



## Legal Choices Ideation Workshop notes

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alterline



In partnership with:

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## Contents

1.0	The ideas.....	4	6.3	Legal process maps .....	26
2.0	Building empathy.....	5	6.4	Find a legal professional.....	27
2.1	Will-writing and probate .....	5	6.5	Timeline of legal processes .....	28
2.2	Conveyancing.....	7	6.6	Legal costs: what you need to know .....	28
2.3	Housing - Evictions.....	8	6.7	Reasonable adjustment tool .....	29
2.4	Asylum claims .....	10	6.8	Legal problem pop-up .....	29
2.5	Family law – divorce / separation.....	11	6.9	Chatbot.....	30
2.6	SMEs .....	13	6.10	Rate your lawyer .....	30
3.0	Sharing inspiration.....	15	6.11	Non-legal solutions .....	31
4.0	How can I...?.....	17	6.12	Jargon buster! .....	31
5.0	Ideation.....	18	6.13	Resources for advice givers.....	32
6.0	Fleshing out the ideas.....	25	6.14	Affordability calculator.....	32
6.1	Complainorater.....	25	6.15	Triage tool .....	33
6.2	Legal starting point portal .....	25	6.16	Online resources .....	33
			6.17	Wills comparison tool .....	34



6.18	The 'swoosh' area.....	35
6.19	Legal problem pop-up (2) .....	35
6.20	Video decision tree.....	36
7.0	Outside the scope of the workshop .....	37
7.1	The 'quick win space' .....	37
7.2	The 'nice to know more space' .....	37



## 1.0 The ideas

The Legal Choices ideation workshop took place over two days (Wednesday 13th and Thursday 14th June 2018). The workshop took a design thinking approach to generate a large number of ideas for digital solutions for the Legal Choices website which could educate and empower users, whilst substantially increasing the number of unique visitors to the site over the next three years.

Participants were guided through a range of group activities to encourage them to empathise with the users of key legal areas; generate a list of key user needs; share examples of solutions to these needs which already exist within and outside the legal world; and generate ideas to be taken into the research, prototyping, development and testing stages. The key legal areas covered were:

- Will-writing and probate
- Conveyancing
- Housing – evictions
- Asylum claims
- Family – divorce / separation
- Legal needs of small and medium enterprises (SMEs).

The twenty ideas which were fleshed out at the end of the two-day session were (see section 6 for a description of the ideas):

1. Complainorater
2. Legal starting point portal
3. Legal process maps
4. Find a legal professional

5. Timeline of legal processes
6. Legal costs: what you need to know
7. Reasonable adjustment tool
8. Legal problem pop-up
9. Chatbot
10. Rate your lawyer
11. Non-legal solutions
12. Jargon buster!
13. Resources for advice givers
14. Affordability calculator
15. Triage tool
16. Online resources
17. Wills comparison tool
18. The 'swoosh' area
19. Legal problem pop-up (2)
20. Video decision tree.

The immediate task following the workshop will be to produce a SWOT analysis of ten unique ideas and ten variations on these unique ideas. We will begin this process by identifying the criteria the ideas should be judged against, then build a matrix which shows the strengths, weaknesses, opportunities and threats associated with each idea. Finally, a recommendation will be provided for the ten ideas to be taken forward into the research phase.

The remainder of this report documents the discussions which took place on the day.

## 2.0 Building empathy

After presenting the results of the desk research and discussing the key themes, workshop attendees were split into groups and asked to answer some questions about each legal area / audience. Each group had the chance to input into the following questions for each legal area:

- What are the key legal issues I might face?
- What options are available to me?
- What am I thinking and feeling during this process?
- What typically would make this a smooth process?
- What are the key challenges people might face?

Following this, participants were asked to reflect on the takeaways from the task and turn these into a series of 'How might we...' questions to start thinking about how we might try to solve some of the challenges faced across these legal audiences.

### 2.1 Will-writing and probate

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#### What are the key legal issues I might face?

- Is it going to pass a legal challenge / court?
- No will! What do I do?
- What does an executor do and how should I appoint them?
- Get your will registered?
- Firm has gone under and they wrote the will
- When choosing an executor, tell them expectations, communication

- Power of attorney capacity
- Estate administration and probate
- Beneficiaries
- Digital assets
- Twitter
- Facebook

#### What options are available to me?

- Unregulated providers
- DIY route
- Regulated provider
- No win, no fee for challenging a will
- Applying for probate – authorised person
- Regulated provider – redress
- Language of wills and probate

#### What am I thinking and feeling during this process?

- Nervous
- Bereaved
- Overwhelmed
- Don't know where to start
- Confronted with red tape e.g. banks
- May be dying and need a will – all associated issues
- Guilt over content of the will (during making it or challenging it)
- New will following death – bereavement
- Burying your head in the sand
- Vulnerable
- Forced mediator



- Cheated
- Frustrated
- Under pressure – financial
- Feeling under duress
- Financial abuse

### What typically would make this a smooth process?

- Writing a will
- Making sure / knowing how it's valid
- Clarity of process e.g. probate – what do I need to know / what's going to happen?
- Plain English
- Understanding what probate is – understanding terminology
- Being able to make an informed choice

### What are the key challenges people might face?

- Knowing where to start
- Accessing information
- Probate registry
- Where to get information from (right person)
- Understanding the benefits / risks of drafting own will vs. solicitor drafting it
- Remember to update it
- Remembering where it is, storage
- Part of other process e.g. divorce
- Unregulated providers – no redress

### How might we...

- ... convince people that they need to write a will?
- ... advise people of their options (regulated vs. unregulated)?
- ... inform and educate people (e.g. terminology)?
- ... Overcome barriers (legal speak, perceptions etc.)?
- ... Ensure people end up with a legally sound will?
- ... Make their costs more transparent?
- ... Make the process transparent?
- ... Manage expectations?
- ... Make the process accessible (EDI issues)?
- ... Help people know where to start?
- ... Advise on the emotional side (soft skills)?
- ... Help people to understand their rights to redress?
- ... Help people to understand how to complain?
- ... Help people to deal with capacity / POA issues?

... Help people to prioritise writing a will (an every-day purchase – not a distress one)?

... Help people to compare providers?

## 2.2 Conveyancing

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### What are the key legal issues I might face?

- Who do I use – solicitor or conveyancer – and what are the advantages and disadvantages of using one over the other?
- Contractual
- Disputes – disclosure of what you are buying/rights of way/access
- Knowing what elements have to be paid
- Knowing what the process is / length of time for the process
- Guarantee / shared ownership / buy to let
- Mortgage lender (panel)
- Leasehold – extension of lease
- Management companies – leasehold, freehold

### What options are available to me?

- Comparison websites?
- Going solo?
- Consumer websites?
- Apps?
- Which?
- Online providers – do I have to go anywhere?
- Going via someone?
- Recommendations / referrals

- Estate agents
- Banks

### What am I thinking and feeling during this process?

- Stressed!
- Frustrated
- Uninformed
- Confused – stack of papers coming through!
- Uncertain
- In the dark – what do terms mean?
- Positive
- Price / money involved

### What typically would make this a smooth process?

- Clarity
- High standards
- Timeline
- Regular correspondence
- Use of plain English
- Quick and cheap
- Reputable solicitor
- Knowing where to go for guidance
- One contract
- Digitisation
- Land Registry changes – digital signatures
- Better information for first time buyers
- Better information for leaseholds

### What are the key challenges people might face?

- Friday afternoon fraud
- Trust in person working on your file
- Can I do this myself?
- What is conveyancing? What does it entail?
- Professional negligence claim – what does it entail?
- Relationship between estate agents and shopping around
- Leasehold issues
- Boundary issues
- Timeline – how long does it take?
- Minimising risk of fraud
- FTBs

### How might we...

- ... Make it easier for people to select a conveyancing lawyer?
- ... Help people through the conveyancing process?
- ... Help people compare costs?
- ... Understand what they might get from their lawyer?
- ... Help people know what questions to ask their lawyer when selecting and during the process?
- ... Help people understand the cost elements in a conveyancing process?

