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Running the virtual law firm

A LOOK AT BEST MANAGEMENT PRACTICES AND TECHNOLOGY FOR YOUR REMOTE LAW OFFICE

The practice of law is finally catching up with the tech times. While other industries had long-adapted newer ways of doing things, the majority of courts were still doing paper filings, two-hole punching everything, and snail mailing every piece of correspondence. What a waste of time and paper!

Maybe it was COVID, maybe it was coming all along, but the judiciary is now largely adapting to the changing world around it. Electronic service is becoming the norm, and judges are frequently communicating with counsel via email to disseminate rulings on motions. We see jurors routinely using iPads and tablets to review evidence and keep up with trials. Witnesses can now testify anywhere in the world as long as they have a smart phone.

Where is technology taking lawyers and law firms? Well, hopefully to the beach! Literally! Now, more than ever, attorneys can practice wherever they decide to be, not where they *have* to be. Want to go surfing in Seal Beach in the morning and still make that 8:30 a.m. case management conference in San Bernardino? No problem! Check into Zoom in your wetsuit, say “Yes, your honor” five times, and not only have you done your cardio for the day, but you’ve also got yourself a snazzy new trial date (two years out).

There are a *lot* of attorneys who haven’t left the house in two years! And you know what, they are thriving. It is very easy to run a practice these days as long as you have a healthy internet connection. While we can go in depth on each of these issues, here are some quick and easy pointers on how to maximize your ability to work remotely.

Shared workspace

Most consumer/plaintiff attorneys are solo or small firms. The cost of leases may have dipped down a bit when landlords were scrambling during COVID, but they are soaring back up. But ... how often do you even *need* to go into the office? You can meet with clients, do expert depositions, and even hold team meetings all without having to put on pants. Yes, there will certainly be the occasional meeting or firm get-together that should be in person, but from a cost/benefit standpoint, these will become so scarce the cost of rent isn’t justified. You want to be in a place where there are other likeminded lawyers so you can evolve as a practice and a person.

Practice management

There used to only be a few options when it came to case-



management systems, but they were clunky and basic. Now, there are so many to choose from that you’ll send yourself into a panic vetting them all and wondering which one will be the best. I’ve sat through many seminars, webinars, meetings and concluded there are a few case management systems that are in a tier above all others. I do not want to puff up any one more than the other, so I will simply list each. If you have specific questions about any of these, you’re always welcome to reach out.

Filevine, CASEpeer, Litify and Clio are in a class all their own when it comes to case management systems for solo and small firms. Some of the onboarding may be daunting, but it all works out in the end.

Can you get away with *not* having (and paying for) all of these solutions? Yes! Most people are either using Google or Microsoft for their practice’s backbone. Google integrates with a lot of other applications, can handle your email, documents, PowerPoints, all with ease from the computer or the phone.

Everyone loves Microsoft Outlook, and when you sign up for Office 365 (monthly cloud-based service, per user), you also get Word, Excel and all the other products. The most overlooked is Microsoft Teams. This comes with your Office 365 annual subscription and can act as your firm's intra-office communication, and video meetings. In fact, a lot of courts are using Teams for video hearings. If you want to operate a business at a lower cost, we recommend choosing either Google or Microsoft and integrating other applications that work the best.

Remote staffing

Yes, having your staff work from home, unsupervised, can be scary. As an employer, you have to be able to trust your people to complete their tasks and do so on time. Allowing the staff to work remotely, you are permitting them to better juggle their personal lives and negate the lengthy commute to a physical office.

While there are applications out there that can count keystrokes, we'd recommend letting the work product tell the tale of competency. Obviously the first step is to interview a lot of candidates and choose ones that will be trustworthy and self-starters. And if some want to still come into physical workspaces, that's when a membership to a co-working space comes in handy. There are virtual assistants out there, applications that can do all your intake calls, route your calls, and even outfits in India that will do full-on medical reviews for you, do deposition summaries, and some even write/oppose motions. We use Bolster Legal with great success when we have to outsource some daily tasks that can get overlooked when a trial or two are going on.

We'd say the hardest thing is getting the team together for morale. There's only so much you can do through a video camera! With all that money you've saved not having office space, maybe splurge for a suite at the Dodgers game to get

everyone together. The constant chatter you'll have within your internal messaging platform helps, too. Teams, WhatsApp, G Chat ... all great ways to keep it light at work.

One pointer: If your staff is working from home, you do have to compensate them for use of their home internet and other utilities that are now used for "your business." It's very hard to quantify, but is something that should be worked out in advance.

Best remote applications

This list is by no means meant to be exhaustive. You'll need some kind of phone service to intake calls. Ring Central is one of the best. This application works well on the Cloud and can also be used as your video conferencing solution. Speaking of video conferencing, you're going to need to have a Zoom account because that's what most people use. Remember Skype? Yeah, we don't either. It's all Zooming, all the time (so much that it's become a verb).

Like we mentioned above, Teams also has a great video-conferencing solution, as does Google. If you're already paying for these services for your document database management, you might as well use the other features.

Another key application is remote signing of documents. As lawyers, we are constantly needing to sign things, having our clients sign things, etc. DocuSign was early to the game, and still probably the front runner. It works well with most APIs of major applications. We'd also recommend Adobe Sign, which again works well with Teams. Filevine, mentioned above, has "Vine Sign" that allows firms to get client signatures with a click of a button.

KW Court Reporting and Steno are court reporting agencies that have amazing platforms that make remote depositions easy. Do you hate discovery? You and everyone else! EsquireTek makes this easy and will save a lot of time when responding to lengthy discovery requests.

Intake

Some people need to get more cases. Some people cannot keep up with the flood. Regardless of where you are, you need to have systems in place in order to quickly engage the consumer or referring lawyer, and most importantly, store all that data and make sure it quickly "speaks" with your case management system and/or CRM (Client Resource Management). Every call, or website chat, or SMS is not only an opportunity to sign that specific case, but to continue to market that contact in perpetuity!

There are great systems out there that assist you with creating your website, optimizing it for SEO if you ever want to go that route, and come with chat bots that will feed directly into your systems. They can also handle your reviews, get them directly from your customer, post them where they need to go, and act as a mini-CRM! They can be very affordable. Look into Freshwater Law and Whippy. Great resources.

Search Engine Optimization – SEO

This can be very expensive and intimidating for most. However, you get what you pay for, and if you want to make an investment, the best of the best are LawRank, RankingsIO and Hennessey Digital. But make sure you are ready for the incoming calls!

We could go on forever about this stuff. Feel free to reach out to those who are successfully running firms in this new digital world. You can have more freedom, cut your overhead, run your firm from your smart phone, and, gasp, dare we say it.... Actually have a quality of life and hang with your family!

Robert T. Simon and Brad M. Simon are the co-founders of The Simon Law Group (aka Justice Team) and are co-founders of Justice HQ. Since launching their firm in late 2009, the firm has grown from a boutique office with just a few people into an highly successful practice recognized by its peers throughout the State of California and now Texas.