

# **“Moving a Small Firm into the New Technology Age”**

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Agenda Description: It is futile to worry about robot lawyers taking over and impossible to predict the future, but there have been clear trends shaping the practice of law for some time, and now the COVID-19 pandemic that has drastically accelerated some of those trends. Those trends are also opportunities for those who embrace them and adapt to them. In this presentation, Sam will discuss the 8 major trends that have been shaping the practice of law, highlighting those affected by the present pandemic, and the 6 traits lawyers and law firms need to have in order to take advantage of them.

## **I. The modern lawyer is falling behind...**

- a. The current model of the “firm” leaves attorneys trapped...often stuck, overwhelmed, frustrated
  - i. \*National Task Force on Lawyer Well-being says lawyers face higher rates of substance abuse, divorce, depression, and suicide than those in any other profession

## **II. Lawyers can lead to find new solutions**

- a. We can build a better model to provide clients with better services and save our mental/emotional health, while also designing firms that are better businesses
- b. Must identify what isn’t working with traditional law firm model and problems it creates for lawyers and clients
  - i. Some of the problems with the old model...
    - 1. No Time for Leadership
      - a. Getting paid on hourly basis means less time on strategy, systems, technology, accounting, management, pro bono work, creative problem solving, hiring, mentoring
    - 2. Lack of Strategy
      - a. Law school doesn’t teach you how to run a business
    - 3. Unclear and Inefficient Decision-making
    - 4. Lack of Clearly Defined Roles
    - 5. Lack of Client-Centered Services
    - 6. Disengaged Associates
- c. Are we best serving clients under this model?
  - i. We are not working as efficiently under this model as we could for clients

## **III. Technology is changing the legal industry NOW**

- a. People are buying DIY platforms, like LegalZoom

- IV. 8 Major Trends Shaping the Practice of law → Lawyers should embrace these trends, put themselves on the top of the food chain

a. “Meta Trends”

i. TREND #1: Downward pressure on fees

ii. TREND #2: Changed consumer expectations

1. Puts power in the buyer’s hands
2. Clients today are more informed
  - a. Clients can read about prior clients’ experiences, dig into biographies and social media reputations
  - b. As internet has increased access to information, consumers have autonomy to search and find the product, service, etc. that they want
3. Aggregation theory
  - a. Aggregators allow consumers to be connected to providers on free platforms
    - i. Ex: Uber and Netflix

iii. TREND #3: The rise of lawyer alternatives

1. Puts power in the buyer’s hands
2. Web-based alternatives
  - a. Consumers can customize legal documents online for little money. Not the best solution for them, but they can and they do
  - b. Still mainly “forms” services for individuals on a budget
    - i. Easier more convenient route
    - ii. Examples: LegalZoom or simply Google

b. Additional, “Future” trends

i. TREND #4: Demographics

1. Future of law is Younger and Diverse
  - a. More women than men have been graduating from law school for years
  - b. 1/5 of the populations has a disability
  - c. White people will soon no longer make up majority of population

ii. TREND #5: Economic Disruption

1. How ready our business is for a change in economic climate

iii. TREND #6: Climate Change

1. W/ more climate-related disasters, more people need protection from insurance fraud, representation from catastrophic injury, and loss
2. Influence where people live and how they come to work
3. There are trends in remote working to help lawyers adapt to possibly having to work from home more

#### iv. TREND #7: “Employment”

1. Nature of work is changing
  - a. Employees can work remotely with flexible hours
  - b. Progressive forms of compensation
  - c. Life and well-being programs
2. Nature of jobs themselves are changing
  - a. Long-term employment with a single employer is becoming rarer and rarer

#### v. TREND #8: AI

1. AI has vast potential
2. Will assist us in taking shortcuts
  - a. AI can categorize and understand hidden patterns in large data sets
    - i. Ex: LegalZoom uses software algorithms to find marginal optimizations and improvements to its documents
    - ii. So today, a software generated contract is subpar, but in the future that will not be the case
3. Lawyers must apply similar underlying technologies and use algorithms and machine learning to their advantage

### V. With this change, what is the solution?

- a. Demonstrate VALUE to clients
  - i. For example, LegalZoom provides forms for estate planning. An estate planning lawyer’s value cannot be simply be custom-drafting an estate plan...LegalZoom does that and is getting better every day at it.
  - ii. How to demonstrate value against LegalZoom?
    1. Go up-market, create more complicated estate plans for higher price
    2. Build your business around other selling points
    3. Build software-enabled forms or services that learn and improve
- b. Learn to think like an Innovative Business Owner and Adopt the 6 traits below

### VI. Why think of a law firm as a business?

- a. We are a complete organization that has our clients interests, employees interests, and our own personal and financial interests in mind
- b. To think like a business is to take a more client-centered approach
- c. Commitment to solving problems *effectively*

- i. By designing and running a profitable business, we can find new ways to innovate and more solutions that work for people

VII. Let's embrace the Client-Centric Firm of the future...but how?

a. 6 Traits Lawyers in Small Law Firms Need

i. TRAIT #1: Intentional

1. When you start a new firm, you have two options: start firm and hope all details sort themselves out, or intentionally design and create a business that serves you, your clients, and your team
2. As lawyers, we are not prepared in law school on how to build a business that works for our lifestyle, generates money, serves clients with empathy, creates a great work environment for employees
3. There is a better way to go about it – Be intentional in setting up your business, check your assumptions, question authority

ii. TRAIT #2: Entrepreneurial

1. It's a balancing act
  - a. You need to establish rules and procedures to consistently deliver high-quality legal service to clients
  - b. On the other hand, you must be willing to experiment and adapt to future changes

iii. TRAIT #3: Empathetic

1. Data that supports improving the client experience leads to more business, happier clients, and fewer malpractice claims
2. The empathetic law firm is the *client-centric* and *employee-friendly* law firm
  - a. Every system and process must be designed around the people you serve, their needs, and their expectations
3. Representing w/ empathy means...step back and view attorney/client relationship from multiple angles. Be clear on *their* goals.

iv. TRAIT #4: Self-aware

1. To take care of others, you must take care of yourself
2. Recognize the role you need to play in this world without judgment

v. TRAIT #5: Tech-enabled

1. Adopting technology by itself will not get you innovation
  - a. Need to reconsider every aspect of the business, from marketing strategies to client experience

2. When empowered by tech, you can provide more client-centered service
  - a. Firms are driven by understanding their data
    - i. Enables informed decision-making for client and business

vi. TRAIT #6: Adaptable

1. Structure your business in a way that allows you to anticipate coming changes, determine how they impact your business, and respond in a structured and deliberate way

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# DELEGATING TO FREELANCE & VIRTUAL LEGAL ASSISTANTS

## Virtual Legal Assistant-Delegating to Freelancers

You can't do it all alone- even if that's how you started and initially grew your law firm. Over time, your commitment to trying to do everything on your own is actually holding you back! You can't successfully be the VP of every department in your firm, grow revenue, and take the time off that you need. With over 57 million freelancers in the U.S. alone, there's a good chance you can find a virtual legal assistant or other expert to help in your firm.