... Help people understand what to do if something goes wrong / complain / rights of redress?

... Help people understand the legal language?

... Help people rate their conveyancing lawyer?

... Help people manage their feelings during the process?

... Help people to prepare to see / brief their lawyer?

### 2.3 Housing - Evictions

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#### What are the key legal issues I might face?

- Lack of knowledge
- Knowing your rights
- Where to start / turn to
- Public vs. private landlord
- Timescales (when to seek help)
- Process
- What is eviction?
- Problems that have resulted in eviction e.g. debt / alcohol / substance abuse
- Anti-social behaviour
- Childcare issues
- Schooling
- Separation from neighbourhood
- Benefits information – process / appeal
- Forced eviction – court proceeding





- Contractual issues – end of lease
- Landlords need advice options – genuine removal, issues with tenants

### What options are available to me?

- Who can help?
- No money = no help?
- Citizens Advice – other support organisations
- Talk to a friend
- Search online
- Family / friends
- Go it alone
- Legal advice – range lawyers
- Legal help / legal aid
- Advice Centres (local)
- Law Works

### What am I thinking and feeling during this process?

- Panic!
- Anxious
- Low
- Facing a brick wall
- How do I raise deposit / will I get deposit back?
- Where do I go / options open to me?
- How will eviction affect rights / ability to rent?
- How will I pay?
- Landlord – must sell, need money, so how do I evict?
- How can I keep my family together?

- I've been burying my head in the sand?
- I might have health issues...

### What typically would make this a smooth process?

- Long notice period / process / advice from an independent body
- Knowing your rights
- Emotional support
- Good explanation of process
- Joined up approach between sectors and organisations
- Knowing who does what
- Knowing what you're entitled to
- More clarity around legal aid / eligibility

### What are the key challenges people might face?

- Ignorance
- Challenge in getting trusted information
- Contracts – understand the detail
- Affordability

### How might we...

... Not duplicate information? Specialist organisations already exist – work with them?

... Keep information up to date?

... Make people aware of their rights?

... Raise awareness of legal help / legal aid routes available?

... Make sure information is getting to the right place – promote it in the right way?

... Show the process and help people anticipate what might happen? (the format needs to work with people)

## 2.4 Asylum claims

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### What are the legal issues I might face?

- Residence
- Rights for family
- Financial support
- Health care
- Human rights
- What is the process to be able to remain?
- Deportation
- Professional asylum seekers – how do I find work / bank account?
- Ability to work in general

### What options are available to me?

- Asylum / immigration advice must be regulated
- Solicitors
- Chartered legal executive / CILEX practitioner
- OISC practitioners
- Barristers
- Get manoeuvred into seeing an unregulated provider

- Third sector organisations
- Home Office
- MPs
- Return to country of origin
- Apply for asylum elsewhere
- Disappear

### What am I thinking and feeling during this process?

- Fear of what they have come from / the future
- Confusion
- Loss
- Doubt
- Possible relief / hope
- Cost?
- Anxiety
- Hopeful
- Positive
- Relieved
- Brave
- Confident
- Isolated
- Angry
- Excluded

### What would typically make this a smooth process?

- Finding right advice / advisor
- Explanation of process
- Information in the right language

- Explanation of possible outcomes and how to deal / next stage
- Knowing how to complain
- Access to clear information
- Review process – people who have used solicitors before...?
- Process chart / step-by-step information / information on typical costs
- Language

### What are the key challenges people might face?

- Unregulated providers – vulnerable, no right to redress
- Language
- Culture
- Who to trust
- Fear authority
- Misinformation / misselling of Britain as a place to come
- Affording it

### How might we...

- ... Tell people what their options and costs are (at each stage)?
- ... Tell people who they can go to for help?
- ... Help people feel supported?
- ... Explain the process and timescales?
- ... Speak to people in “their language”?

... Help “others” help asylum seekers?

... Manage expectations?

... Let people know the process is done / next steps?

... Reach those who need help and advice? Do we use third party groups?

... Decide that Legal Choices is the right place / going to be used? Would a leaflet be better – in court offices, cafes, libraries?

## 2.5 Family law – divorce / separation

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### What are the key legal issues I might face?

- Finance (property, maintenance, capital division, assets)
- Pets
- Seeing children / residence of children
- Change wills
- Debt
- Pensions
- House – conveyancing
- Understanding divorce process – how that fits with resolving other issues
- Fault (important legally)
- Possible criminal charges / retraining
- Violence may need injunction – proof of violence, stress of this
- Legal aid if violence / issues that there is no legal aid
- Grounds for divorce
- One half being stubborn – stalling the divorce

- Separating period of two years

### What options are available to me?

- Mediation
- Negotiated settlement with / without legal help
- Court process / court hearings
- Different lawyers e.g. solicitor, chartered legal executive, CILEX practitioner, barrister
- Go it alone
- Unregulated e.g. McKenzie Friends
- Bury your head in the sand

### What am I thinking and feeling during this process?

- Abusive relationship
- Loss for relationship / relationship with children / family of spouse
- Anger – to partner / process / lawyer / other lawyer
- Regret
- Anxiety
- Fear
- Confusion of process
- Doubt
- Elation / relief
- Embarrassment
- Pressure / stress
- I can't afford this
- Confusion = frustration
- Mental health issues e.g. depression (flare up or start)
- Obsessive

- Possessive
- Throw a divorce party

### What typically would make this a smooth process?

- Knowing what to expect from the outside – knowing the key stages
- Cooperation between parties and / or their legal advisors
- Clear idea of costs – how they fit in process(es) and changes can change cost
- Hope / reassurance about the process and life after outcome

### What are the key challenges people might face?

- Affordability
- Explain options
- Explain process

### How might we...

... Set out the process of divorce and separation simply and cover the range of issues (financial, assets, property, pension, rights – family – disputes)?

... Explain rights on both sides

... Establish if you might qualify for legal aid?

... Tell people where they might find support and explain what the legal options are / costs, plus the pros and cons of each?



... Provide “emotional” support / signpost to this (goes beyond the legal – but let’s be human!)?

... Advise people in vulnerable positions to remove themselves (“safeguarding” role for children too – Childline numbers, refuge)?

... Set expectations in terms of help / support and timescales – how long might this take?

... Explain the process and options in an accessible way to reach a wider audience / at a time of stress?

... People to identify that they need legal representation, and when they do, explain where to go and how to find it?

... Provide a support network and blog?

... Use case studies / personas to show people others like me?

... Keep information up to date and relevant?

... Tell people what they actually need to do?

## 2.6 SMEs

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### What are the key legal issues I might face?

