



3 TECHNOLOGY TOOLS TO BUILD A **VIRTUAL LAW FIRM**



www.goclio.com

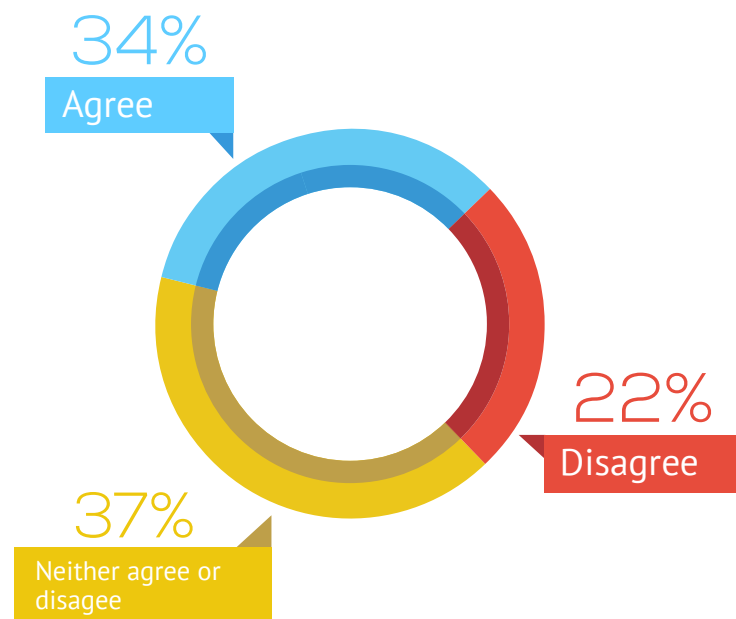
As the landscape surrounding legal services continues to evolve, lawyers are turning increasingly to virtual law firms to remain competitive, control costs and elevate their level of service to clients.

Whether starting their own practice, competing with unbundled legal services, or growing an established firm based on cash flow, lawyers have found that virtualizing their practices can lead to several perceptible benefits, including:

1. Improved productivity/efficiency
2. Increased flexibility
3. Cost-Efficacy

Client awareness of virtual legal services, such as online communication and document sharing, also seems to be aligning with the growing number of firms that are providing some of their services in a virtual capacity.

WOULD YOU BE MORE LIKELY TO CHOOSE A LAW FIRM THAT OFFERED THE CONVENIENCE OF ONLINE ACCESS TO LEGAL DOCUMENTS OVER ONE THAT HAD NO ONLINE CAPABILITY?



YouGov recently reported in a survey of legal consumers that "34% of respondents said they would be more likely to choose a law firm that offered the convenience of online access to legal documents over one that had no online capability; 22% disagreed and 37% neither agreed nor disagreed."¹

Underlying the success of any virtual law firm is the effective use of technology.

In this eBook, we'll review how technology tools are indispensable to any virtual practice.

¹<http://www.legalfutures.co.uk/legal-services-act/market-monitor/60-of-consumers-would-buy-legal-advice-from-brands-like-barclays-aa-co-op-and-virgin>

TECHNOLOGICAL SOLUTIONS

AND THEIR APPLICATION WITHIN A VIRTUAL LAW FIRM

While the logistics of operating a virtual law firm are generally less complex than those of a physical practice, operating virtually comes with its own idiosyncrasies. Contrary to a traditional “bricks and mortar” law office where up-front capital outlays are poured into fixed costs like commercial office space and full-time administrative overhead, a virtual law firm revolves around technology tools and processes designed to minimize risk and fixed expenses.

From an operational context, technological solutions can support, augment or reform the following key areas for a virtual law firm:

- 1 CLIENT COMMUNICATION**
- 2 DOCUMENT MANAGEMENT**
- 3 PRACTICE MANAGEMENT**

In successfully deploying a virtual law firm, solos and small firms stand to overcome many of the obstacles that prevent them from competing with larger firms and commoditized legal service providers. Moreover, the virtual law firm model gives lawyers the ability to control all aspects of their practice, without sacrificing their bandwidth to focus on client matters.

Underlying the success of any virtual law firm is the effective use of technology. Let's review how technology can be applied to these three core areas of a virtual practice.

CLIENT COMMUNICATION CONVENTIONAL COMMUNICATIONS

Using internet-based services, virtual law firms can seamlessly replace conventional in-office communication tools like telephones and faxes without impacting their clients' experience.