That's where freelancers like a virtual legal assistant come in. More affordable and with fewer strings attached than employees, independent contractors can power important parts of your law firm, like your marketing and your administrative and intake process. You can even outsource legal work to other freelance attorneys. If you're concerned about cost, you determine what the working relationship with freelancers looks like. Outsourcing to freelancers successfully relies on a systematized process for deciding what to hand off, who to hire, and how to onboard them the right way.

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## How to Determine What to Outsource to a Virtual Legal Assistant

The first place to start is **determining all of the tasks** you're already completing on an ongoing basis. Keep note of all the time you devote to each aspect of your business during a given week either on paper or using a tool like Toggl. If your day-to-day schedule is relatively similar, track all your tasks over the course of one day.

Once you've completed this list, look for the tasks that:

- Don't make you money
- Pull you from your "zone of genius" in talking to clients and practicing law

- You don't do well or find frustrating
- Tasks that you don't enjoy
- Tasks that take you a very long time to complete

There might be several tasks that make sense to outsource together. For example, the same person who builds your intake process might also be appropriate to manage your calendar. Resist the urge to give all the tasks on your list to one person as your virtual legal assistant. It is better to delegate to freelancers who have specific areas of expertise in the areas where you need the most help.

Many tasks can be outsourced by a law firm or attorney that give you that time to work on your business instead of in it while also leveraging your budget. Hiring freelancers means that you only pay for the work completed and don't have to take on some of the overhead that would be required with an employee. Partnering with a virtual legal assistant is a great first step for someone who hasn't outsourced before.

Examples of tasks that you can outsource include social media, blogging, website management, email support, Chatbot management, email newsletter support, and your calendar and scheduling.

## How to Hire the Right Freelancer

**Hiring a great virtual legal assistant** or freelancer relies on excellent job descriptions and instructions. You can only attract quality help when you have a clear system in place for hiring. When outsourcing, it's critical to be clear about expectations, communication methods, and payment guidelines before working together.

Once you know what you want to outsource, it's time to formalize that in a clear job description. Your job description should explain the role and specifics that the virtual legal assistant should know before working with you, including:



- What software they should already be familiar with
- Whether they need to be located in a specific time zone
- How you communicate most effectively to those on your team
- The hours or commitment expected on a weekly or monthly basis
- Both “must haves” and “nice to have” personality traits or working style habits

A system for collecting applications will make it much easier for you to manage than being flooded with emails. It's also the first opportunity to see how your potential freelancers follow directions. Consider using a tool like Google Forms to capture their details so you can review the results. For a role where you'll be working with the person in a client-facing or long-term capacity, interview your top few candidates.

Interviewing your prospective freelancer is your first chance to see how well you communicate with one another. Interview the candidate over the phone or a tool like Zoom to get a better sense of who they are and to allow them to ask you questions. Consider interview questions such as:

- What type of clients do you prefer working with?
- What is your background in the legal industry, if any?
- Tell me about how you set up your work schedule to meet deadlines.
- Tell me about a time when you made a mistake and how you handled that situation.

## Using a Test Job with Freelancers

For long-term projects or roles where the freelancer will be picking up more than five hours per week with you, use a test job to see how well they communicate, meet deadlines, and follow directions. An ideal test job is a small slice of something they'd be working on in the role, if hired. When creating a test job, make sure that it:

- Provides clear instructions and examples of the output expected
- Provides a clear and firm deadline (3-5 business days from the point you assign it.)
- Is relevant to the skillset the freelancer will need the most in the ongoing position

This “screen test” will tell you a lot about what you can expect on an ongoing basis if you hire the freelancer. Using this test job with at least two freelancers will give you the opportunity to compare and to determine who might be the better fit.

## How to Onboard and Train Your New Freelancer

Determine how you'll share important access to your systems with your new freelancer. Tools like Dashlane and Lastpass provide a layer of security and can easily be revoked if the freelancer no longer works with you.

Set aside time to train the freelancer on your systems. Written instructions or screencapture videos both work effectively for an independent contractor. As you work together, involve the freelancer in building out the processes and systems for future reference. Having processes in place prevents confusion and surprises while also letting the freelancer take things off your plate. For ongoing support, set up long-term goals to work effectively with a freelancer; the more they come to know you, your clients, and your firm, the better they'll be able to perform in this role or even be scaled up to support in new ways.

## Paying Your Freelancer

There are three general models to use when setting up payment terms: hourly, project-based, and retainer. Hourly is the easiest to start with if you're not sure how much support you'll need or if the tasks will vary from week to week. Project-based work outlines specific milestones that build up to the bigger project, such as building your website. On a retainer basis, you pay a freelancer for ongoing work like social media or blogging.

Be sure to establish an invoicing system, weekly limits, and collect tax information to send a 1099 to your freelancer at the conclusion of the calendar year.

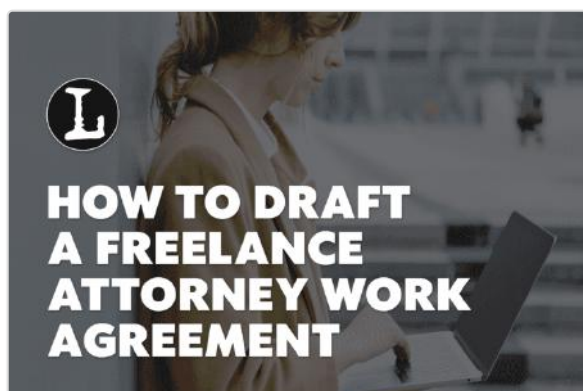
If you're doing too much, now is the time to find your virtual legal assistant to get some of your time back and to scale your firm.

## Learn More About Outsourcing with Lawyerist

Leveraging your time and outsourcing to virtual legal assistants and other freelancers enables you to scale. If you're interested in working in a supportive environment with other small law firms scaling through delegation, think about becoming a **Lawyerist Insider**. Once you join, you'll get immediate access to information, tools, and other lawyers who can network with.

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## Posts About Virtual Legal Assistant-Delegating to Freelancers



### Become a Freelance Attorney

By Laura Briggs on March 23rd, 2020

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# COMPLETE GUIDE TO LAW FIRM FINANCE



## Law Firm Finance

Coronavirus, global economic disruption, and social distancing are causing businesses—small law firms included—to adapt quickly to a new world. You're probably one of them. It's OK. You're not alone.

So, it's more important than ever that your small firm practices smart financial strategies and keeps that cash flow and capital running.

We're here to help.

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## The 2020 Recession

In our book, *The Small Firm Roadmap*, we wrote:

As we write this book in the summer of 2019, the United States is in the midst of the longest recession-free period in our country's history. We have no crystal ball to predict when the next economic downturn will arrive or how severe it will be, but based on 250-year averages, we're way overdue.

If the recession of a decade ago is any guide, an upcoming economic downturn would likely have major effects on clients, law schools, bar associations, legal employment, and our firms. It's worth thinking about how ready each of our businesses is for changes in the economic climate.

We don't mention that prediction from a place of gloating, but because we've known something like this was coming for a long time. We're ready to help small law firms adopt sound financial systems to survive these major disruptions.

So, what can small firms do now to improve their short-term finances? Here are 5 strategies (all covered in more depth in [our book](#) and in our [Lawyerist Lab](#) program). Let's dig in.

## 5 Tips for Improving Your Short-Term Finances

### 1. Monitor Cashflow & Capital Weekly

Create a spreadsheet to track your earned cash on hand (not trust account funds) in your firm's checking and savings accounts and the available balance of any of your firm's credit cards or lines of credit.