- Human resources
- Tax
- GDPR

- Lease
- Supply contracts
- Contracts and enforcement
- Succession planning
- Intellectual property
- Change organisation structure (limited, LLP, etc.)
- Liability
- Insurance policies
- Debt and recovery
- Pensions
- Trademark

### What options are available to me?

- Federation of small businesses
- Banks
- Enterprise incubators
- Local Chambers of Commerce
- Insurance companies
- Citizens Advice
- Accountants
- Peers – other businesses
- Debt recovery advisors
- Go it alone
- Lawyers

### What am I thinking and feeling during this process?

- Frustrated
- Overwhelmed



- Confused
- Frightened
- Threatened
- Intimidated
- Over-worked
- Angry
- Mental health issues
- Concern over livelihood
- Personal reputation

#### **What typically would make this a smooth process?**

- A one-stop shop with help sheets, guidance and case studies
- Knowledges – is it a good idea to continue with legal avenues?
- Reassurance
- Information to manage expectations
- Sense of outlook / prospects
- Clear advice, guidance and on process
- Knowing options e.g. law firms do cater for a range of services!

#### **What are the key challenges people might face?**

- Becoming confident in dealing with challenges
- Understanding the value of taking legal advice early on
- Inequality – having to deal with a larger business
- Opening up other issues, concerned to look at more than one issue

#### **How might we...**

... Cover a range of issues SMEs face (employment, tax, IP etc.) while keeping it simple?

... Change people's mindsets on what a legal problem is / tackle some myths on dealing with legal issues?

... Complement existing sources of information – point people to the information they need?

... Encourage / help people to address emotional problems attached to business issues?



### 3.0 Sharing inspiration

Participants were asked to think about existing examples of solutions to the 'How might we?' challenges produced in the empathy task. Each person was given three minutes to explain their example and a short key takeaway. The following chapter lists the inspiration examples and their key takeaways.

#### **TripAdvisor**

Legal nectar, reward advice, ranking. Rate both ways (like Uber).

Helps to me to make a decision, helps to get balance/perspective. Right to reply – two-way conversations.

#### **Sim Legal Consumer**

Gamification, scenario-led, what would you do?

#### **Train fare refund – Virgin West Coast**

Clear, right and entitlement. Expert told entitled, two clicks to get to, three minutes to find and complete.

#### **Groupon**

Crowdsourcing, collective solution, collective revision.

#### **Go Compare / Compare the Market**

Not just price: level of service, type of service, differentiators.

Transparency. Timesaving. Money saving. Market changer. Empowers users.

#### **NHS Choices**

Trusted, informative, triage. Diagnostic, symptom checker. Universal, multi-device, signposting. Asks me questions, predictive search.

#### **Jetty**

Quiz based, signposts you afterwards, very interactive. Tells you how much you can expect for rental value. Put in post code and details, it will instantly tell you how much rental – are you above or below average?

#### **Money Saving Expert**

Community, well moderated, very granular. Guest experts – people love free advice.

#### **YouTube**

Step-by-step video tutorial. Immediate, faster, real, persona. Video very popular – YouTube searches outstripped Google last year on desktop.

#### **Instagram**

Visual, starts with a picture but goes on the reviews/signposting (law is not very visual).



### **Airbnb**

Great navigation. User information. Ask questions directly of the owner. Very visual – nice to look at. Gives rewards. Market disrupted.

### **Ryanair**

Great booking – flexible booking. Bespoke. Transparency. Challenging. Breaking down needs.

### **Lyst**

Shopping website. Tells you brands and styles you like. It will tell you a sale is on. It does the leg work, working for you in the background.

### **Mortgage calculator**

Speedy, easy to use, gives you an answer/something to do.

### **Decision trees**

This will solve your problem.

### **RightsInfo.org**

Relatable content, which keeps up to date with current events.

### **Vouchedfor.co.uk**

Verifiable reviews which people can use to inform their own decisions.

### **AI Bot – Parking tickets**

Structure information with an AI façade to ask questions and provide responses.

### **Advice forums**

Provides a platform to link Legal Choices to organisations who deal with emotional support.

### **School careers service**

Proactive advice timed with key careers events, to be given to people who don't know that they need that information/advice.

### **Wordreference.com**

Encourages discussions and allows for the sharing of knowledge, whilst keeping it factual.

### **Wikivorce**

Authoritative element, but human-led advice. Human-led advice also helps to develop the more authoritative content for the site.

### **The Law Superstore**

Avoids assuming that all people accessing the site for services are the same – takes into account the unique needs of individuals.





## 4.0 How can I...?

Between the first and second days, the moderators themed the 'How might we...?' questions which were developed during the course of the first day and turned these into more user-centred 'How can I...?' questions, to focus the idea generation task. The 'How can I...' questions were presented to the room and refined over the course of the second day.

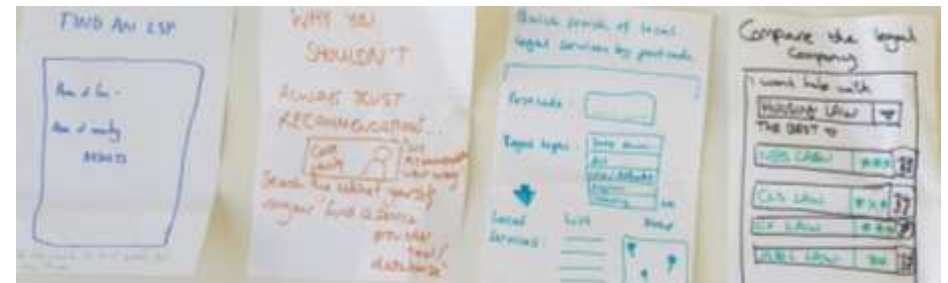
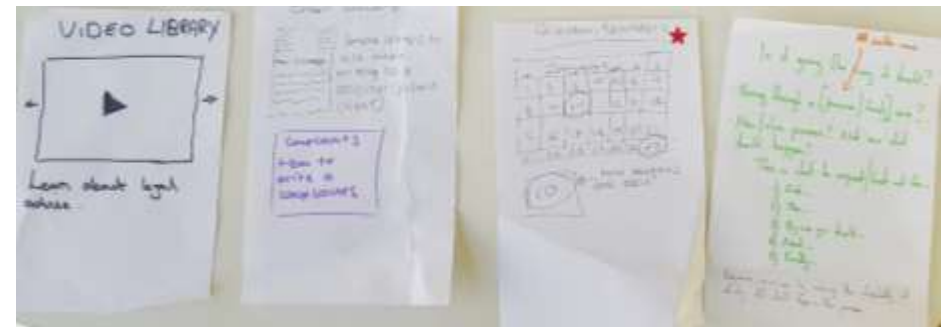
### How can I...

