiv) Connected with ULS projects in other jurisdictions (Saskatchewan, Alberta, Ontario and the U.S.). In particular, had a very helpful discussion with Professor Noel Semple about his article [Measuring Legal Service Value](#).
- xv) Communicated about the initiative through the [Lab website](#) and social media (Twitter).
- xvi) Connected with the CBABC Unbundled Legal Services section executive, Legal Aid BC and the Law Society of BC. People’s Law School highlighted the client survey in its newsletter in May 2021.
- xvii) Project manager participated in the CLEBC Unbundling Webinar Nov 3, 2021, and presented a session titled “How to become a more data-driven ULS practice” using this project as the working example. [Link to session slides](#).

Summary of Data

We invite readers to explore the [ULSBC.Avvv.Pro](#) website which displays the data collected to date in a simple dashboard format. This open and accessible data presentation format is critical to making the voice of the client accessible to anyone, in a confidential and secure fashion.

32 clients have responded to date to the survey. Ratings on each dimension as of November 4, 2021 are shown in Figure 1 above.

Clients were also invited to provide narrative comments on the unbundled services they received. 24 clients provided anonymous comments, which can be viewed on the [client experience dashboard](#) or in the appendix to this document. They are overwhelmingly positive, and also act as a source of validation and encouragement for future potential unbundled clients.

⁹ Jeannette Aucoin, Hannah DeJong, Laurel Dietz; Sara Domijan; Zahra Jenab; Michele Ross; Sonali Sharma, Marcus Sixta; Vivienne Stewart (Stepped off Nov 2021). Additional team members added fall 2021: Heather Dale, Kiarash Izadifar; Scott Taylor; Donald C. MacDougall. Formed separate group for ongoing consultation: Kim Hawkins, Lynda Hydamaka (unbundling client); Zahra Jimale; Jane Morley; Jodie Stark.

Approximately 25 responses to the service demographics survey were submitted to date by legal professionals and provide valuable data about the clients, type of matter and services provided.

Qualitative data from legal professionals

As part of the preparation for this report, the project team reached out to the Advisory Group and Team practitioners seeking their views on the value of this project. These are the three responses received so far:

"I have been developing my legal coaching/unbundled services for five years now. Only recently, have I been able to dedicate my practice fully to these services and even still I have not been able to achieve the volume of clients necessary to feel secure about the continued success of my business.

I have learned that the impact one lawyer providing legal coaching/ unbundled services can have in the legal market is much larger than I had anticipated. I believe one lawyer with adequate supports, could serve hundreds of clients a year, while still maintaining a reasonable work/life balance (ie a 9-4 M-F schedule).

The problem with actually achieving this however, is that the practice model remains untested and there are many unknowns. If legal coaching/unbundling is to be seen as a viable practice model, then work needs to be done to remove some of the uncertainty and unknowns.

The ULS project is doing just that; it is collecting and measuring data in five key areas where information has only been anecdotal thus far. This type of measurable data will be critical for any lawyer interested in pursuing a legal coaching/ unbundled practice model. It will guide lawyers on what is possible and where they can dedicate their time and effort to ensure success.

The more lawyers who provide these services in a deliberate, intentional manner and market these services, the more clients will begin to seek these services out. Giving lawyers the data they need to decide to offer legal coaching/ unbundled legal services is a significant step towards combatting the access to justice crisis in BC."

Laurel Dietz, Alinea Legal Coaching

"Here is my response to the value of this project and why it should continue: As the search for innovative ways to deliver legal services increases, in order to better serve the public and improve access to justice, it is critical that these innovations are evaluated on an ongoing basis to ensure they meet the intended objectives. The evaluation process also has the added benefit of identifying ways to improve the innovations. This project helps us better understand if the great potential of unbundled legal services are being realized and ways to ensure the objectives of unbundled legal services are met. What is unique about this project is the approach, services (third party) and tools that are being used to conduct the evaluation. This project serves as an example of the importance of evaluation and how to best conduct evaluations and should continue to conclusion."