Update and review this spreadsheet every Monday morning, first thing, so you can have a sense of your firm's immediate, short-term ability to weather normal expenses and any disruptions that may now be on the horizon.

Better yet, add to this spreadsheet any known new cash that is coming into the firm in the next 4 weeks and any known expenses the firm will be paying in the next 4 weeks and you should have some prospective clarity on any potential cash disruptions coming your way.

## 2. Accelerate Cash Collection & Accounts Receivable

As a general rule, lawyers are reluctant to talk with their clients about fees and are uncomfortable talking with clients about billing and collections.

Now is the time to get past that discomfort and think about client fee discussion as part of your overall client communication and client experience framework. With the current state of the economy, it's more important than ever to do what you can to get paid upfront if you can or to implement systems to reduce receivables and collections.

One way to do this is to email and call clients much sooner in your collections process than you probably already do. We've provided a [template call script in the Lawyerist Insider Library](#) to get you started.

## 3. Pay Your Employees & Yourself

We know that as the legal industry faces disruption from the coronavirus that there will be many attorneys and law firm staff facing layoffs and employment reductions. This is going to be a hard time for a lot of people.

If your firm is in such a crisis that terminations will be required, we sympathize with how hard that must be.

But if your firm isn't in the position of needing to lay people off, make sure you're continuing to pay your people (and yourself) appropriately. This year is going to be stressful and disruptive enough for all of us that we should do everything we can to make sure our teams and our families continue to feel as much stability and security as we can.

## 4. Build Your Cash Reserves & Credit Lines



Now that you're monitoring your cashflow weekly and paying yourself appropriately, make sure—if you're able—that you're keeping enough cash in the firm so it can weather continued disruption in the coming year.

At a minimum, make sure you have at least a full month of firm expenses in earned cash reserves in the firm. Ideally, try to build up to three months or more.

In addition to cash reserves, we strongly suggest that firms also try to have a back-up of an additional one to three months or more in available credit. The goal of available credit is not to use it to pay normal operating expenses or payroll, but to have some short-term flexibility to bridge temporary gaps in your cashflow, should they arise.

## 5. Realign Your Budget

All of a sudden, times have changed. In the face of this new economic climate, take some time to rethink your budget for the rest of this year. Do you have any ability to cut back on unnecessary (and non-growth-producing) expenses? Do you need to rethink your staffing or office lease arrangements? Are there opportunities to invest in new marketing campaigns to tell a different story to clients who are now facing their own disruptions?

Take some time to rebuild your 2020 budget, focused on delivering value to your clients and helping solve their problems (which might be new problems than they were just a little while ago) and on building a strong financial core for your firm for the short- and long-term.

## Long-Term Guide to Small Firm Finances

Running any business—including a law firm—starts with creating a documented long-term financial strategy and profitability model that aligns with your short-term budgets and reports, as well as with your long-term goals. These things are critical to managing your law firm finances the right way. While few law schools teach students how to run a business, knowing how to run a business is critical to running a successful law firm.

In this guide, we'll help you understand law firm finance and how to plan for the future while staying on top of your daily budget. We'll supply you with the tools and direction to develop solid financial best practices, and we'll talk about financial strategy, budgeting, and bookkeeping.

We also have resources on credit card processing, taxes and accounting, and outsourcing your bookkeeping. And we'll nerd out on financial reports, IOLTA accounts, funding your law firm, and time, invoices, and collecting.

**Armed with the tools available to you and an understanding of the importance of using solid financial practices on a daily basis, you'll be prepared to make your law firm a financial success.**

To get started, here are a few best practices you should shoot for when it comes to your law firm's finances:

- You have a documented long-term financial strategy and profitability model that aligns your short-term budgets and reports with your firm's long-term goals.
- You have access to sufficient capital and cash-flows to fund your firm for the foreseeable future.
- You follow written budgets and regularly monitor consistent financial reports and financial key performance indicators.
- Your invoicing, payments, and collections systems are focused on your clients' payment preferences so they will pay their bills on time.
- You pay yourself a consistent market-rate salary, separate from bonuses or distributions, and you are investing an appropriate amount towards savings and retirement.



## Create a Long-Term Financial Strategy

"The Small Firm Roadmap" Official Book Trailer (2019)



As a business owner, you'll need to stay on top of the numbers, forecast your budget, and manage your law firm's cash flow on a daily basis. You'll also need a vision for the future

of your firm, your staff, and yourself. Do you envision a large, multi-lawyer firm that takes on huge cases and clients? Or do you see your firm as a stable solo practice that can comfortably support you and your family? If you have a vision for what your firm will be in the future, you will be more likely to end up there—and you will be much more likely to be happy when you do.

## Get Access to Capital and Cash Flow Funding for Your Firm

Once you have a vision for what your firm will become and a plan for getting there, you will need access to sufficient capital and cash flow. You can finance a law firm with as little as a few thousand dollars, but more capital will give you more runway to make your business profitable.

There are many ways to obtain **law firm funding and financing**, including:

- **Your personal savings.** At least some of your financing should come from your own personal savings. That way, you'll have some skin in the game. You'll be more likely to keep working when things get tough because, well, you'll have more to lose.
- **Loans from friends and family.** A loan from friends or family can come with the added benefit of an interest rate that's below market rate. But, these loans can also come with strings attached and have the potential to create a strain on the relationship if they're not paid back in time. Since each relationship is different, it's important to weigh your comfort level before accepting a loan.
- **Low-rate credit cards.** Having a credit card with a low interest rate can be a great help in the early days of your practice when you need to finance operations before your firm generates enough revenue. It's important to note, however, that this strategy requires great credit and access to interest rates that are truly low. Otherwise, the debt could prevent your firm from growing and becoming profitable.
- **Bank loans.** Bank loans offer lower interest rates than credit cards, but you'll need to jump through more hoops to get them.

- **Startup incubators and accelerators.** Incubators can help new business owners by connecting them with the funding necessary to get going.

## Budgets, Financial Reports, and Financial KPIs

Having a budget is critical to your law firm's financial success. Without a budget, you won't know how much money your law firm will spend in the next week, month, or year. In turn, you won't know how much revenue is necessary to make your law firm profitable.

### How to Get Started Creating a Law Firm Budget

At its most basic, your **law firm budget** is a list of expenses organized by category and broken down into digestible and relevant chunks. You will need to estimate your expenses and the revenue you expect to earn. Doing the math, you'll have a solid idea of how much work you need to take in to make your business profitable.

To help you get started, we've created a **budget spreadsheet** that you can download. Use ours the way it is or let it inspire you to make your own.

## Bookkeeping Basics

Bookkeeping has a tendency to sound scary to lawyers, but it's really easier than you think. Bookkeeping is a reliable system for keeping track of your law firm's financial transactions. The key is to do it regularly. You need to be disciplined. Every time there is a transaction, write it down. Otherwise, you may form bad habits.

Over time, **law firm bookkeeping** that isn't done regularly can snowball or become a mess that's hard to untangle. When the mess involves IOLTA accounts, it can even lead to trouble with your law license.

But if bookkeeping is done well? It can be the single most powerful tool for giving you objective, actionable data about the financial health and well-being of your law firm. It might just be the most empowering habit you'll ever develop for your business.