VOIP

Voice over IP (or VoIP) is a cost-effective way to emulate a centralized phone system for virtual law firms. VoIP phone services route telephone communications through internet connections rather than phone lines, allowing a firm to set up a main number that can be routed to a lawyer's computer, smartphone, tablet or any other internet-enabled device. VoIP enables a law firm to use a single telephone number for client communication and have incoming calls reach the firm's lawyers regardless of location.

Most VoIP services are readily available as online or downloadable solutions, and require little to no hardware investments such as PBX boxes or telecommunication wiring. As VoIP services and ISPs have evolved, VoIP configurations now boast as robust a feature set as centralized landline systems, including voicemail clips delivered to email, native smartphone applications and transcription of messages to text/SMS.

Call-forwarding is a subset of telephone services that forwards calls seamlessly from one number to another. Lawyers can use call-forwarding to route multiple numbers to a single phone. In this way, lawyers can have a separate number for their law firm and still have calls sent to their personal mobile phone.

The combination of VoIP and call-forwarding services eliminates the need for landlines and centralized phone systems. Moreover, these services tend to be cheaper than traditional landlines since no expensive hardware is required, and rates for nationwide calling are more competitive than large telecom carriers.

"Since using the Unified Communications solution, our law firm has been able to capture and account for 100% of our phone calls... increasing revenue by 100%...created a better client experience for our lawyers and our clients."

Luke W. Ragsdale - Rahaman Law Firm, PLLC

Example Service Providers For coMmunication solutions

gUnify™

E-FAXES

E-fax services can replace conventional fax machines by allowing lawyers to send documents to another fax machine through email. The actual documents to be faxed are sent as a PDF attachment to the email, with the email text serving as the cover letter. In the same manner, any fax sent to a virtual firm is received directly by email.

CLIENT COMMUNICATION CLIENT COLLABORATION

While virtual law firms often lack the physical space to host regular or ad hoc client meetings, they are uniquely equipped to collaborate with clients online by deploying tools like online communication portals or extranets.

ONLINE COMMUNICATION PORTALS

Using an online communication portal lets attorneys and clients stay connected. An online communication portal gives clients a medium to access documents relating to their matters, and the capacity to communicate asynchronously with their attorney. In some cases, communication portals also integrate with practice management systems, allowing virtual law firms to deliver client invoices electronically and process payments online by credit or debit card. This can substantially reduce the number of nuisance calls received by the law firm while giving their clients real-time visibility into their matter.

Another clear advantage of online communication portals is that activity within the portal is logged. If a client has not read a document sent via such a portal, the attorney is able to see that information and inform the client accordingly. Similarly, should an opposing party claim to have not received information, an attorney using a client portal will have a timestamp of when that document was last viewed.

An online communication portal is also a secure choice for an attorney. Rather than sending an unencrypted email, a virtual law firm may send a communication that is private, leveraging modern security measures and ensuring that reasonable care has been taken in corresponding with their client.

ONLINE COMMUNICATION
PORTAL SERVICE PROVIDERS



DOCUMENT MANAGEMENT

Having a central storage location for firm files and documents is crucial to operating a law firm. Traditional law firms typically store files in a centralized file cabinet or server. Virtual law firms seek to store all files in digital format, and centralize them in a cloud-based solution independent of a lawyer's physical location yet still accessible to the entire staff.

Storage providers such as Box, Dropbox, Google Drive and NetDocuments allow law firms to store documents online, either for free or with a premium plan that charges only for space actually used.

Cloud-based document management systems also allow firms to store their documents in one location and access them from any device. Such systems range in complexity from simple storage to version-controlled detailed repositories. NetDocuments, for example, is a service that offers control of the metadata associated with each file as well as local storage options. And unlike physical document libraries, cloud-based document management systems also provide a number of productivity and collaboration features such as sharing and editing.

Using a cloud-based document management service is also a key first step toward developing a paperless law practice.

PRACTICE MANAGEMENT

Practice management solutions usually serve as the central platform for managing a significant portion of a lawyer's daily workflow. From task and matter management to time tracking and reporting, a good practice management solution allows a lawyer to operate efficiently by promoting organization and mitigating redundancy in relation to everyday tasks.



REPORTING

Strong reporting is the most essential service that a good practice management platform provides to virtual lawyers. The ability to report on key performance indicators, such as productivity and time spent per matter, is crucial when calculating solvency and profitability. Modern practice management platforms include dashboards and built-in reports to give law firms instant snapshots that characterize a firm's performance. This also gives a virtual lawyer better visibility and control over the mechanics that drive cost, productivity and efficiency.

