Developing a Mobile Strategy to Reach Our Clients

June 19, 2013

LEGAL SERVICES NTAP
NATIONAL TECHNOLOGY ASSISTANCE PROJECT

LSC
America's Partner
For Equal Justice

probono.net

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LawHelp.org
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Goal & Agenda

- What to consider when planning a mobile project.
  - What type of mobile technology would best fit your needs, and what should you take into account?
- Agenda
  - General overview of mobile
  - SMS/text messaging campaigns
  - Examples of specific apps
  - Look forward- the next phase of mobile

Why Mobile?

	2011	2013
Adult Cell Phone users	83 %	85%
% of smart phones	35%	56%
% of web traffic from mobile devices	7%	24%
% households earning <30K/year using smart phones	22%	43%

Defining "Mobile"

- **SMS-** Text messages to/from a mobile phone
- **Apps-** Downloadable applications running on a smart phone or mobile device
- **Mobile sites-** Website with layout, content and design optimized for browsing on mobile devices
  - Responsive design vs. Dedicated mobile site

SMS Campaigns

SMS Text Messaging Campaigns- Increasing Access to
Legal Information and Referrals

State Bar of Georgia Pro Bono Project
_____

Georgia Legal Services Program

SMS Text Messaging Campaigns

- Legal Services Corporation Technology Initiative Grant
- Partners
  - Pro Bono Net
  - Georgia Legal Services Program
  - Illinois Legal Aid Online
  - Northwest Justice Project
  - LawHelp/NY Consortium

Statewide Legal Info Website
- Legal Information
- Legal and Social Services Referrals

SMS Texting Platform
- Select Content
- API Feeds

Marketing Services
- Marketing Materials Development
- Local Campaign Development

Text "Protective Order" to 99699!

- Text a keyword to an assigned SMS number
- Receive back tailored information based on responses to a set of questions.

Outreach Tool Kit, including a generic set of marketing collateral for each state's local campaigns

Appointment Reminder System
2012 LSC TIG Grant

Raquel Colon

Director of Development

Legal Services of Northern Virginia

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Appointment Reminder System

- Based on the concept of notifying clients via SMS message, email or voice message of their upcoming office appointments or court hearing dates.

- The system will use a cloud telephony platform that will interface with KEMPS case management system.

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Need for the Project

- To reduce the number of no-shows

- To integrate legal aid and technology

- To enhance access to services for low-income clients who have smartphones with SMS, voicemail, and email capabilities.

According to a February 2012 survey from the Pew Internet & American Life Project, "nearly half (46%) of American adults are smartphone owners, an increase of 11 percentage points over the 35% of Americans who owned a smartphone last May." In addition, a September 2011 Pew Internet & American Life Project survey indicated that "73 percent of all American now use their cell phones for text messaging."

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What are the goals?

- Increase efficiencies in the intake and client services delivery process.

- Increase utilization of our telephony system by reducing the number of calls for missed and/or rescheduled appointments.

- Minimize the amount of time an applicant has to wait for a new appointment.

- Increase the efficient use of our case handlers' appointment stock.

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How will it work?

LSNV will work with a developer to create an application programming interface (API). Companies that provide telephone platform include Twillio Cloud Communications, TelAPI, and Tropo.   For example Twillio provides a cloud API for voice and SMS communications that easily integrates notifications with existing software and workflow through Twillio's simple APIs and markup language.

Develop a customized appointment calling system that will consume extracted appointment data, place daily appointment reminder calls, log transaction data and expose call log information for call placement reporting and metrics.

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Case Management System

- KEMPS is an important component of the appointment reminder system as it serves as a bridge between the API functions and the database.

- Merge the messaging system to mapping fields in the KEMPS Clients tables.

- Develop coding and fields within the mapping structure that will not send messages to domestic violence victims who are not in a safe environment.