# Law Firm Financial Statements

Generally, there are four basic financial reports in a complete, standard set of **law firm financial statements**. They are:

- **Income Statement (or Profit & Loss Statement or P&L).** This is the big one. It shows your firm's total income minus your total expenses.
- **Balance Sheet (or Statement of Financial Position).** This one displays the "balance" of your firm's assets and liabilities and all the owners' equity in the business.
- **Statement of Cash Flows.** This statement tells you where your cash comes from and where it goes, and it groups those inflows and outflows into useful line items.
- **Statement of Retained Earnings.** This report helps you understand if you're generating a cash surplus from your operating activities, investing activities and financing activities.

Each of these law firm financial statements can be a source of great insights about your business, although professional guidance is often best to help spot those insights, especially when you're just starting out. For example, many lawyers consider their law firms to be profitable if they can pay all of the firm's bills and the salaries of its lawyers. That's not the only measure of profitability, however. When making your law firm profitable, you need a deeper understanding of your **key performance indicators (KPIs)**, including how much time you're spending on each case and how that compares to the income the case generates.

When you perform a deeper analysis, you'll get a better idea of your law firm's finance picture. You may see that some cases are significantly more profitable than others. You may also see that some cases require you to put in significantly more time compared to the profit they generate, or that some of your lawyers or staff members work much more efficiently than others. These insights can help you make better decisions about which cases to take on and how to structure your firm's work.

# Best Practices in Invoicing, Payment, and Collection Systems

People may tell you many things about invoicing and payment, but it all comes down to this: Running a profitable law firm is significantly easier when your clients pay you. To have that happen, you need to follow some best practices in **invoicing, payment, and collection systems**, including:

- **Track your time regularly, every time, at the same time you do the work.** Otherwise, you may find yourself trying to recreate weeks or even months of billing, and you're likely to forget about a great deal of hard work that you put in.
- **Require retainer fees.** These advance fees give you the peace of mind necessary to work hard and get results for your client, without the risk that the client won't pay. Make retainers mandatory, and track how much of the retainer is spent in every case. When the retainer is spent, make sure the client replenishes the retainer before you continue work.
- **Don't work when you're not getting paid.** Many lawyers make the mistake of continuing to work when a client has stopped paying. Don't bury your head in the case and forget to bill the client or let non-payment slide. It is much easier to prevent a massive unpaid bill from accruing than to successfully collect on it.
- **Get flat fees up front.** If you're opting for flat-fee billing, don't trust that the fee will come after the work is done. Get the fee up front before you put in time on the case.
- **Set billing expectations.** Your clients will be more likely to pay their bills if you meet them where they are. Be flexible with your client's payment needs yet discuss billing agreements and your billing schedule upfront. Setting billing expectations allows clients to stay in control of their finances, too.

## What Should You Pay Yourself and Your Staff?

First things first, don't confuse yourself with your law firm. How much money your law firm takes in is not the same thing as how much money you take home. When running your own firm, you need to **pay yourself a market-rate salary** that depends on your responsibilities. For example, if you're taking cases during the day and then handling marketing and budget balancing late into the night, your salary should reflect all that you do.

Paying yourself a salary regularly, like any other employee, makes your life stable. But it's also a good business practice. It helps you clarify your role and keep accurate data for your accountant when preparing financial reports. It also helps you avoid extra IRS audits that often target business owners who just pay themselves in dividends. And it helps make sure that your business is sustainable.

As for your staff, your compensation system should be fair to existing lawyers and staff while allowing your firm to recruit the highest-quality new lawyers and staff members. You can find a lot of information about market-rate salaries in your area on websites like **Glassdoor** and **LinkedIn**.

When firms are not turning a profit, sometimes the key is cutting staff. Nobody ever wants to do this, but it can be the best way to keep your business on track, taking your firm's long-term financial strategy into account.

## How to Be in Control of Your Law Firm Finances and Future Security

### Insurance Coverage

To be truly in control of your firm's future security, you need to plan for the unexpected. Having the right **law firm insurance coverage** is an important part of that. Some coverage is required, while others are optional. You'll have many options, including:

- Malpractice insurance



- Business Owner's Policy (BOP)
- Commercial umbrella insurance
- Computer and media coverage
- Accounts receivable general business insurance
- Valuable paper and records coverage
- Business auto

Ask other lawyers and business owners in your network about what is working for them, shop around, and then seek the help of a qualified insurance broker.

## Taxes

Taxes can also hit lawyers in unexpected ways. Many lawyers think things are tax deductible that are really not. Moreover, your tax liability may be higher than you anticipated, especially if you are just starting out and running a business for the first time. Working with an experienced CPA is a good idea so that you can plan for your **tax liability** in advance.

A successful law firm considers the numbers first, creating a solid financial plan for the future. What started with a vision should continue with sufficient cash flow, a budget, a detailed billing process, and a market-salary that reflects your hard work. As you move forward, you'll begin to see new opportunities for growth such as new practice areas, team members, and services. Keep making strides forward, creating the profitable law firm you envisioned from the start.

## Learn From the Pros: Become a Lawyerist Insider

It takes a lot of hard work, dedication, and industry know-how to stay on top of the numbers, forecast your budget, and manage your law firm's cash flow. Yet all of this is necessary to grow into a successful business. Luckily, you don't need to reinvent the wheel

to make it happen. As a **Lawyerist Insider**, you'll have access to practice tools, information, and the pros who can help your firm grow.



Law Firm Insurance Coverage



Law Firm Financial Statements



Law Firm Bookkeeping



Law Firm Budgeting





## LAW FIRM ACCOUNTING AND TAXES

Law Firm Accounting & Taxes



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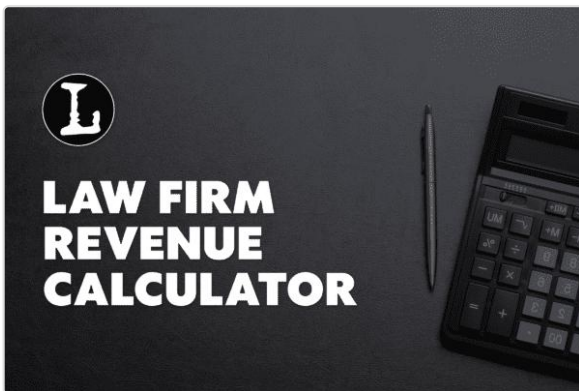


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## Law Firm Ideal Client Personas

Yes: The world has changed. Your ideal client is probably slightly different than they were before the coronavirus pandemic hit. But the sentiment remains: Even now, if you think the best bet for growing your firm is to gather as many clients as humanly possible, no matter who they are, well — consider this:

**Not every potential client is meant to be yours.**

While you might think you need to make a cash grab for any client who will have you right now, take a breath. You can still be discerning in tough times. The age-old rule applies:

quality over quantity.

There are certain individuals out there who will benefit the *most* from your legal services. These are the clients poised and ready to find you, convert and become loyal clients for years to come.

The best way to find and attract the clients you want is to define them yourself by creating an ideal client persona.