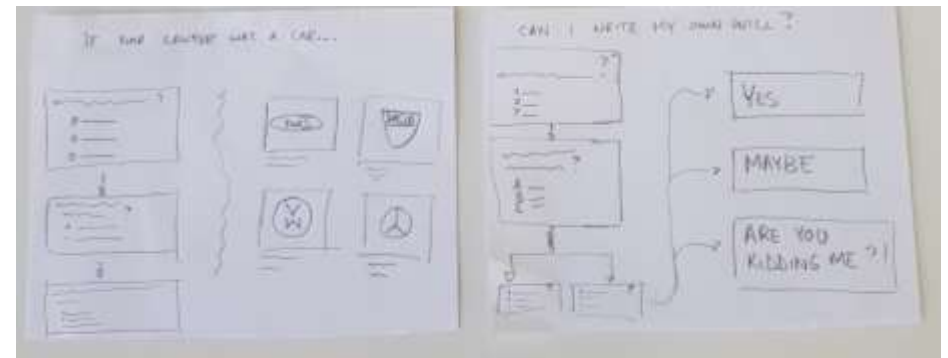
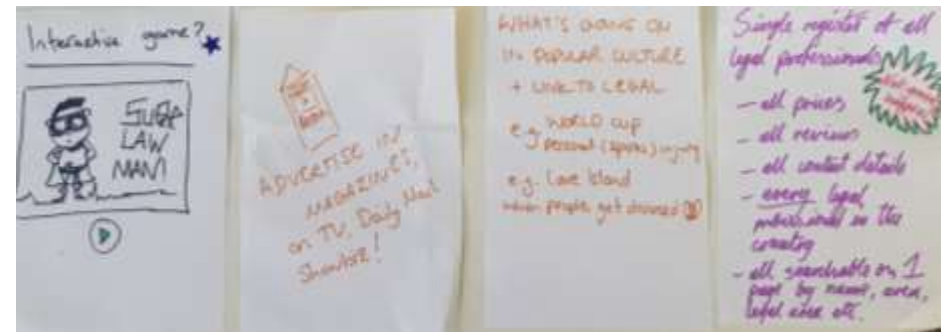
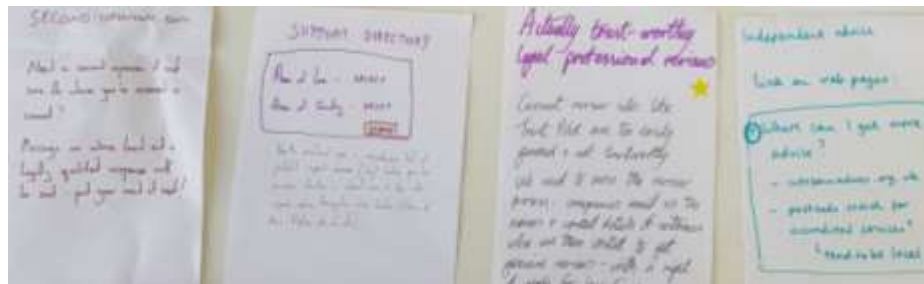
- ... Understand what the process is?
- ... Understand how the process might change?
- ... Cut through myths and homespun advice?
- ... Search the market for a legal services provider?
- ... Know where to get independent advice that I can trust?
- ... Manage my own legal journey to a resolution?
- ... Understand the cost of legal services and how I might be able to afford them?
- ... Know what a good legal service provider looks like?
- ... Know where to go (and where not to go) for emotional support during the process?

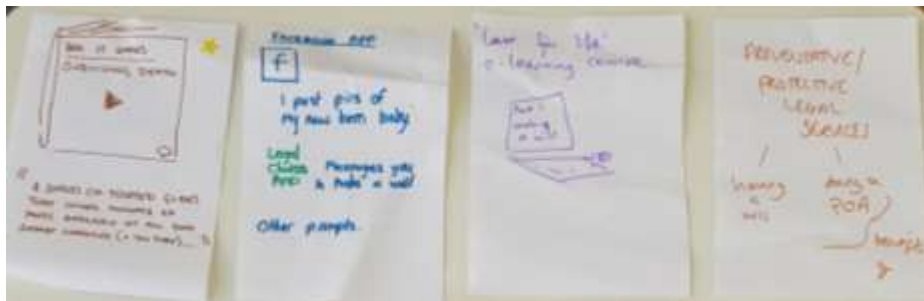
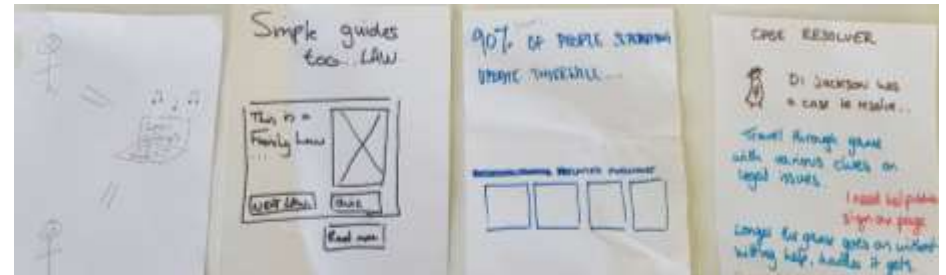
- ... Know what timeframes a legal problem will be resolved in?
- ... Understand legal terminology?
- ... Know that I have a legal problem?
- ... Know my rights?
- ... Speak to my legal services provider and ask the right questions?
- ... Know what to do if something goes wrong?
- ... Use legal services at the right time, not just in time of crisis?
- ... Deal with my legal problems without getting stressed out?

## 5.0 Ideation

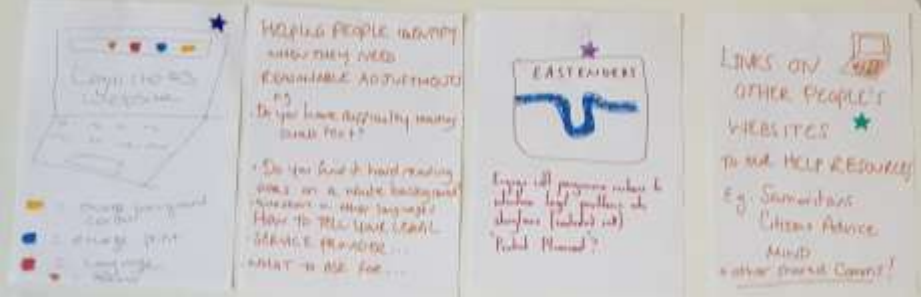
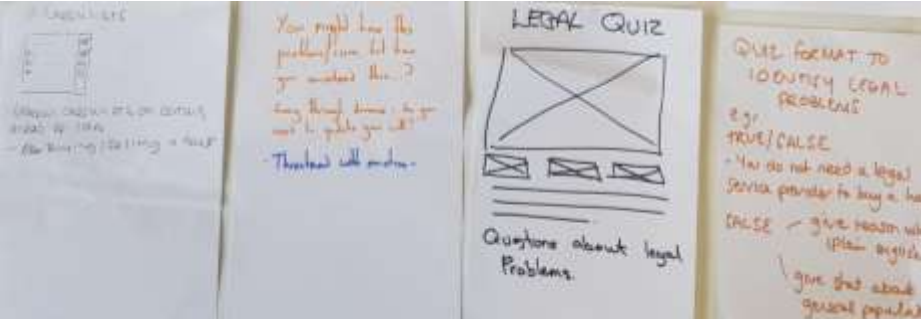
Working individually, workshop attendees were asked to generate ideas for how they might solve some of the 'How can I...' questions. Quantity, rather than quality, was the aim at this stage. The following ideas were generated.











**LINK TO POPULAR CULTURE**

eg Lewis with products on TV + (PRODUCT PLACEMENT?)

Everyone should write a bit to other courts like Simon is having...

And we need to legal choices!

