

How to Start & Run a Virtual Law Firm

D.C. Bar Lunch and Learn
Thursday, September 1, 2016





WELCOME

I'm glad you're here...

Our agenda

- Welcome + Introductions
- What is virtual law practice (+ what it's not)
- Some background about me + my law firm
- Ways to incorporate virtual practice into traditional law practices
- Tools - Hardware
- Tools - Software & Applications
- Q & A

Background on Virtual Law Practice

- Not the same as virtual office space
- Delivery of legal services online
- Full service, integrated into traditional service, or document assembly/automation
- Unbundling of legal services



About Me

& My Virtual Law Firm



Ways to incorporate virtual law into your traditional law practice

- Drafting documents/agreements (unbundled services)
- Document assembly (estate planning or business formation)
- Consulting/case strategy; dispute resolution
- Providing templates/DIY resources (software and applications)

Must-have hardware

- Computer/laptop
- Tablet/mobile phone
- Scanner
- Hotspot (for location flexibility)
- Reliable wi-fi
- Quality camera/microphone

Must-have software/apps

- Task management software (Trello, Asana, Basecamp, Teamwork, Lexicata, 17Hats)
- Appointment scheduling/CRM (Vcita, Acuity, Calendly)
- Secure client portal (CLIO, MyCase, Total Attorneys, DirectLaw)
- Video conferencing (Zoom, Skype, Google Hangout)
- Electronic signing (HelloSign, EchoSign, DocuSign)
- Online payments/Invoicing (PayPal, Quickbooks, MyCase, CLIO, LawPay, Xero, Freshbooks)
- Electronic faxing (eFax, myFax, HelloFax)

***See handout for my faves

To learn more

For more training, workshops, and resources go to:

www.beyondthebarinstitute.com

Q & A