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Learn More About Serving Your Ideal Clients: Download Chapter One of The Small Firm Roadmap

## The Importance of Determining Your Ideal Clients

Your legal services are meant for clients with specific problems that only *you* can solve. And these problems might have changed over the past few weeks and months, so it's time to think through two lenses: What evergreen problems do your clients have? And what *new* problems have they developed?

Determining your ideal clients will help you:



- **Connect with your audience more deeply.** Connection is a powerful thing. We especially need connecting *right now*. It's what solidifies your relationship with your clients and makes them believe they chose right when reaching out to you. Your clients are looking to you to lead and help.
- **Build a solid marketing strategy that works.** A marketing strategy will only work when it's targeted at the right audience. How do you find the right audience? You guessed it—by determining your ideal client.
- **Create an exceptional client experience.** Did you know that 80% of consumers are more likely to purchase a service from a brand who provides a **personalized experience**? That's because being seen and known are beautiful things. Offering an exceptional, personalized experience requires understanding your clients on a deeper level.
- **Attract the right clients, instead of the wrong ones.** Many attorneys come to us with concerns about attracting clients they know will be difficult yet taking them on anyway. Being clear about who you *want* to serve will ensure you're clear on who you *don't* want to serve, too. As a result, you'll begin to attract the right clients to your firm.
- **Decide which services to offer.** If you're a new attorney or an attorney starting a new law firm, defining your ideal client will help you decide which services, strategies, and delivery models to offer to serve them best.

## How to Identify Your Ideal Client

To begin defining your ideal client, there are some important steps to take.

1. **Define your services.** First, clearly define what services you want to offer and what unique problems those services solve. This will help you pinpoint those clients who need what you offer the most. We know your services might be a little in flux now during this remote transition. That's OK. Write down what you offer at this moment.
2. **Gather information from your existing clients.** If you're an established firm, you probably already have clients you'd like to see more of. Survey them and ask why they

chose you above your competitors. Take note of their demographics, fears, needs, and more. Ask them what help looks like right now.

3. **Look into who's finding you online.** Review your website's **analytics** to see who's finding you online. Where are your online visitors coming from? What keywords and phrases are they using to find you? What are clients searching for now during this particular period of time?
4. **Check out your competitors.** Who are your direct competitors serving? Although you can't see their analytics or speak directly to their clients, you can see who they're trying to target online.

## What Is a Client Persona?

Once you have some background information about your ideal client, the next step is to build a client persona. A persona, also known as an avatar, is a written profile that accurately depicts your target client. They're a detailed description of what makes your ideal client tick.

Law firm client personas help you in many ways. They guide your marketing efforts, the **client experience**, and more. They ensure your team is on the same page when it comes to understanding who you serve. Personas ensure you're working to attract the clients you want to serve instead of those you don't.

## How to Create a Client Persona

Your client persona should be located somewhere your team can have quick access to it. We recommend using a Word document, a spreadsheet or if you want to get fancy, a visual. Next, start building your persona:

1. **Give your persona a name.** Yes, a real name. Your persona is a living, breathing representation of who you serve. To make it as personal as possible, name your persona.



2. **List their defining demographics.** Next, list the demographics that define them such as their age, where they live, their occupation, and so on.
3. **Identify their pain points.** The most important service you can offer is one that eliminates your client's pain points. Record these pain points in your persona and how you plan to solve them.
4. **Identify their goals.** What will life look like for your persona after they work with you? For example, will they exit their marriage with confidence or continue to grow their business securely with your advice?

When creating your persona, the more specific you can be, the better. To dive even deeper, ask yourself these questions about your ideal client:

- What's the single most valuable thing a lawyer could provide for them right now?
- What worries keep them up at night?
- What are their hobbies?
- How much money do they make?
- Who do they follow on social media?
- Do they have kids?
- What does their daily routine look like?
- Which influencers do they follow?
- What news outlets do they turn to?
- What might be getting in the way of them seeking help?

It is often helpful to think of actual people you know who would fit this persona. For instance, if you have already had clients, who were your favorites? What made them stand out? What other details about them should you record? Also, consider the clients that

didn't work out well. What about those situations that made your job difficult or made it impossible for you to deliver what your clients needed?

## Don't Accidentally Exclude Demographics

As you create your persona, be careful to avoid accidentally excluding the demographics of those you want to attract. Double-check your persona for biases as you move forward. This means making sure you're thinking more about your ideal client's needs and only using demographics to support your persona.

## Do Your Research

If there's one thing to gather from this guide, it's this: don't wing it. You must put some elbow grease into developing your persona. Do your online research and get out and talk to people. Look at NextDoor and Facebook groups to research and talk to your ideal clientele.

The more information you can gather, the better and more comprehensive your persona will be.

## Use Our Ideal Client Worksheet

If you need some extra guidance, we've put together an easy-to-follow ideal client worksheet you can use to define your persona. [Download the ideal client worksheet now and get started.](#)

## Thoughts on Creating Multiple Ideal Client Personas

You may already be considering creating more than one persona for your firm. Perhaps this is because you have more than one practice area (e.g., family law and estate planning). Or perhaps it's because you serve two very different audiences within one area of law (e.g., landlords and tenants).

Before you move forward with multiple ideal client personas, we recommend first getting really good at working with only one persona. Work through the process of defining one

persona and then use that persona to move forward, as we outline in the sections below.

If, and only if, you begin to truly connect with your first ideal client persona should you consider creating more.

## How to Use Law Firm Client Personas in Strategy, Service, and Marketing

Your new ideal client persona is like a compass you can use to guide your strategy, client service, and marketing. With every new initiative you start and every decision you make, refer back to your persona.

### Finding and Attracting Your Law Firm Client Persona

How do you find and attract your ideal client persona? Chances are, you've done enough research to know where your ideal clients hang out online and offline. Now, all that's left to do is show up.

#### Advertising and Online Content

The best way to show up in front of your ideal client is through **law firm marketing**. For example, place an ad in a publication your ideal client likes to read. Or, participate in the social media platforms they like to scroll through.

The next step is to create content (blogs, ads, website copy, social media posts, etc.) that speaks directly to your ideal client. Use your persona to speak to your client's pain points and how you can alleviate them. Speak to their goals, their dreams, their fears. Tailor your message to your ideal client and they will come. Be a resource.

### Your Ideal Client Persona and the Client Experience

Around 84% of companies that work to improve their **customer experience** report an increase in their revenue. Why? Consumers crave experiences that make them feel special and safe. Your clients are no exception.

Knowing who your customers are and what they expect is the first step in creating an unforgettable experience. And guess what? You're already halfway there with your client persona. Using your persona, you can improve the experience you offer through personalization. For example:

- Does your ideal client prefer email communication or phone calls?
- Do they like paper forms or do they prefer using electronic forms?
- Will they benefit from new payment systems such as subscriptions or flat-fee pricing?

## Your Ideal Client Persona and Your Law Firm Strategy

Your ideal client persona will also directly affect your **law firm's strategy**. In fact, your business plan should center around serving them to the best of your ability.

### The Ideal Client Journey

Your law firm's strategy is built around your mission, vision, and values. It's also dependent on your clients and their journey to and through your firm. You must have a documented ideal client journey to properly steer your ship.

This journey will differ depending on your ideal client persona. The journey begins when they first see a legal problem on the horizon and continues through identifying potential solutions, selecting a solution, and experiencing the process of having their issue resolved.