**TECHNOLOGY/JARVIS EUSTICE**

ALL ABOUT OF LAW & CLASSICAL OF LEGAL JARVIS

**Translate Tool**

Want you "don't understand"

Means

LINK TO LEGAL CHOICES RESEARCH

**LEGAL TIMELINE**

SELECT PROCEEDINGS WITH ONE TIMELINE

OPPORTUNITY TO SHARE WITH CALENDAR

WILL RELEVANT PROBLEMS ARISE, SEE DEADLINE

**LEGAL THROU-BUSTER**

**WILLS COMPARISON TOOL**

NAME	WILLS	WILLS	WILLS	WILLS	WILLS
1	✓	✓	✓	✓	✓
2	✓	✓	✓	✓	✓
3	✓	✓	✓	✓	✓
4	✓	✓	✓	✓	✓
5	✓	✓	✓	✓	✓
6	✓	✓	✓	✓	✓

**INCLUDING COMPLAINTS**

IT'S NOT ABOUT THE MONEY! IT'S ABOUT THE ATTITUDE!

**LEGISLATING TRANSLATIONAL**

**LESS TO SAY**

**Examples**

10 questions to ask your lawyer when...

**Resources for advice-givers**

- Downloadable + Order to be sent - posters + Leaflets etc.

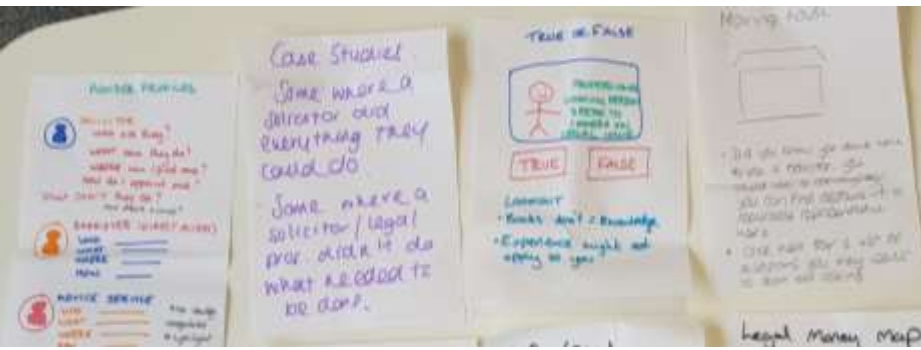
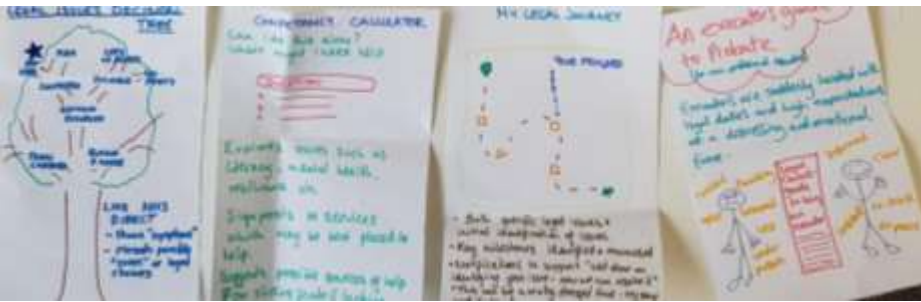
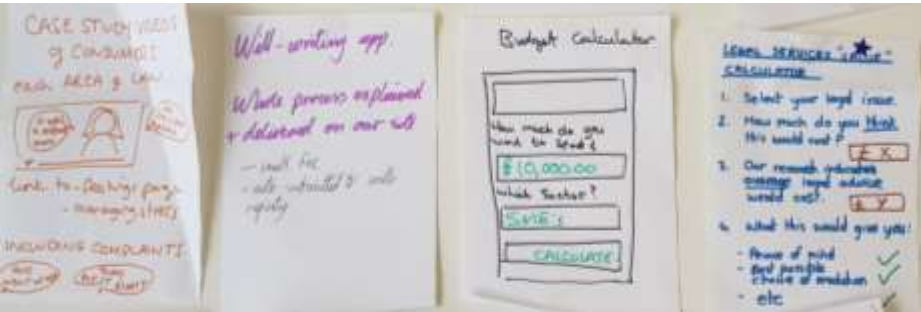
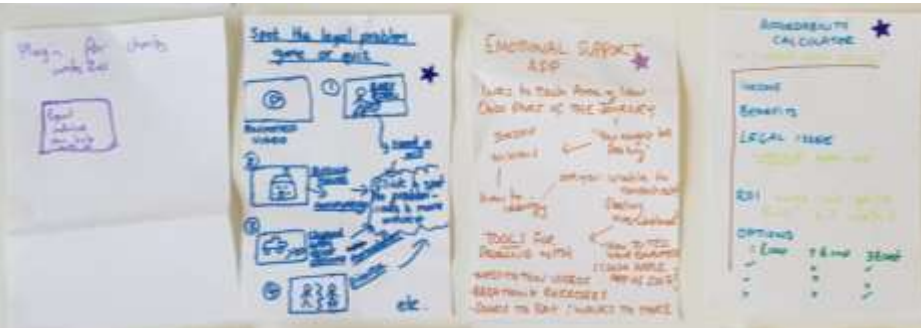
**Resources for THIRD SECTOR**

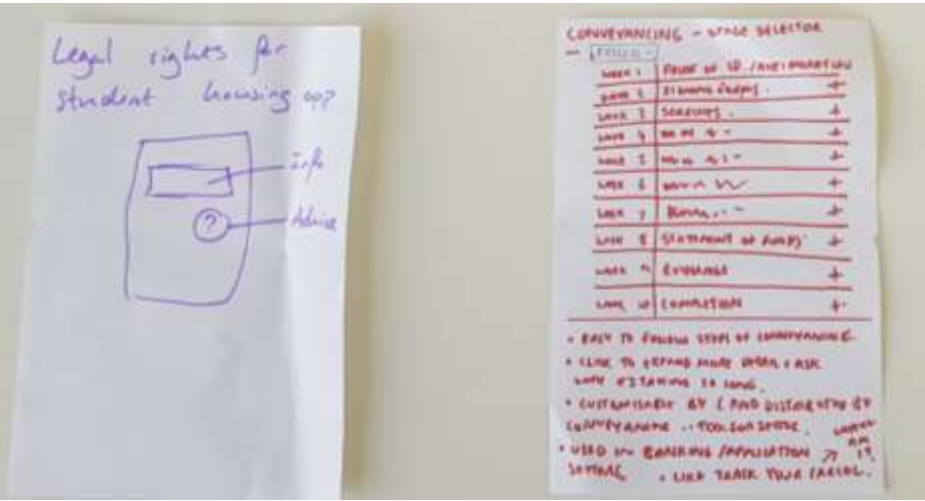
Section 40 help sheets etc to be passed onto hand to reach group of limited access

NON-LEGAL SOLUTIONS ARE IMPORTANT TOO!

Info about how to resolve conflict + mediation in given format









## 6.0 Fleshing out the ideas

In pairs, workshop attendees were then asked to pick two to four of their favourite ideas and flesh these out by answering the following questions:

- What is it?
- Who is it for?
- Why should we do it?
- When in the journey should it happen?
- What might it look like?