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PROJECT PLANS

PHASE 1

Requirements Planning

PHASE 2

Design

PHASE 3

Construction

PHASE 4

Cut-over

Appointment Reminder System

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Mobile Apps

The Illinois Legal Aid App

Gwen Daniels
Director of Technology Development
Illinois Legal Aid Online

How We Built The Illinois Legal Aid App

- 2010 TIG Grant
- Launched September 2011
- 7500 iOS downloads; 2000 active Android installs

Project Charter

- Purpose
- Who's Responsible
- User Scenarios
- Basic Requirements
- Promotion
- Timeline
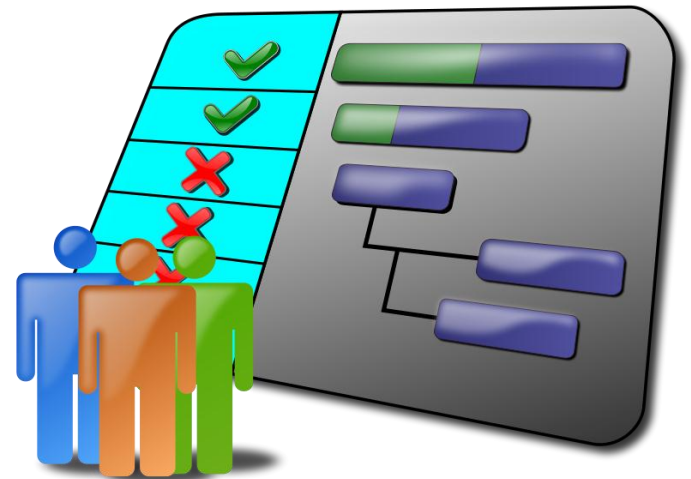
Prototype…

- Paper, PowerPoint, Illustrator…
- Balsamiq Mockups
- Axure RP
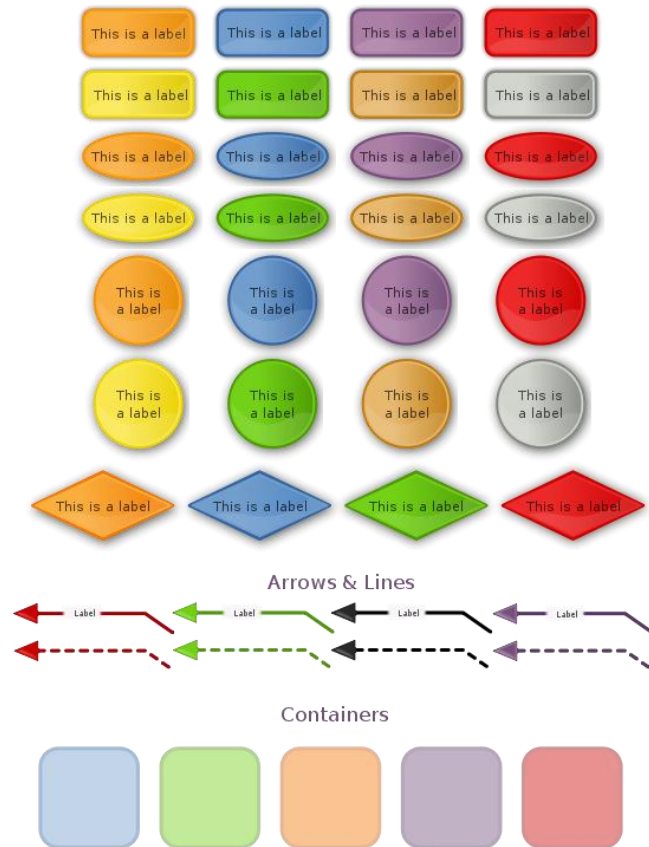
- What Platform?

- Will Apple approve it?

- Who is going to build it?

- How will you maintain it?