Zahra Jimale, Jimale Law Corporation

"The client feedback tool is a great resource for unbundled practitioners who strive to be more client centered as it enables them to respond to client needs and adjust their services accordingly."

Marcus M. Sixta, Founder, Crossroads Law, Coach My Case

5. Will the materials produced be useful to other audiences?

Yes. The platform, tools and materials are all designed with a view to future expansion. First, to other family unbundling practitioners; second to unbundling practitioners in other areas of the law; and third (with some modifications) to practitioners who use business models and approaches which do not fall within the definition of unbundling/legal coaching.

The approaches used in this initiative are of general applicability and represent a significant opportunity to build innovative client-centred approaches into all forms of legal practice.

6. Was Phase 1 successful in terms of its purpose and objectives?

Yes. This was a demonstration project. In our view, the initiative resulted in a sufficient number of helpful responses and meaningful comments to warrant continuing the initiative through Phase 2. The level of practitioner interest in this approach is significant. All 13 team members were encouraged to invite unbundling clients to complete the simple survey about their experience. We did not collect data about how many invitations were made but, to date, 33 clients have responded and contributed helpful comments. We submit that it is enough to demonstrate the potential for expansion in Phase 2.

It is still too early to comment on the overall project objectives. However, the data provided to date indicate that Phase 2 could generate significant and meaningful data relevant to whether ULS services are improving access to justice for clients and supporting a sustainable and fulfilling practice for legal professionals.

7. How was the success of Phase 1 measured?

The taxonomy, dimensions, and metrics used for this initiative are described above, and were measured by their utility to accomplish the objectives of Phase 1. In that they were successful. Quantitative measures include participation rates, client ratings and practitioner ratings. Qualitative measures include narrative comments from clients and feedback from practitioners.

8. What are the key factors that contributed to the success of Phase 1?

Key factors include:

- A client-centred approach focusing on access to justice
- The willingness and enthusiasm of clients to share their experience
- Funding from the Committee to allow the engagement of Standpoint which has contributed extraordinary vision, expertise and commitment
- A collaborative approach
- An enthusiastic Advisory Group and practitioner team
- Participation of both practitioners and clients in the design and implementation
- Building on proven approaches in other industries
- Taking an iterative approach to identify and apply lessons learned along the way
- Paying close attention to both client needs and to the needs of the practitioners
- Transparency in data reporting
- Creative use of technology

9. What challenges did you encounter in implementing the project?

- The major (and expected) challenge was engagement, by both practitioners and clients. People are busy, and surveys typically receive very low response rates. Efforts were made to ensure the ask of both groups was as easy and painless as possible. We believe those efforts were successful, as our engagement rates were higher than expected.
- We knew from the outset that client engagement would be challenging. However, the project team of practitioners committed to inviting their own clients to respond to the survey. We believe this generated more responses than if we had tried to connect with clients directly
- Process integration. Practitioners need support in finding the most efficient ways to integrate soliciting formal client feedback into their day-to-day business processes, in such a manner

that collection becomes as automated as possible, and continuous. While a real challenge, there are definitely solutions available to achieve this using the tool's functionality.

- Identifying ways to support practitioners to make the survey invitation part of their regular business process. We learned much from the team and implemented various strategies/incentives with good results

10. What could have made Phase 1 more effective?

Phase 1 could have been more effective if we had more resources to provide practitioners with their own practice data separate from the aggregate from the outset. We believe that this functionality will be the incentive for their longer-term participation by giving them vital practice level data on their own clients' experience.

11. What, if any, are the follow-up plans for Phase 1?

We are applying for funding for Phase 2. See the detailed proposal attached.