At the end of the session, groups were asked to present their favourite idea and the room voted on whether they felt the idea would ultimately be useful.

### 6.1 Complainorater

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#### What is it?

A tool to help you resolve complaints directly with your legal service provider.

#### Who is it for?

Any unhappy customers of lawyers.

#### Why should we do it?

- Empowers customers
- Cheap, quick, effective solution

#### When in the journey should it happen?

Mid- or end- of journey.

#### What might it look like?

Four areas for complaints to fall into: hard to reach, slow to respond, hard to understand. Fourth area not yet defined, but potentially around transparency of cost. It would show progress towards the resolution of the complaint.

#### Would this be useful?

Nine of fifteen workshop participants agreed this would be useful.

### 6.2 Legal starting point portal

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#### What is it?

A portal for users who think they might have a legal need to ask questions / find a starting point for dealing with their issues.

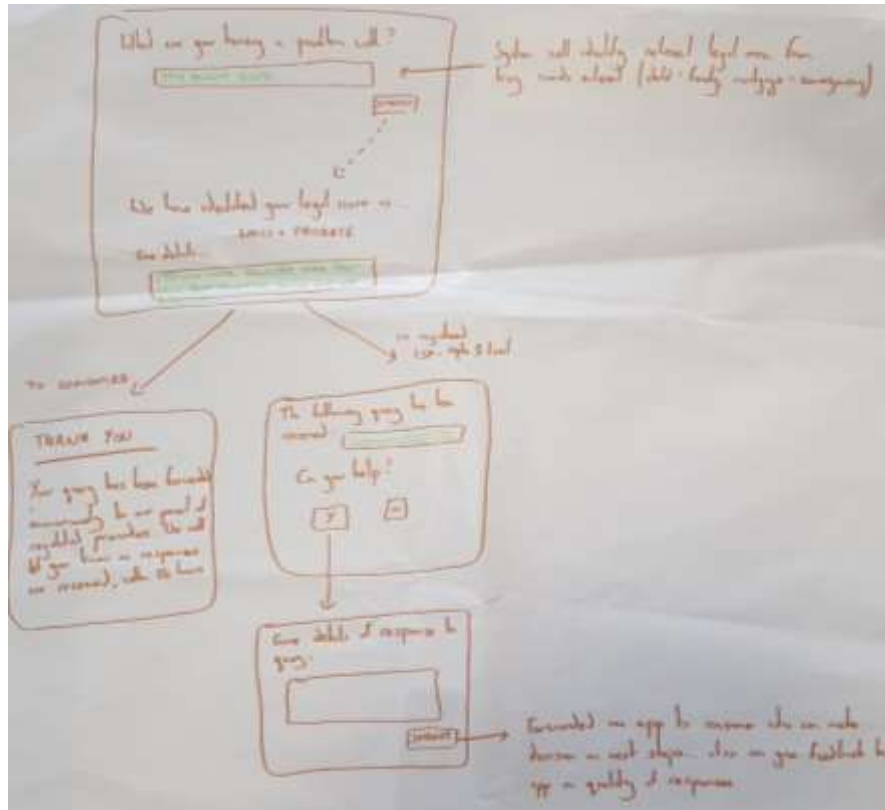
#### Why should we do it?

Enables to consumer to start the process without confidence / knowledge.

#### When in the journey should it happen?

At the start of the process.

### What might it look like?



### Who is it for?

It's for anybody who is going through a legal process.

### Why should we do it?

- It'll give people confidence they are in control
- Knowledge = power

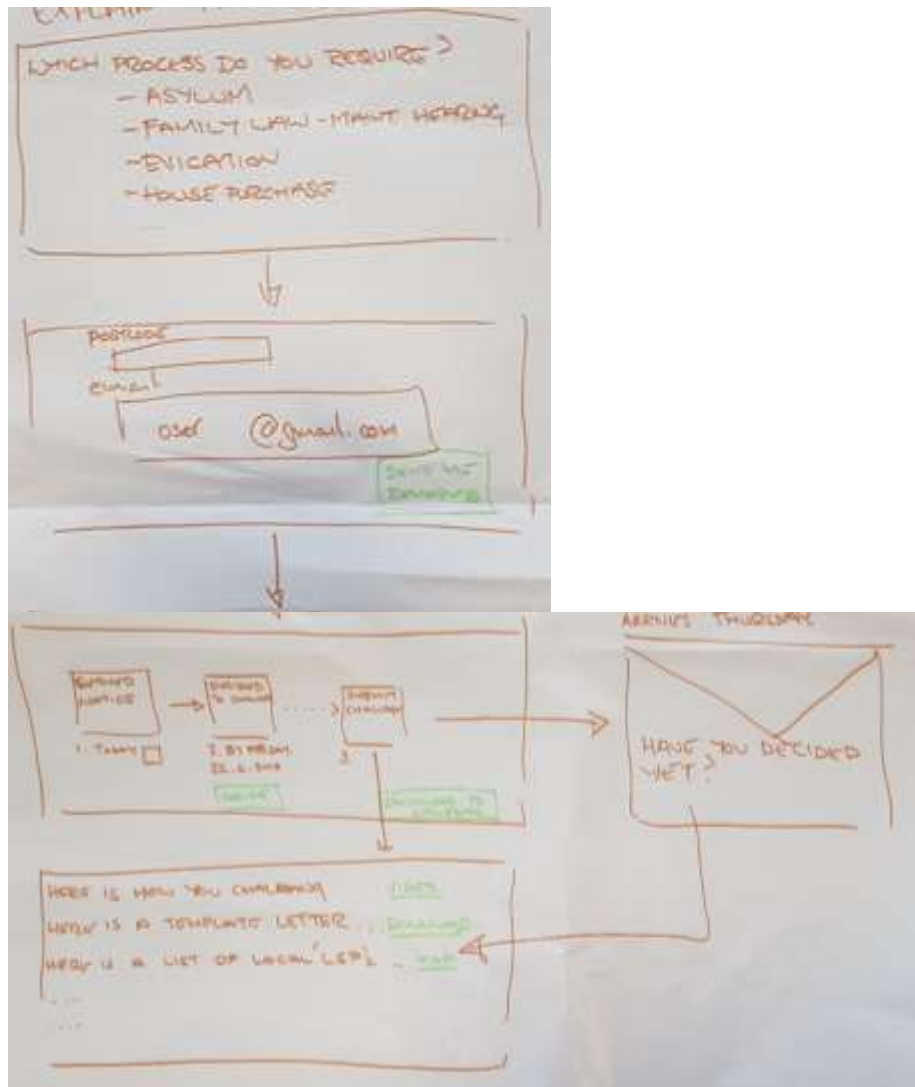
### What might it look like?

- User selects process
- Provides some 'triage' information
- Provide email address
- High level view of stages

## 6.3 Legal process maps

### What is it?

A system to explain the legal process in real-time.



#### 6.4 Find a legal professional

##### What is it?

A tool to help legal consumers find a suitable legal services professional.

##### Who is it for?

Someone who knows they need legal help.

##### Why should we do it?

- It doesn't exist
- High traffic / demand
- USP
- CMA!
- Quick win

##### When in the journey should it happen?

When I would need a legal services professional.

##### What might it look like?

List of links to registers and decision tree / app.

##### Would this be useful?

Twelve of fifteen workshop participants agreed this would be useful.