Content Considerations

- Existing content
- "Mobile friendly"
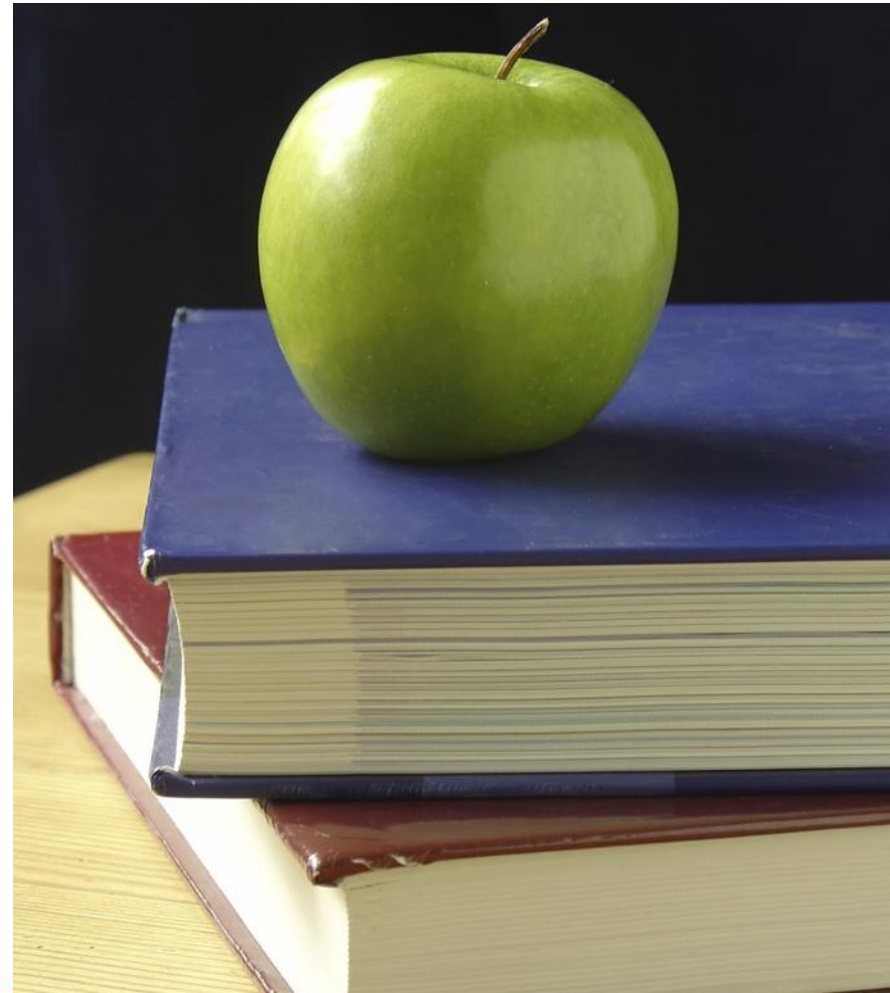- More than a mobile website
- Content restrictions

Usability Testing

- Design scenarios
- Observe
- Record
- Act
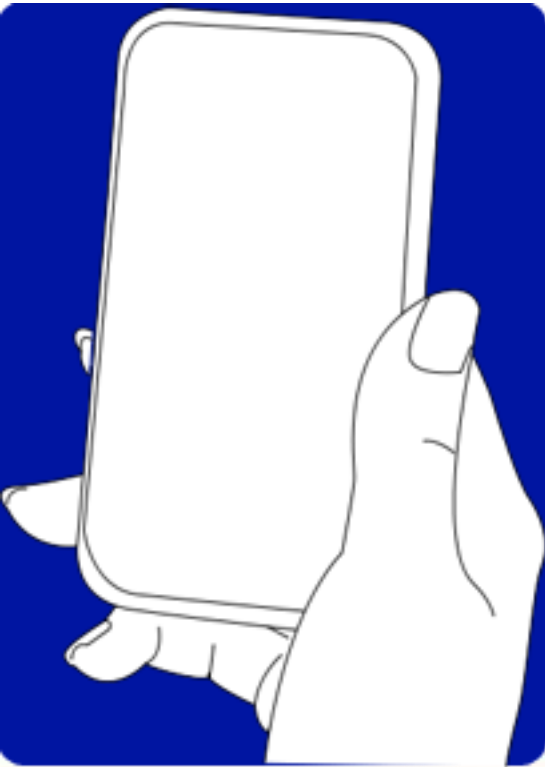
Lessons Learned

- Set scope
- Expect Ongoing Work
- Test early, test often
- Plan for the launch
- Is the ROI Worth It?

