

# LAWCLERK

## CHECKLIST FOR A SUCCESSFUL VIRTUAL LAW FIRM



**Congratulations!! You've made the decision to build the virtual law firm of your dreams. You've set up a sophisticated home office and built a stunning website. What's next? Here's our 7 tips for a successful virtual law firm.**

### 1 Get Organized.

One of the first steps of a successful virtual law firm is to select a practice management system. This will help you organize your calendar, deadlines, tasks, time keeping, billing and much more in one convenient place. Thankfully there are many to choose from including Clio, MyCase and RocketMatter to name just a few. Plus, most practice management systems will offer integrations with other tools you are using such as your document management system or automated payments!

### 2 Get Paid.

Any office—virtual or not—needs a strong backoffice. While practice management tools are a necessary part of the practice, other tools like automated payments and accounts receivable (such as Headnote or Lawpay) or automated timekeeping (i.e. Smokeball) are also necessary so that you can gain a comprehensive view of the health of the virtual firm.

### 3 Get Help.

One of the great benefits of running a virtual firm is you don't have to maintain a large staff and office space. But you are still going to need some help. Yes, virtual receptionists like Abby Connect or Smith.ai can help answer your phone but they can do a lot more than just this by helping you set up client appointments, returning calls on your behalf, and helping with screening of potential clients. After you sign up all those new clients, the freelance lawyers at LAWCLERK will be ready on-demand to help you conquer your to-do list!

### 4 Get Clients.

Client consultations can be time consuming even for a virtual firm. Save yourself some time by automating as much of this process as you can. Systems like ClientSherpa are great to gather information quickly from potential clients and populate the information to your other systems. Calendaring systems like Calendly and x.ai are great to schedule all those consultations. Once you decide to move forward with a new client use a service like Docusign to send out engagement letters.

### 5 Get Automated.

Once you've signed up a new client, you want to get their work done as quickly and professionally as you can. When you are working with routine forms or documents, taking the time to automate those forms via services like Lawmatics or Zapier can be a huge timesaver. Plus, if you work in a specific practice area there are many practice area specific automation tools like Wealth Counsel for estate planning and Docketwise for immigration.

### 6 Get Advice.

Being in a virtual law firm, you can't necessarily knock on your neighbor's door to ask advice especially, if you need guidance on a form or the latest updates in your practice area. Tools like LexisNexis Practical Guidance or Thompson Reuters' Practical Law can help you in a pinch to access standard documents, checklists, legal updates and how-to-guides in addition to advice from experts in different practice areas. Be sure to check out available resources via your state bar!

### 7 Get Connected.

Even though you are building a virtual practice, it is essential to stay connected. Video is a great way to market yourself and connect with clients. Any marketing expert will tell you that you have to incorporate video with your website and social media marketing. The Virtual Bar Association is a great resource and there are many groups on the various social media platforms to help you connect with other virtual attorneys.