For each stage of this journey, determine where your clients get their information, what they're looking for, and how you can deliver. With persona in hand, you can map each stage of the client journey (awareness, evaluation, conversion, onboarding, service, and loyalty) to your ideal client's specific needs.

## Define Who You Serve to Guide Your Firm Toward Success

As a new attorney or a lawyer ready to start your own firm, it's easy to fall into the trap of taking on any and every client that comes through your door. Yet, we know that when you define and work to attract only your ideal clients, you'll start to guide your firm toward true success. Plus, you'll be much more content in your work.

## Learn More About Serving Your Ideal Clients: Download Chapter One of *The Small Firm Roadmap*

Defining your ideal client is a great first step toward building a successful law firm. Our new book, *The Small Firm Roadmap*, will teach you the strategies you need to serve your clients in the best way and keep growing your firm. Download the first chapter for free today.

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# LAWYER MENTAL HEALTH & SUBSTANCE ABUSE

## Lawyer Mental Health & Substance Abuse

You're reading this because you're an attorney and you're **freaking out**. You're not alone. No joke. We're *all* in different stages of freak-out right now and we want to help. First, take a breath. A real one. Inhale seven seconds. Hold it for three. Exhale eight seconds. Do it again. And then do it again.

At Lawyerist, we've always known mental health needs to be at top of mind for attorneys. We've worked with mental health and substance abuse experts for years to get attorneys the tools they need to live healthy and sober.

So let's dig into those tools.

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## What if You're New to Thinking About Your Mental Health?

We bet you know what it feels like to be anxious before a big case or to dread a problem client. But this might be the first time you're feeling truly overwhelmed – about the world (which you can't control), your life (which you can somewhat control) and your business (somewhere in between).

See if this sounds familiar:

- You feel surreal. Everything feels dreamy or cinematic — is this all really happening?

- You have tight shoulders and notice you're holding your breath.
- Your mind is racing, trying to make 875 plans at once.
- You're mainlining caffeine — or other substances.
- You're just plain scared. And it's fear you've never felt before.

Congrats! You're having a normal reaction to an abnormal situation. In fact, this is a traumatic situation. ([Listen to our podcast with trauma expert, Sherry Walling.](#)) You probably haven't experienced a worldwide pandemic before. You have no emotional blueprints on how to deal with this. As one of our Labsters said, it's like every city in the world got hit by a hurricane at the same time.

So, you're not going crazy. You're not losing your mind. Your brain is reacting as it should to enormously stressful circumstances. You're OK.

But what this means is that you need to make a plan to take care of yourself. Think about it: if you aren't taking care of yourself, you can't take care of your **clients**. Or your family. It's that old rule – put your oxygen mask on first.

You *can* do this. And you will survive this. Read on.

## And What if You're an Old Pro?

We want to sidebar with our community members who have spent their lives thinking about their mental health. You've dealt with depression, anxiety, ADHD, panic attacks — insert your issue here — for years. You've seen therapists. You've read books. You've meditated. You've exercised. You've done all the things.

What makes you special during this particularly wrought time is that you might be having some surprising reactions. See if this sounds familiar to you:



- You actually feel...calm. Like your brain has been preparing you for an outside crisis like this your whole life.
- Or you feel extra ramped up. This crisis is triggering all your worst fears.
- You're worried about leaning on crutches – alcohol, drugs, meds, your support group.
- Or you're in Take Care mode. You're furiously helping everyone else to avoid thinking about yourself.
- You're cut off from your usual coping strategies – in-person therapy, exercise, you name it.

We're going to tell you what we told the other folks up there: this is still a normal reaction to an abnormal situation. Keep repeating that. You will not go crazier. You will not get worse. You may *feel* like your symptoms are increasing — because they are! But you're not going to lose your mind or be unable to take care of yourself or your family.

You already know how to cope. It's just a matter of reminding yourself of those strategies and pivoting them a little.

Let's look at what those strategies are.

## 7 Tips to Help You Through Your Day

### Change Your Productivity

Your **productivity** has changed. Accept this now. As attorneys, you've worked through crises before – family issues, bad health, you name it – but you've never worked through one like this. You cannot keep the same level of productivity you're used to.

This *doesn't* mean your work will suffer. What this means is that you need to reconsider *how* you work. Your systems and lists are more important than ever. We've always believed your productivity hinges on your mental health.

- **Reprioritize.** Each day, pick three things that need to get done. Now isn't the time for your Would Be Nice list. Put out the fires first and put your limited energy towards the most important tasks.
- **Plan for the future.** But this doesn't mean you're living moment to moment. Spend some time sketching out possible futures. (And don't freak yourself out in the meantime.) What happens if this world stays this way 6 months from now? 1 year? 2 years? Write down steps you need to take to insure your future.
- **Schedule breaks.** We've always told you this, but now we're really telling you: Schedule breaks. Every day. Your brain isn't functioning the same. You need several, restorative breaks on the calendar every single day to get away from work, reset, and clear your head.

## Seriously, Get Outside

Outside is liquid gold right now. You might've been an outdoors person before this hit or maybe you were your family's resident vampire. Regardless, outside is an elixir. It's going to restore you in a way you didn't know was possible.

- **Take it easy.** Even if you're a marathon runner, use your outside time for restoration — not breaking records. Take a slow, meditative walk in the sunshine. Stay away from crowded areas. Listen to music you love. Clear your head.
- **Learn birds.** OK, hear us out: you will find incredible comfort knowing the birds are business as usual. They're oblivious to our chaos. Learn a couple of your neighborhood birds and make a game out of finding them.
- **Plant.** You don't need a yard for this. Get some seeds and start planting. Start with the easy stuff – easy-to-grow flowers, lettuce, root vegetables. Seeding and seeing your labor grow is magic.

## Schedule Quiet Time

This is where a lot of lists will recommend meditation and we *do* recommend meditation. Even people who think they can't possibly sit still for more than a few minutes should try it. But above all, schedule quiet time alone. With spouses and kids at home and clients calling, this may feel impossible. But even a few minutes will help you.

- **Put your quiet time on the calendar.** In an ideal world, an hour would be perfect. But we know that's not always possible. Regardless of how long, schedule this time on your calendar and let your family know. And then go to a quiet place — even if it's the bathroom — and sit in sweet silence. Practice **gratitude**.
- **Play the 5 things game.** To distract your brain from ruminating during your quiet time, play 5 things. Ask yourself: What 5 things can I hear right now? What 5 blue things do I see? What 5 smells do I notice? What 5 fruits can I think of? Etc. Give your tired brain a game.
- **Stay off your phone.** Put your phone down during this scheduled time. Just ignore it. There's nothing you need to do during this time except just sit in quiet. Seriously. Everything will wait.

## Keep a Schedule

Happy brains love a routine. And your routine is upside down right now. Refocus. Take time to get your new work and home routine on paper.

- **Make several options.** On tougher mental health days, you need a tighter schedule. This might mean scheduling out every 30-minute – or 15-minute – period of your day until bedtime. Sounds extreme, but it will calm you to have tasks to review. For better days, stick to hourly.
- **Schedule your weekends.** If you're like some of us, you love your leisurely no-schedule weekend time. And you can still have that time — eventually. But for now, schedule your weekends, too. This keeps your brain from spinning during unstructured time.