- Our documentation: http://www.illinoislegalaidonline.org/index.php?research#mobile

Presentation Preview

- Brainstorming and Requirements

- Wireframes and Design

- Content strategy

- Building and Testing

- Demonstration

CitizenshipWorks

Brainstorming and Requirements

Brainstorming

- **Clearly define the scope of app - avoid creep**
- **Features can always be added later**
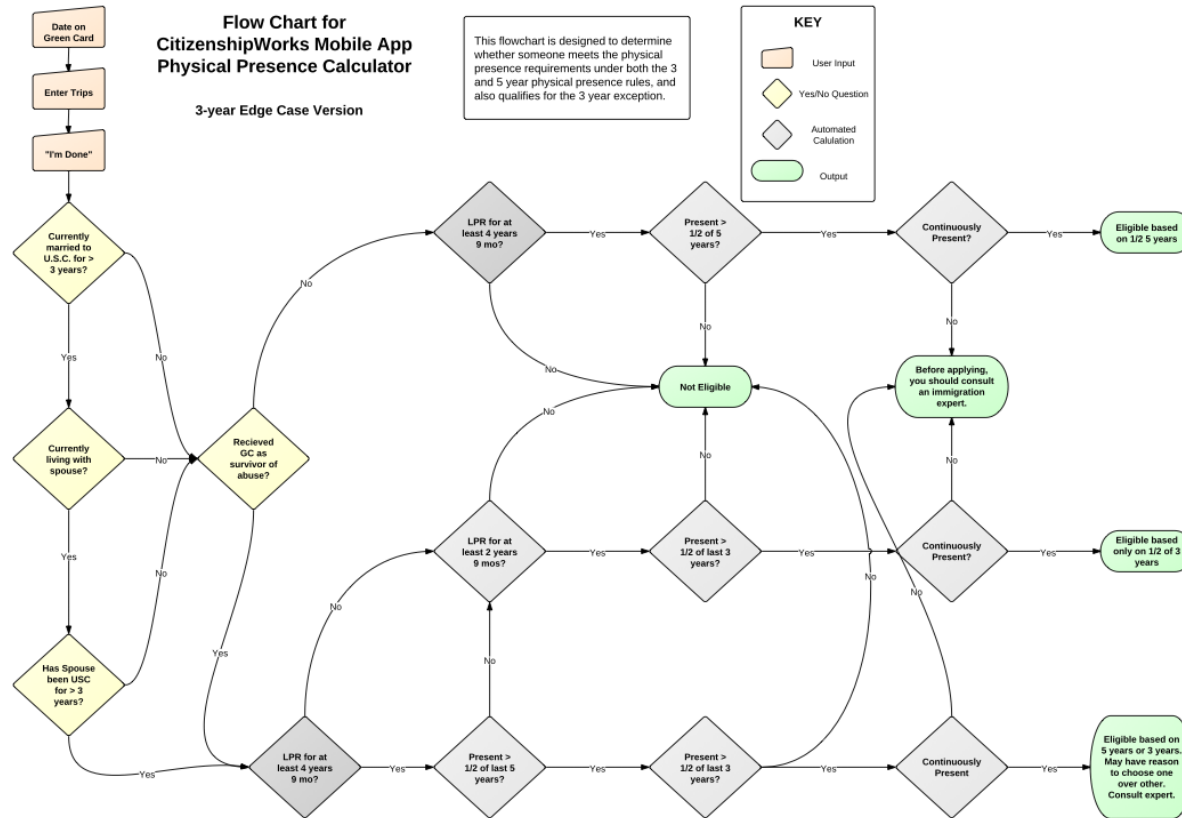- **Don't take the kitchen sink approach**

CitizenshipWorks

Business Requirements

- **Assess your team**
  - **external coders will require very specific requirements**
- **Do a thorough scenario map**
- **Create a comprehensive requirements document**

CitizenshipWorks

Logic Workflow Diagram

Wireframes and Design

Wireframes

- Wireframes: the skeleton of the app
- Easy to create: use PowerPoint (or Keynote)
- Can spot many UI/UX issues early on

Physical Presence Calculator Trips Screen
Listing of all trips taken by user since receiving green card