12. What did Phase 1 accomplish?

In addition to the outcomes and success factors noted above, we wish to outline some additional key learning points produced by this initiative so far.

a) Interest from legal professionals

As stated in the introduction, very few legal professionals seek client experience feedback as a regular part of their business in an effort to evaluate the effectiveness of ULS and other forms of legal services. This needs to change in order to create a truly client-centred industry. We discovered that legal professionals make certain (untrue) assumptions¹⁰ such as:

- No news (from clients) is good news
- No complaints to the Law Society means I'm doing a great job
- If I seek feedback it will be negative
- Clients are too busy to respond
- Clients don't have anything worthwhile to help me improve my practice

Using a collaborative approach, the project team was able to tackle these assumptions and build confidence that client feedback was essential and helpful (even if it might be negative).

While a client-centred approach means focusing on the needs, hopes and expectations of the client, the needs and goals of the practitioner must also be recognized. Only if they have client feedback will they be able to know what parts of their practice and business model needs to be improved. An improved model will ultimately result in more clients, more referrals and higher returns.

The team members were open to this potential and embraced the challenge. The results that came in are beginning to reveal some important patterns, particularly around the need for greater awareness of, and discoverability of, unbundling. Already there are discussions about how the practitioners can work together to raise awareness and improve discoverability. The client comments are uniformly thoughtful and useful. And, contrary to one of the assumptions above, they are overwhelmingly positive.

The project received positive feedback from Jordan Furlong on Twitter in March 2021:

https://twitter.com/jordan_law21/

¹⁰ [This article](#) uses a "tongue in cheek" title to counter four common myths (assumptions) about client feedback.

We expect that, over time, more legal professionals will want to incorporate these approaches into their practices. The project team members confirm that the purpose and objectives of this initiative are important to them and that it needs to continue.

- Responses from clients:

Not every invitation will result in a completed survey. Clients are busy and likely stressed by their interaction with the justice system. However, the quality of the responses obtained in Phase 1 shows us that many are willing to take a few minutes to communicate their experiences in thoughtful and helpful ways.

There is more that we can do to make the process as easy and streamlined as possible for both the legal professionals and clients.

- Designing the approach:

It is important to embed the tools into the legal professional's practice model. The more automated it is, the more likely the client will be invited and encouraged to respond.

The tools must be simple to use and accessible.

It is best to go where the clients are – their devices.

Legal professionals are willing to give this a try if they see that there are benefits to them as well as to their clients. We have learned that incentives are key to success with busy professionals, so we are proposing to add functionality into Phase 2 such as profile-editing, easier onboarding, dashboard reporting, and process integration assistance.

- Better understanding of the effectiveness of unbundled services in general:

We do not have enough data yet to draw firm conclusions. However, there are some interesting themes and signals about ULS and the receptivity of the current environment, including:

- There continues to be a general lack of public awareness of ULS. Clients report not knowing about ULS before experiencing these services. If clients don't know what to look for, how will they find it?
- The profession in general is not aware of ULS or how it might apply to their practice or area of law.¹¹
- Unbundled services are difficult for clients to find. The "discoverability" dimension was consistently rated lower than the other four dimensions. Client comments confirmed how challenging it was to find a lawyer who provided ULS.
- Clients who do receive ULS provide consistently high marks for the remainder of the dimensions (agency, affordability, and convenience). ULS are valued by clients.
- ULS practitioners receive referrals from a variety of sources including mediators and notaries. Many referrals are from former clients.
- We still have much to learn about how the project's approach links with the Triple Aim and the Measurement Working Group's work. However, there are already positive correlations.¹² This will be a focus for Phase 2.
- Practitioners and clients appreciate a central place for information about unbundling including the Roster. And there are many opportunities to streamline, automate and

¹¹ One of the presenters at the CLEBC Unbundling Webinar on November 3, 2021 who provides civil legal services, acknowledged that until recently she did not realize that the services she was providing were called ULS / legal coaching / unbundling.

¹² <https://sites.google.com/standpointdecisions.com/uls-bc/systems-thinking>

improve the Roster experience. Phase 1 work has highlighted a need to strengthen the way in which the BC Family Unbundling Roster serves both clients and legal professionals. We are exploring ways to improve the daunting spreadsheet (of over 180 legal professionals) by adding a needs-based search tool that helps them to find an unbundling practitioner to meet their needs more quickly and efficiently. We are also looking at ways to automate roster maintenance to make it easier for lawyers to join the roster and to update their own data. We were able to take some steps towards this goal as a part of Phase 1. However, much more can be done within Phase 2.