- **Be flexible.** As attorneys, we're a little type-A. We set a schedule and beat ourselves up if we don't follow it. A schedule is a coping tool — it's not set in stone. Use it to help, not punish.

## Find a Hobby

We know a lot of lawyers don't have hobbies. Your work is their hobby. You You need something — not work — that will keep your hands and brain occupied for long periods of time. This can be knitting, video games, puzzles, cooking, or crosswords. Try something that takes your full attention.

- **Use your competitive spirit.** We mean, you're a lawyer. You're probably competitive. Use this drive (within reason!) for your hobby. Set your goals for yourself. Learn two new dishes to cook in the next month. Finish each day's crossword. Give yourself something to work towards.
- **Learn something new.** Duh, but really: whether it's a new language, software, or the mysteries of the universe, give your brain something new to chew on. You'll feel happier and less helpless.
- **Keep the hobby away from work.** By this, we mean pick a hobby that has nothing to do with being a lawyer. Don't take this time to learn the history of Elizabethan law. Learn how to latch hook a rug instead.

## Take Advantage of Online Therapy

Whether you're a therapy veteran or you've never considered therapy, now's the time to do it. You *will* have shit you need to process. And you want to process it before you take it out your stress on your family, colleagues — or worse — clients. This is the time to get a neutral party on your side.

- **Get over your assumptions about therapy.** If therapy is new to you, you might have some stereotypes floating around. It's for crazy people. It makes me weak. My family

can support me – I don't need therapy. None of this is true. Therapy is for everyone and it makes you stronger.

- **Journal.** To make the most of the time, brain dump on a page before a session. You'll be able to extract your pressing issues so you can make the most of the time.
- **Don't be afraid to therapist shop.** Therapy might be hard at first and make you feel uncomfortable. But don't stick with a therapist you're not clicking with. They're professionals and they'll understand if you need to switch.

## HALT

There's an old Alcoholics Anonymous saying: you're most in danger of slipping when you're too hungry, angry, lonely, or tired (HALT). The same applies to mental health. Keeping an eye on these emotions is a fast way to keep yourself in check.

- **Stay connected.** Hanging with friends or family is different now, but in some ways — it's easier. If you're lonely, send a quick text. Set up a video call so you can see a face. Reach out in the way that makes the most sense to you. But reach out.
- **Sleep.** Nothing will rot your brain faster than no sleep. As attorneys, we're used to working through the night, but now isn't the time to prove you can do this. You're extra stressed. Get as much rest as you can. Make it an absolute priority.
- **Schedule your meals.** Remember we when said you should keep a schedule? Schedule your meals, too. Write down what you'll eat and what time you'll eat it. Stick to it, even if you aren't hungry. Keep your blood sugar even.

## 5 Resources to Use Right Now

Here are a few resources we found helpful.

**MoodPath**

Tracking your daily moods is a good way to catch a decline before it starts. We love metrics here and this app does it well. MoodPath asks you questions to assess your mood three times a day, then tracks how you're feeling.

## **Youper**

Youper is an AI therapist. And it's incredibly effective. In a texting format, the app conversationally asks you how you're feeling and digs into why you're having those feelings. It also offers meditations, breathing exercises, and gentle sleep music.

## **Talkspace**

Talkspace has been in the online therapy game long before this crisis began and they do it exceptionally well. Easy to use, fast to respond.

## **Online Zoo Cams**

For your moment of zen, most zoos around the US are offering live cams. We like the San Diego Zoo cam, but your local zoo probably offers it, too. Watch the penguins. They'll save your soul.

## **Suicide Hotline**

Listen: you don't have to be suicidal to talk to the suicide hotline. But if you're feeling low, lonely, or on the edge, you should call them. You can also text. The volunteers at the hotline are kind, empathetic, and will immediately help you.

# **Substance Abuse and Lawyers**

**Mental health and substance abuse are inevitable bedfellows.** One informs the other on every level. Whether you're in recovery or curious about it, a crisis will reveal your pain points.

Nearly 21% of attorneys are problem drinkers and almost 9% are drug users. We're more susceptible to substance abuse than other jobs because the work is long, high pressure, and the stakes are high.

So it's not surprising you might be struggling. We've talked to our community members for years about substance abuse. We've always believed it's important to be transparent and truthful about the effects of use on our industry.

## What if You're Not Sure if You Have a Problem?

Most people aren't sure. You're not alone. There's a media stereotype of the fall-down drunk who can't keep a job, racks up DUIs, and ends up homeless. Maybe some of your family members or even clients fit this stereotype.

The reality is most substance abuse doesn't look like this. You might be killing it at your job. You probably don't have legal troubles. You can likely drink or use the night before and get up at 6am without issue.

But if you've started having a nagging thought that you *might* need to cut down, listen to your gut. Some addiction experts say that having the thought at all is evidence you have a problem.

But let's look:

- You've stopped using before, but you've never been able to stop completely.
- You bargain with yourself. "I'll only have three beers tonight, but then zero tomorrow."
- You've lied to your family or friends about how much you drink or use.
- You kind of feel like shit. Just a little bit. All the time.
- You feel low-level anxious all the time — and you reach for your substance to calm your nerves.

This isn't a complete list. It's a guideline. Substance abuse is personal *to you*. Your standards are yours — and your rock bottom is yours.

For example, one of our team members is an alcoholic. She excelled at work. She exercised. She never missed an appointment or woke up late. And she was only drinking 3-4x a week. Couldn't possibly be an alcoholic, right? One day, she drank enough to pass out and missed an important phone call. She wouldn't have missed this call had she not been drinking.

And that was her wake up call to get help. It might be something as small as that.

We'll walk you through some steps to figure this out.

## What if You're Already in Recovery?

We want to talk to our attorneys already in recovery. First: congratulations. We know firsthand how hard it is to reduce or stop using. This is a battle you fought and won — and it can never be taken away from you.

But this pandemic is a different battle and it's going to trigger your cravings. How could it not? It hits so many fears: feeling out of control, helplessness, a chaotic outside world. These are the things we tried to escape by using in peaceful times.

Pay attention to these feelings.

- Your anxiety is creeping up. You might not be thinking of using yet, but you know it's coming.
- Your friends and family are drinking more and using more. It's harder to avoid triggers.
- You're cut off from your support: in-person meetings, your sponsor, or other coping strategies.



- You're starting to bargain again. "Coronavirus doesn't count — I could use right now when things are tough and stop later."
- You're (literally) dreaming about using.

Again, not a complete list, but you're a veteran. You probably know what your relapse triggers are. The point is: You must be more vigilant than ever. This is an unprecedented time.

But you *can* do this.

## 5 Tips to Help You Reduce or Stop Using

### Make Lists

Whether you're new to considering reduction or you've been through treatment, making lists you can review as you go through the process is crucial. Don't let these thoughts run off-leash in your head. You'll just get more anxious.

- **Create a Use Matrix.** Grab a sheet of paper. Make four connected boxes. Label the boxes: Advantages of Using, Disadvantages of Using, Advantages of Quitting, Disadvantages of Quitting. Then fill in the blanks. Review this list each day.
- **Track your use.** When we drink or use too much, we don't *want* to track. Tracking makes it real. So you often don't know exactly how or when you're using. Write down each time you use or drink, what happened right before you did, and what you were feeling. If you're sober, track each time you crave.
- **Journal, journal, journal.** Substance abuse isn't about the substance. Sure, you might genuinely love a peaty Scotch or the taste of a tart red wine — but if you're overusing, you're not doing it for the taste. You're doing it because you're having emotions and thoughts you want to suppress. Brain dump every single morning, furiously. Don't judge yourself.