## 6.5 Timeline of legal processes

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### What is it?

Gives people an understanding of stages in legal processes so they can see what's next and where they are in their journey.

### Who is it for?

People engaging or involved in a legal process.

### Why should we do it?

To help people understand legal processes. Give people control (therefore knowledge) of their situation. De-stress situations.

### When in the journey should it happen?

Start of the process, although people may access the timeline at any point.

### What might it look like?

- Timeline style – points for each milestone / stage of the process. Click to find out more.
- Categorised by legal areas e.g. ET proceedings, conveyance, probate, divorce
- Key information includes the order of steps and the time involved.

### Would this be useful?

Twelve of fifteen workshop participants agreed this would be useful.

## 6.6 Legal costs: what you need to know

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### What is it?

To help people understand the potential costs of their case.

### Who is it for?

People who have a legal need and either want to know if they can afford it or those who have legal advisors.

### Why should we do it?

- To alleviate worry about costs
- Knowledge is power
- De-mystify advisor costs.

### When in the journey should it happen?

Available at the outset or mid-way if concerned or at the point where a complaint is considered or made.

### What might it look like?

Possibly average costs by legal professional type, legal problem type and geographical location. Calculator style.



Includes what you need to know, things to take into account, other funding arrangements available, and what you legal professional should tell you and when.

## 6.7 Reasonable adjustment tool

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### What is it?

Identifies reasonable adjustments needed and helps people to tell their legal advisor.

### Who is it for?

People who need help identifying that they need reasonable adjustments (e.g. disabilities) and they need these services adjusted accordingly.

### Why should we do it?

There's a gap in the market. People don't necessarily know to ask for larger font, other languages etc.

### When in the journey should it happen?

As soon as possible in the journey, but at any point.

### What might it look like?

After adjustments are identified, filters are applied to all content on the Legal Choices website (e.g. background colour, font size, language, size). Could like

with charity advocates e.g. link up with elderly / advice / disability charities that can help.

## 6.8 Legal problem pop-up

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### What is it?

Pop-up device to be embedded in partner websites.

### Who is it for?

Anybody across all groups – the 'silent sufferers'.

### Why should we do it?

75% of people don't know they have a legal need. 50% of SMEs go it alone when they have a problem. If we don't solve that – nothing will work.

### When in the journey should it happen?

Pre-need.

### What might it look like?

For example, if I'm on the Samaritans website, I've been on a page for 30 seconds, it might pop up and advise me I may have a legal problem or aspects of a legal problem. Algorithm would be decided on key for keywords, user journey etc.



May be used on popular culture websites, media (e.g. magazines, websites), Citizens Advice, or Chamber of Commerce.

Pop-up would need to be visible but not intrusive:

- Abandoned baskets – prompt technology etc.
- 21<sup>st</sup> century version of the Word paperclip
- Content aware
- Constantly learning?
- Work similar to paid advertising or possibly even using paid advertising mechanisms (e.g. newspapers).

### Would this be useful?

Twelve of fifteen workshop participants agreed this would be useful.

## 6.9 Chatbot

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### Who is it for?

Anybody who need to learn more about a complex (or simple) legal matter, or indeed to identify if they have one.

### Why should we do it?

Because nothing beats talking to a real person and being able to ask specific questions – this is the next best thing. High percentage don't know they have a legal need (SMEs and consumers). There's no worry of 'silly questions' or wasting people's time with a robot.

### When in the journey should it happen?

At multiple points. Easily on to help diagnose e.g. an app on Chamber of commerce website asking SMES about any challenged their business is facing at the moment. Or later on when deciding whether or not to go it alone, or indeed, what type of service is required.

### What might it look like?

Very simply user interface, simple search box, then conversation string identical to 'live chat' with a human e.g. tech support.

## 6.10 Rate your lawyer

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### Who is it for?

Consumers and SMEs.

### Why should we do it?

- Quality is hard to measure
- People love and want reviewers
- Right to reply
- Business benefits for lawyers, differentiate themselves
- Make the industry more accountable
- Empowering the user.

### When in the journey should it happen?

At the point of purchase or when things have gone wrong / brilliantly.



### **What might it look like?**

Simple – Google Review, TripAdvisor etc. Star rating. Would it include rates?

### **6.11 Non-legal solutions**

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#### **What is it?**

Recognition that some things can be resolved outside of the legal sphere and promoting the benefits of this i.e. less cost, less stress.

#### **Who is it for?**

For everyone who is in the beginning of their legal problem – when recognising they have a legal problem or even before.

#### **Why should we do it?**

Prevent unnecessary litigation, prevent stress on consumer, save money and time. Possibility of reaching mutually beneficial resolution.

#### **When in the journey should it happen?**

At the beginning of the process, before any legal action has been taken.

#### **What might it look like?**

Video explaining the benefits of resolving issues outside of the legal sphere. Videos of case studies where resolution was successful and unsuccessful.

Template letters to other parties. Conflict resolution tips (e.g. dos and don'ts).

### **6.12 Jargon buster!**

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#### **What is it?**

Glossary of terms linking to a permanent search bar on each page of the website. It translates legal terms and gives different contexts in all areas of law. Links to sources or further information.

#### **Who is it for?**

Everyone!

#### **Why should we do it?**

It is recognised as a need. Jargon is a barrier to understanding and accessing services. It would reduce anxiety and frustrations around lack of understanding and gives consumers more control.

#### **When in the journey should it happen?**

Throughout the journey – wherever needed.

#### **What might it look like?**

- Glossary of terms – people can look through
- Search bar to search by word
- Possible to search by area of law to narrow search



- Permanent feature on website
- Gives context, not just definition
- Plan English!
- Links to further information.

- Downloadable widgets, apps for their own website / intranet
- Posters and leaflets about Legal Choices and what it offers
- Branding – pens etc.

### 6.13 Resources for advice givers

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#### What is it?

Legal Choices information packs and resources for advice givers to use when supporting service users

#### Who is it for?

All third sector services providing advice – CAB, PSU, advice, clinics etc.

#### Why should we do it?

Promote Legal Choices and increase traffic. Support advice givers to help more effectively. Save time and increase capacity of advice givers.

#### When in the journey should it happen?

Earliest possible opportunity – initial contact with advice givers who do their own work to promote every intervention.

#### What might it look like?

- Handy pdf guides – process, how to find legal services, how to complain etc.

#### Would this be useful?

Fifteen of fifteen workshop participants agreed this would be useful.

### 6.14 Affordability calculator

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#### What is it?

Online widget or app to calculate estimated cost of X legal services – low, high, average £. Links to advice, legal aid information, legal expenses, insurance.

#### Who is it for?

General public, advice agencies, support organisations.

#### Why should we do it?

- Clarity of costs
- Debunk myths of unaffordability
- Improve transparency of the sector
- Give people the ability to budget and make informed decisions about proceeding
- Help negotiate payment plan?





### When in the journey should it happen?

Ideally at the start of the process but at any stage to check costs (lead to complaints / know your rights).

### What might it look like?

Online or app – able to print results or request an emailed pdf. Filter by postcode to reflect regional variations. For example:

1. General cost of a given service
2. Can I afford it? Savings, benefits, legal aid eligibility (quite complex!).

### Would this be useful?

Fifteen of fifteen workshop participants agreed this would be useful.

## 6.15 Triage tool

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### What is it?