Physical Presence Calculator

Back   I'm Done!   +

My Trips

Mexico, January 2012
Jan 27 - Feb 4, 2012   **9** days

France, September 2011
Sep 4 - Sep 12, 2011   **8** days

Canada, September 2011
Sep 4 - Sep 12, 2011   **8** days

CitizenshipWorks

Prepare for Your Appointment Checklist Output Screen

Prepare for Your Appointmnet Checklist

To help you apply for citizenship, prepare the following:

- ☐ Your spouse's name
- ☐ Your spouse's birth date
- ☐ Date of your marriage
- ☐ Your spouse's Social Security number
- ☒ ~~Your spouse's address~~
- ☐ Date your spouse became a U.S. citizen (date of naturalization ceremony)

- ☐ Dates of all of your arrests, citations or charges
- ☐ Places of all of your arrests, citations or charges
- ☒ ~~Police and court records showing arrests, charges, convictions and penalties (fine, jail, probation, ect.)~~

CitizenshipWorks Mobile App
Learn About Naturalization

Spanish ◆

Title

The Physical Presence Requirement

Title

El requisito de presencia física

Text

Additionally, in order to qualify for naturalization, you must show that you have been physically present in the United States for a certain number of days in the past 3 or 5 years (this is called demonstrating ?continuous physical presence?). If you are applying based on 5 years of residency, you must show that you have been physically present inside the U.S. for at least half of all the days in the past 5 years (at least 913 days). If you are applying

Text

Además, con el fin de calificar para la naturalización, usted debe demostrar que usted ha estado físicamente presente en los Estados Unidos por un cierto número de días en los últimos 3 o 5 años (esto se llama demostrar? Presencia física continua?). Si usted está solicitando basa en 5 años de residencia, usted debe demostrar que usted ha estado físicamente presente dentro de los EE.UU. por al menos la mitad de todos los días en los últimos 5 años (por lo menos en 913 días). Si

character count 988

character count 1109

App Links

App Links

physical_presence_calculator
reading_test
writing_test
civics_test

physical_presence_calculator

Available App Links

⬇ ⬆

*Assigned

Other Immigration

Content ID

fdkvp12820ve3xmp

Submitted

Last Update   11/25/2012 by Tony Lu tlu@probono.net

<u>Cancel</u>   Submit

Design

- Unifying design elements
  - color scheme
  - typeset
  - images
  - icons
- Merging design and UI
  - Turn design elements (logos, etc.) into user interface elements

CitizenshipWorks

Content Strategy

Content Strategy

- Static Content
  - Front-load the work of preparing static content
  - Brevity and design: wire-frames and mock-ups help
- Flexible content
  - Content management + Feed
  - Delivery workflows
    - Staging & production
  - Content management systems
- Dynamic content
  - API feeds and calls

CitizenshipWorks

Building and Testing

Building

- Regular communication: developers and product owners (depends on requirements document)
- Collaborative project management system is crucial
- Be flexible in requirements and design

CitizenshipWorks

Testing

- Dedicate lots of time for testing
  - multiple devices
  - emulators
- Fragmentation will always be an issue
- Emulators: love/hate

CitizenshipWorks

Demonstration

Mobile Optimized Content

Legal Aid Services of Northeastern Minnesota
"Pro Bono to Go" TIG

Liz Keith

LawHelp Program Manager

Pro Bono Net

Project Overview

- 2013 TIG to Legal Aid Services of Northeastern Minnesota

  - Partners: Legal Services State Support, MSBA & Pro Bono Net

- Goal: Create a mobile version of ProJusticeMN.org featuring mobile-optimized settlement checklists and client interview guides

Why mobile checklists?

- Settlement opportunities can arise unexpectedly, often at court
- Good settlements can have tremendous benefits to the client
- But settlements have benefits and pitfalls that an inexperienced attorney might overlook
- Checklists can help with issue-spotting and make volunteers more confident taking cases outside their area

Why mobile interview guides?

