

The Savvy Lawyer's Guide to Virtual Law Practice

Teresa Gutierrez

Teresa Gutierrez Law

www.teresagutierrezlaw.com



**THE
BUSINESS
OF LAW**

CEB presents
The Business of Law webinar series
ceb.com

According to a recent Gallup Poll:

- around 51% of Americans worked remotely by April 2020
- two-thirds of those working remotely would like to continue to do so
- indicates an upward trend of remote work

The legal profession has been slow to adopt technology. Why?

- lawyers are trained to trouble-spot everything that could potentially go wrong and are very sensitive to risk and ethical questions
- learning curve—some firms are not willing to dish out the resources or commit time or money
- fears about tracking, targeting, and lack of privacy

Current conditions mean that lawyers will be forced to get comfortable with technologies

- need to not just survive but thrive and adapt to the times
- need for legal services to continue even as conditions have changed dramatically

Important to consider ethics; using technology does not absolve us of this responsibility

- standards that apply to traditional law practices also apply to virtual law offices
- there might be a duty to take further steps to ensure we are practicing ethically

The State Bar of California definition:

“A virtual law firm is a legal practice that does not have a bricks-and-mortar office, but operates from the homes or satellite offices of its lawyers, usually delivering services to clients at a distance using technological means of communication.”

What makes a lawyer savvy and able to provide virtual legal services?

- a willingness to try new things (systems, process, technology) and refine and repeat
- adaptability and flexibility
- grit
- and a focus on being exceptional, not perfect

What type of office makes sense for you? A full virtual office? A hybrid?

- you need an address to receive mail
- commercial leases involve the greatest commitment (up to five to ten years)
- subleases are often more flexible
- virtual office
 - For example, Barrister Executive Suites, Regus, WeWork (these have been impacted by the pandemic)
 - some of these can process mail as well
- home office
 - sometimes tax advantages to this set-up, but there are special requirements, so tax professional should be consulted
 - can use a post office box or mail box service company
 - some law libraries and Bar Associations make meeting space available

Modes of communication with potential clients and clients

- website (live chat)
- phone (calls only or texts too)
- on site
- virtual
 - phone answering service such as Smith.ai and Ruby can be helpful
- scheduling appointments
 - Calendly or Acuity are good apps for calendaring
- email
 - multiple accounts? (you and your team's names, information, billing, other)
 - domains are available from GoDaddy or Gmail for Business
 - Streak, Unroll.me for efficient email management
- Social media, online presence and platforms
 - Facebook (includes messaging feature)
 - Instagram
 - Twitter
 - TikTok
 - Avvo
 - Google My Business
 - LinkedIn

Managing your case files and sharing case information with clients

- software
 - Clio, PracticePanther, and MyCase allow you to track cases, send agreements, and get them signed quickly
- use hard drive & cloud for storing and managing files
 - wise to save files in multiple formats

Getting paid

- LawPay allows you to send invoice to clients with links to specified accounts

Equipment to help you manage the virtual aspects of your firm

- think about compatibility among your software and hardware and with your clients
- scanners
- tablets
- printers
- fax
 - RingCentral or Grasshopper can handle faxes for you without needing a fax machine
- phones
 - Google Voice, a call service or Ruby or Smith.ai may be sufficient in a virtual office
- internet
 - a wifi hotspot or jetpack can connect you wherever you go

Managing your workload and your team

- boils down to streamlining and automating
 - checklists
 - templates
 - handbooks (per case/position)
- employees versus contractors
 - ask yourself what tasks need to get done? what must you do as attorney? what do you enjoy doing?
 - Upwork and Fiverr provide contractors and freelancers
 - Zirtual provides college-educated, US-based virtual assistants

Pros and cons of virtual practice

pros

- minimize commuting
- minimize wear on your mind and body
- more easily juggle responsibilities of work and home (children, partners, pets, and so on)

cons

- minimal interactions with others
- issues creating boundaries between work and personal life
- an “always on” mentality

Reconciling the pros and cons of virtual practice

- create blocks of time to work when you are most productive
- try to have a designated work space (especially if you’re working from home)
- if you do not have a separate office or room for your work, consider setting up and putting away your work station each day to maintain healthy boundaries

Resources

<https://www.lawpracticetoday.org/article-categories/management/>

<https://myshingle.com/resources/startalawfirm/>

<http://www.allylozano.com/>

<https://www.lakhanylaw.com/collections/courses>

<http://www.calbar.ca.gov/>

<https://www.americanbar.org/>



CEB presents
The Business of Law
webinar series
ceb.com

Watch. Listen. Learn
visit ceb.com

Join  **CEB for FREE**
at research.ceb.com