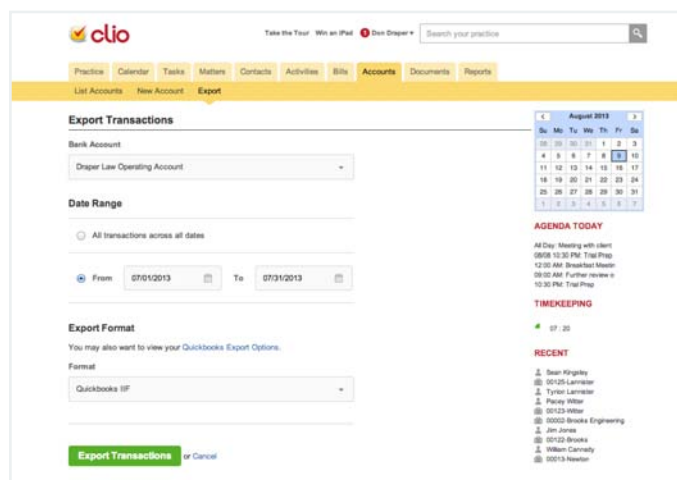
CREATING A HISTORICAL ROADMAP

Corey Carter | Stephens & Carter LLC

Corey runs a report of all firm matters to see price, percent of total income, kinds of cases, and referral source. The report provides the firm with "a really good past "road map" of where and how we've been getting clients"

EXPORT

Virtual law firms need ready access to their data. Their focus on cutting-edge tools and methods mean that virtual law firms will only choose tools that allow for easy entry and exit. Therefore, virtual law firms look for practice management vendors that support the ability to export data at any time since systems that attempt to lock a law firm into a proprietary system work against the virtual model.



A preview of the Clio export screen

CONTACTS AND CONFLICT

Professional responsibility rules are vitally important for any lawyer, and virtual lawyers need to make sure that their practice management software has a global search feature that searches across contacts and files, and provides the ability to do comprehensive conflict checks. A global search feature prevents virtual law firms from working with clients who are conflicted out.

TIME TRACKING AND BILLING

Time tracking and billing is another essential feature of a practice management platform. The ability to track time from any device or location enables law firms to accurately bill for all hours worked. Standard features of a practice management system include built in timers, associating time with specific case files and compiling all the time easily for billing purposes.

TIME AND BILLING FROM ANY LOCATION

Eric Johnson | Utah Family Law

Eric Johnson, principal and founding attorney of Utah Family Law, recognized the value of "everything has a place, and a place for everything" after starting a law firm. Two things spurred his movement from paper tracking to the cloud: difficulty in tracking time using spreadsheets and Word documents, and difficulty in generating reports in order to understand firm cash flow.

SYSTEM MAINTENANCE

Maintaining software across disparate locations can be a challenge for virtual law firms. Virtual lawyers use a variety of devices, and need software that displays necessary information efficiently, regardless of platform or device. Law firms looking to expand virtually should choose a practice management platform that allows for instant, online updates. This ensures that all lawyers and employees are using the same version as they work, and firms have access to the most up-to-date solutions.

Cloud-based practice management platforms are the most easily deployed and updated systems available. Updates are available immediately upon login, as they are done in the background seamlessly, thus requiring no manual intervention.

CONCLUSION

THE VIRTUAL LAW FIRM MODEL

Online technology plays a fundamental role in the operative components within a virtual law firm model. By utilizing technologies such as a practice management solution, online communication services and document storage solutions, a lawyer today can single-handedly manage a large majority of the tasks required to run a physical practice from any location. As current trends and statistics on virtual law firms suggest, the rate of new virtual practices is growing incrementally as lawyers are becoming more aware of the benefits of the model and its influence on a practitioner's efficiency, the ability to operate in an agile manner and the ability to control cost and overhead.

START BUILDING YOUR OWN VIRTUAL LAW FIRM.

WANT FIRSTHAND EXPERIENCE ON WHAT IT'S LIKE TO GO FROM A PHYSICAL TO A VIRTUAL PRACTICE?

Join Garry Berger, founding partner of the virtual law firm, Berger Legal LLC, as he shares the ins and outs of transforming his solo practice into a virtual firm that now competes globally.

LEARN MORE ABOUT

- [WHAT IS A VIRTUAL LAW FIRM?](#)
- [HOW ARE VIRTUAL LAW FIRMS ORGANIZED?](#)
- [WHAT ARE THE BENEFITS AND CONCERNS SURROUNDING VIRTUAL LAW FIRMS?](#)
- [WHAT TECHNOLOGY DO YOU NEED TO BUILD YOUR OWN VIRTUAL LAW FIRM?](#)

HOW TO BUILD A VIRTUAL LAW FIRM

REGISTER TO WATCH →