- Walk-in clinics are a staple of volunteer attorney work

- Standardized interview guides can help practitioners get better and more complete information from clients   – and provide better advice as a result

- The guides can also speed up issue-spotting, making sessions more efficient

The technical approach

- PBN is developing an HTML5 mobile website application for the probono.net / ProJusticeMN CMS and a mobile-specific UI

- Content authoring and publishing tools will be integrated with ProJusticeMN and support cross-publishing

- After a pilot stage in MN, the mobile capabilities and authoring tools will be available to other probono.net sites through the probono.net API.

Content Priorities Survey

May 2013 survey by MLSC of pro bono coordinators and volunteer attorneys

In which areas would you find / have you found a settlement checklist most useful?

- Divorce (x12)
- Child custody (x8)
- Child support modification
- Parenting time disputes
- Employment
- Landlord-tenant

In which areas would having a mobile settlement checklist make you more likely to do pro bono work?

- Divorce (x5)
- Child custody (x4)
- Bankruptcy
- Landlord-tenant
- Small claims
- Trusts and wills

Top answers – attorney respondents

Content Priorities Survey

May 2013 survey by MLSC of pro bono coordinators and volunteer attorneys

In which areas of law would having a mobile client interview guide available make you more likely to do pro bono work? (Attorney respondents)

- Divorce (x6)
- Child Custody (x3)
- Landlord tenant (x3)
- Bankruptcy (x2)
- Wills and Trusts (x2)
- Child support
- CHIPS
- Domestic abuse
- OFP
- Family law
- Housing disputes
- Eviction defense
- Housing law

- Small claims
- Real Estate
- Any forms for business
- Citizenship applications
- U visa applications
- Immigration cases
- Unemployment compensation
- Probate
- Estate Planning
- Elder Law/competency
- Transactional