Closing

We are enormously grateful to the Fund for its support for Phase 1. We hope that we will have the opportunity to continue this important work in Phase 2.

Appendix

Table of comments provided by clients on their experience with unbundled legal service:

Comment	Date
<i>The lawyer who handled my case on a unbundled service was amazing and went beyond my expectation to steer me in the right direction. Her confidence in me gave me strength and I was able to do so very much on my own, based on her directions.</i>	2021-02-26
<i>Very happy with the cost and services I received</i>	2021-03-04
<i>Very appreciative of all your help!</i>	2021-03-05
<i>The service was Excellent and I would recommend it to anybody going through the situation that I went through absolutely fantastic can't say enough about it</i>	2021-03-05
<i>I have used unbundled service with two firms. With the first firm the lawyer that was providing me with the service left the firm. I had a hard time finding the second lawyer. She is doing a very good job helping me with my complicated case. I don't begrudge what I am being charged at all. I wish that all lawyers were like her.</i>	2021-03-06
<i>The unbundled service I received helped me to positively problem solve in and informed and confident way. I am so grateful for the support I received</i>	2021-03-06
<i>It was quite straightforward, yet very helpful. Glad I sought it.</i>	2021-03-06
<i>This service is essential. We need more of this service and other self service functions. The legal process needs to be simplified so regular people can access it.</i>	2021-03-06
<i>I feel heard, and valued as a client. I felt she really understood my matter and gave me more than value for the \$\$.</i> Highly recommended.	2021-03-06
<i>I would guess that most people want to use unbundled services to help represent themselves. There is very little information on how to fill out the forms and it is not overly clear that you need to purchase Microsoft office and Adobe to use the forms as they will not work on the competitions software.</i>	2021-03-08
<i>Service was good albeit a little slow.</i>	2021-03-10
<i>My unbundled service allowed me to allocate the funds that would have been consumed by legal fees to keep my home. It also helped build my trust in the judicial system. It helped shape my own confidence in managing my legal matters in such a way as to not overuse the courts and stay in a course to settlement.</i>	
<i>Many lawyers say they are collaborative when really they are not.</i>	2021-03-30
<i>I really appreciated knowing I had a lawyer's time to dedicate to the matter, and could choose/check in about the level of engagement with them.</i>	2021-04-08
<i>Frustrating because it seems to be an ongoing problem of not receiving full information to feel confident that the problem is actually resolved.</i>	2021-05-26
<i>appreciate the assistance provided as the starting process can be done personally but it's nice to have the review/audit by a professional to finalize and process properly</i>	2021-05-31
<i>It made it affordable to have a solid sounding board</i>	2021-06-07
<i>[Lawyer] was absolutely fabulous, helpful and professional and delivered outstanding service to me.</i>	2021-07-22
<i>I greatly appreciated the ability to tailor the service according to my personal legal needs and situation. I also liked the simplicity and clarity regarding billing.</i>	2021-08-28
<i>It helped immensely in giving me the guidance I needed. Was affordable, fair and accessible.</i>	2021-09-02
<i>Took a lot of the anxiety, over emotion and stress out of the process.</i>	2021-09-02
<i>Wow. I cannot thanks [Lawyer] enough for his knowledge and approach for my seemingly urgent matter. In a 30 minute consult, he managed to help delay an urgent full day hearing, and provided excellent suggestions. Thank you!</i>	2021-10-19
<i>Very helpful when you want to save time and money to have access to a lawyer that can assist.</i>	2021-10-21
<i>It's been great, its still unnerving to deal with lawyers on my own but letter writing is getting easier. Filing other types of things still makes me uneasy; and not very confident doing it on my own.</i>	2021-10-24
<i>My service provided is still in the beginning stages of my case so it was difficult to fill out the survey at this time.</i>	2021-11-01

Figure 3 - client experience comments