Data / person capture tool which identified legal (and other) issues and signposts.

### Who is it for?

Someone who doesn't know they have a legal issue. Public place where people might present (e.g. GP surgeries, councils and local authorities, charities and support services).

### Why should we do it?

- Identify more service users
- Early intervention
- Massive demand gap in the market.

### When in the journey should it happen?

Before the start of the legal journey, probably after a negative event. After engagement with some kind of support agency.

### What might it look like?

Online survey which can be embedded in websites and enables access from a huge variety of sources. Identifies legal issues and signposts to services. Identifies other underlying issues.

### Would this be useful?

Ten of fifteen workshop participants agreed this would be useful.

## 6.16 Online resources

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### What is it?

Bank of useful documents which help explain legal services in everyday language.

### Who is it for?

- Friends and family
- Advice agencies – volunteers
- LiP (competency)

### Why should we do it?

- Make processes more accessible
- Agencies (non-legal experts) need advice too!
- Making legal services more accessible
- More confidence
- More clients able to use and engage
- More informed clients and users.

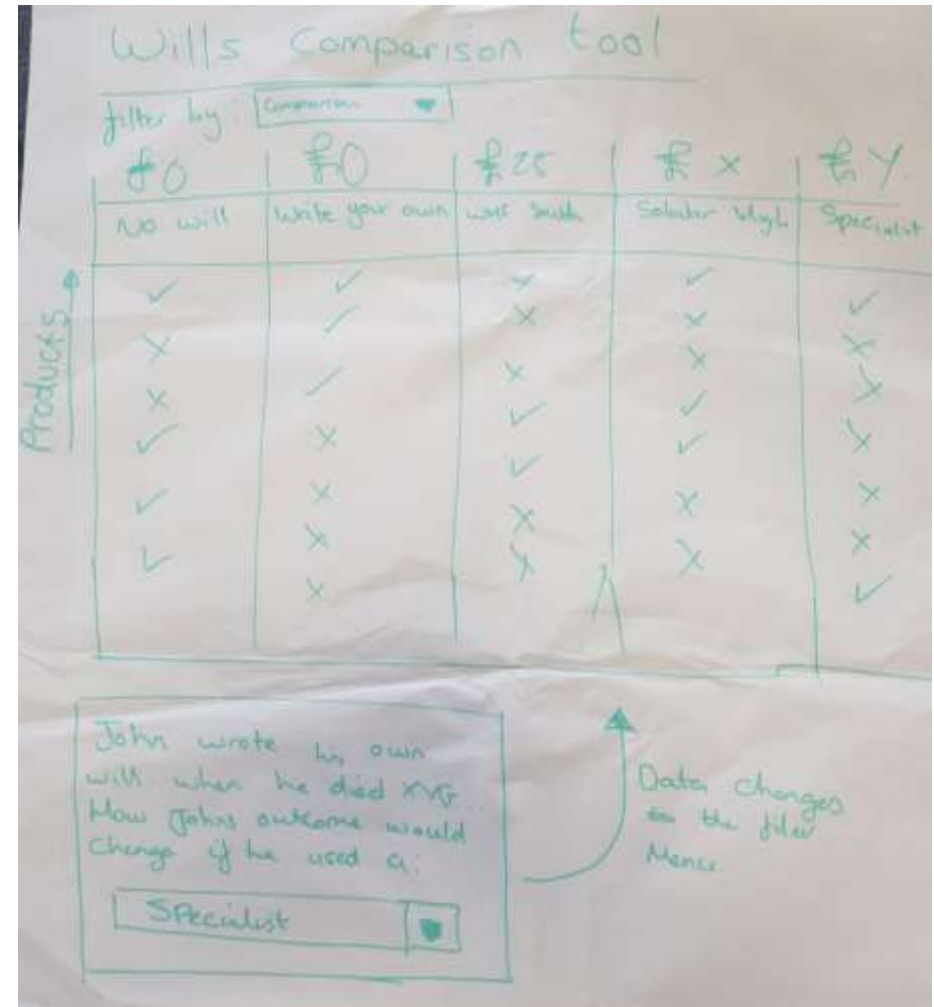
### When in the journey should it happen?

Ideally at the start but would be useful at any / every stage.

### What might it look like?

Hosted on Legal Choices website. Other organisations can link to it, driving users.

### 6.17 Wills comparison tool



## 6.18 The 'swoosh' area

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### What is it?

An emotional support app – a permanent link on Legal Choices content offering pure legal guidance.

### Who is it for?

Anyone!

### Why should we do it?

- Acknowledges that the legal world is intimidating, confusing and stressful
- Shows it's normal to feel like this
- Adds credibility to the rest of the site.

### When in the journey should it happen?

Any time.

### What might it look like?

- Smooth sequence into relaxing content
- 'Feeling overwhelmed by this?' button. On mobile, swipe right for emotional advice
- "Swooshes" to the side, into a calming, soothing design and colours, with advice such as: breathing exercises, lifestyle advice, stress management advice (with links to external resources)

- Rate 1-5 stress levels when first clicking and when leaving this section
- Feels very reassuring.

### Would this be useful?

Eight of fifteen workshop participants agreed this would be useful.

## 6.19 Legal problem pop-up (2)

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### What is it?

- A browser extension that you download from Legal Choices
- When you browse a site that could signify you have a legal issue, it pops up linking to relevant Legal Choices advice
- "Sounds like you might have a legal issue. Click for more"
- I.e. buy a cot – "you might want to make a will"

### Who is it for?

Anyone who wants to receive notifications about legal issues.

### Why should we do it?

- Exists in other sectors
- Prompts legal considerations at appropriate trigger points



### When in the journey should it happen?

At a point before they've done anything to think about a legal problem / before the problem exists.

### What might it look like?

As unobtrusive as possible – only see it when it may be relevant.

### 6.20 Video decision tree

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#### What is it?

Video format decision tree. Could be made for a variety of common legal issues and might include real case studies.

#### Who is it for?

Everyone experiencing this legal issue. Accessible as it is video (could have subtitles). Engaging as users can see outcomes in different routes.

#### Why should we do it?

- Accessible format
- Helps people to understand what to expect
- Easy “way-in” to potentially complex situations
- Easily marketable / sharable on social media
- It's original
- Makes Legal Choices stand out from the crowd

### When in the journey should it happen?

At any point.

### What might it look like?

- Short YouTube clips linked together
- Animated (avoids unrelatable actors)
- High-quality
- Not trivialising
- Humanises the issue

## 7.0 Outside the scope of the workshop

There were two spaces for ideas which were used to ensure that the two days could continue without distraction, whilst ensuring these were captured for a later date. These included:

- A 'quick win space': a space to put ideas which could be done more immediately
- A 'nice to know more' space: a space to record information which it would be useful to know more about

### 7.1 The 'quick win space'

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- Content strategy – common issues, e.g. holiday sickness, flight cancellations, to get people to engage
- Video explanations with high production value (text, explanations), including videos in other languages
- Being where people are e.g. Citizens Advice
- Links to mental health / emotional support / services / charities
- Translate guidance for charities e.g. Refuge Action

### 7.2 The 'nice to know more space'

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- Which part of the process will make the most difference to target
- What are people searching for online?
- What access do asylum seekers have to the internet, and at what points in the journey?
- What languages are people searching legal help in (including Welsh)?