How volunteers want to work with the resources

I want to be able to:
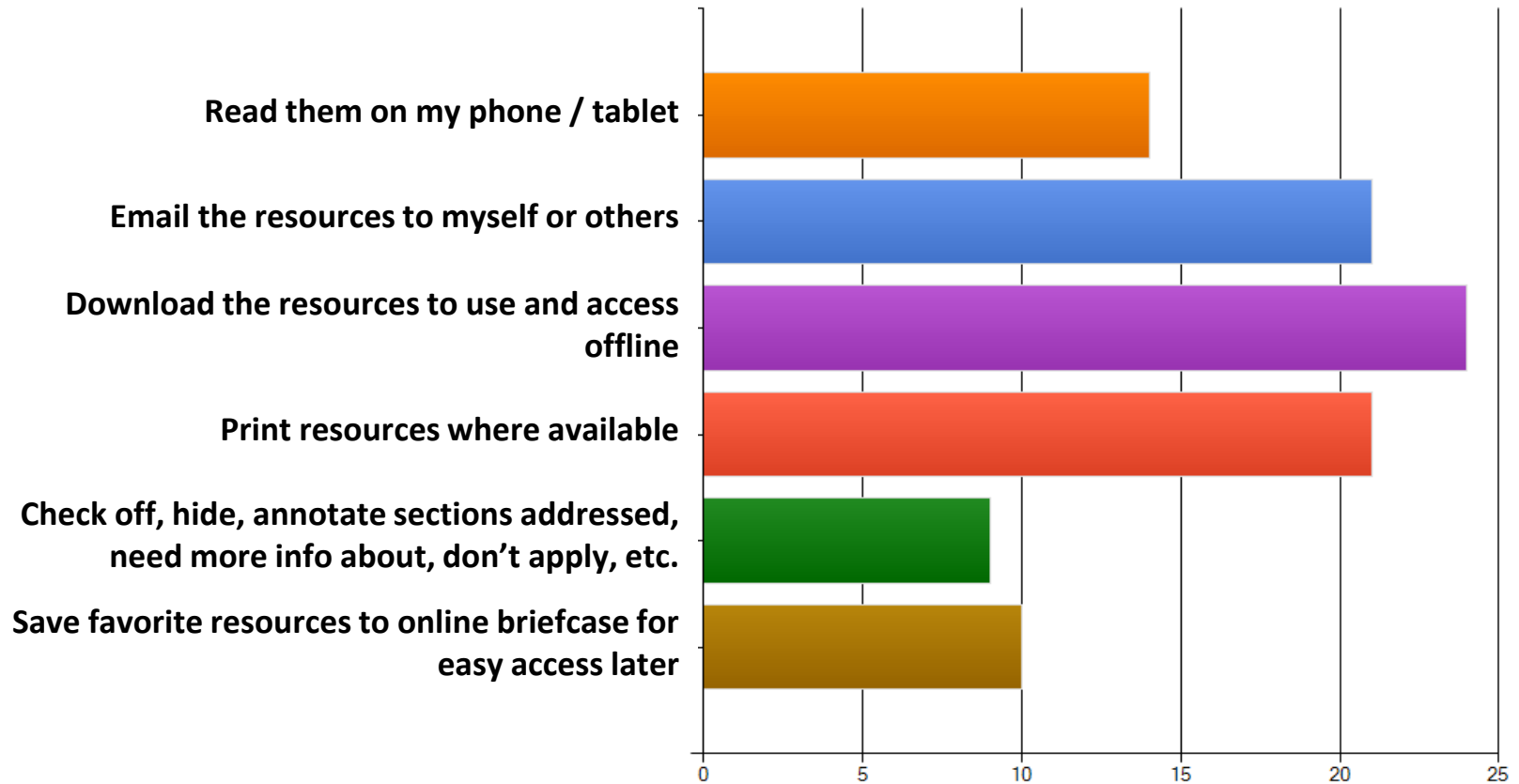
Project Contacts

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Additional technologies to consider

GeoLocation

- Collect data
  - Crowd source mapping for information with an SMS program

- Provide maps
  - Create static google maps optimized for mobile browsing

- Deliver services
  - Interactive geolocation for offices or courts

- *Source:* **Responsive Mapping Techniques And Mobile Geolocation**

Mobile Video

- Mobile Video on a Smart Phone
    - YouTube/Facebook other hosts are mobile accessible
    - Special considerations
- Video that interacts with cell phone users
    - Interact via text with video viewers
- Opportunity for user-generated content
    - What could your clients, volunteers or attorneys add to your video collections?

Integrated Voice Response (IVR)
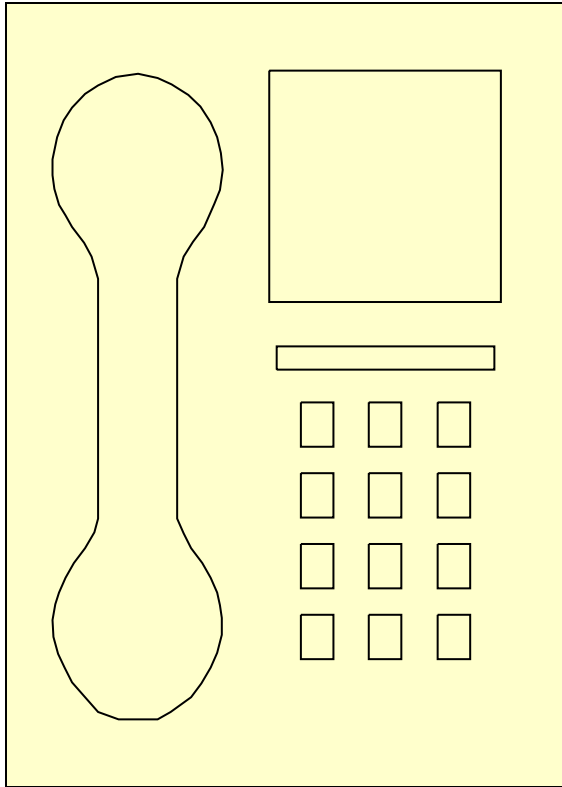
- Allows a computer to interact with humans through the use of voice
- Users can select options to receive specific information
- Can receive information in a variety of languages
- Can be accessible on mobile devices and landlines.

THANK YOU FOR ATTENDING TODAY!

Next up by PBN:

Online Resources to Assist Self-Represented Litigants

August, 2013

More information at www.lsntap.org

Contact Information

Brian Rowe (brianr@nwjustice.org) or via chat on www.lsntap.org

Don't forget to take our feedback survey!

http://www.surveymonkey.com/s/HJLKLDR