## Get Support

Alcoholics Anonymous isn't for everyone and it isn't your only option. It *can* be helpful — it's the original model and they know their stuff. If AA sounds right to you, use it. But some people shun AA because they don't like the religious aspect or it feels cult-ish or too rah-rah. But you can't white knuckle substance use alone.

As attorneys, we're used to self-sufficiency. We don't ask for help. But you're going to break this pattern.

- **Join an online group.** You can't meet people in person right now, but there are **online support groups** that have been running this way for years. They have messageboard or video meetings. You'll feel a *huge* sense of relief knowing you aren't alone.
- **Get an accountability buddy.** Your family and some of your friends might not understand your journey here. That's OK. Not everyone will — or is meant to. But you can probably think of one person who's going through this. Maybe they made a Facebook post about quitting drinking or a passing comment in a meeting. Connect with them. Check in daily.
- **Lurk on message boards and listen to podcasts.** Even if you don't post, there are boards where people are sharing their stories. Just scrolling through other people's recovery wins, struggles, and routines will give you inspiration for your own. (Or join a coaching group, like **Lab**. You'll find plenty of our community members in your shoes.)

## Take It Slow

Some experts say you need to stop your substance completely to be successful. And that might be true for some of you. This is your journey and you'll figure it out.

Others believe **moderation** is a more realistic path. You might start with slowly reducing, then realize you need to stop altogether. There are no rules here except to get healthy and

stay healthy. (If you're already sober, you've probably figured out your route — so let this be a reminder.)

- **Learn the difference between a relapse and slip.** Once you've set a reduction or stopping goal, don't punish yourself if you slip. A slip is just that — and not an excuse or a reason to devolve into a full relapse. If you decided you want to cut down your drinking two 3x a week and you do 4x this week, just get back on track. A slip is not a relapse.
- **Give yourself realistic goals.** As attorneys, we set challenging goals. We're successful because we do this. But when it comes to cutting back habits, you want to start slow. Don't try to run 6 miles a week and stop drinking and quit eating sugar. If you're going to reduce your substance, make that your only personal goal for a while.
- **Delay.** If you want to use, set a timer for 20 minutes. Clean your kitchen, go for a walk, play a game on your phone, whatever. After the timer goes off, see if you still want to use. Then set another timer. And repeat.

**Note:** If you're a heavy drinker or user, don't stop abruptly or by yourself. This is dangerous and you'll end up in a bad place. Fight through your embarrassment or shame and **call a treatment center** to get guidance. This doesn't mean you're going to get forced into treatment. Counselors answer calls like this every single day and they're there for you.

## Find Replacements

Let's be real: nothing will replace the (artificial) high of drinking or drugs. But it's just that — artificial. It's not real and you can't find an exact match in real life.

But you *can* find close substitutes.

- **Drink fizzy water.** No joke, drinkers find themselves switching to La Croix. Sounds silly, but this seems to be the universal substitute for a cold beer or a cocktail. Buy a

case or two and drink them during your usual using times — dinner, after work, whenever you'd usually treat yourself.

- **Find your other-escape.** You cannot emulate the initial relaxation and escape alcohol and drugs give you. You never will and it's best to accept that now. And you wouldn't want to emulate the hangover and the shame that *also* come with using. So, make a list of things that make you feel relaxed, connected, and most like yourself. It might be hard at first. Try more than once.
- **Seek other friends.** Not everyone is a social drinker or user, but if you are, your drinking/using buddies are an important part of your life. Here's a hard truth: you can't stop or reduce and hang with the people who keep using. At least, not at the beginning of your journey. So, take this time to make a list of people who don't use. Who are the people in your life who will encourage and support your new goals?

## Play the Tape Forward

Treatment counselors will tell you to scare yourself. This is different from punishing or shaming. In fact, shame is a user's worst fuel. Shame is useless in this situation.

But you *do* want to understand what the future looks like if you keep using at the same pace. Or, if you're sober, what the future looks like if you relapse.

- **Write out your possible paths.** If you're at the point where you're worried about your use, imagine what your future looks like if you don't quit or reduce. If you don't take the right steps, you'll need more and more of your substance to feel good. So, grab a notebook, and write down what 6 months, a year, 2 years look like for your career, your family, your health.
- **Figure out your status quo.** But not every future is cinematically bad. What happens if you keep using as you are now? What does life look like? What goals won't you achieve? How will you feel? How will your family feel? Your colleagues? Your clients?
- **Sketch a happy future.** No one knows the future. But your previous future plans might look different now. You cannot control coronavirus or your government. But you

can control your day-to-day future. What's your happiest future look like now, in our new virus reality? How does your use fit in?

## 5 Resources to Look Into Today

Here are a few resources we found helpful.

### The Naked Mind

Annie Grace has two books, a podcast, and resources on cutting down drinking. You can sign up for her 30-day program (for free) right now. Also, [check out this interview we hosted with Annie](#).

### SMART Online Recovery

SMART has been hosting online meetings through message boards, chat, and video for years. They're a warm, agnostic, abstinence-based support group for all addictions.

### Reddit Recovery Groups

Reddit has a reputation for being a strange place to hang out, but it's *wonderful* for finding a variety of recovery groups. There's a ton out there — and you don't have to post. You can scroll through for advice, empathy, and support.

### ABA: Lawyers Helping Lawyers

The ABA is committed to removing the stigma around substance use. They've put together a commission providing confidential support.

### The Library

Now is the time to get familiar with checking out e-books from your library. In fact, there's an app called [Libby](#) that makes this easy. Treat your commitment to reducing or stopping

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# REMOTE WORK & VIRTUAL LAW FIRMS

## Remote Work & Virtual Law Firms

Is your team set up to go and stay remote? Do you know what you need to do to make sure that you have the right tools, processes, and people to run a thriving remote law firm? The good news is that you probably already have some of the things you'll need to transition to a virtual law firm and that you can adapt to this method as many other lawyers already have. Your firm has the potential to function very well with the right tech, the right people, and the right policies and processes.

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## Determining Tools and Home Office Needs for Your Virtual Law Firm

Before going completely virtual, you need to take an **inventory of the tools** you already have and those that you need. You might need to make some investments and prepare your team for how to use these tools before sending them off to their home office.

### Challenges:

- Collaboration & communication
- Security
- Accountability & tasks

### Solutions:

- Put the right tools & processes in place (Practice Management, Document Sharing, Chat, Video Conferencing, etc). Determine what tools to use when. For example, Slack for daily communication and text for urgent communication. Provide training for your team(Visual through Loom and written through Doc Sharing).
- Review current security policies. Are there additional security measures that need to be implemented?

- Make a list of what happens in the office and when. Then, prioritize the list. Determine who does what and how to keep track of the priorities.

## Videoconferencing Software

Video meetings are essential for a well-functioning workplace in your virtual law firm. In order to be effective, video meetings must also be easy and reliable so that you can use it as the default for every meeting. Don't forget to consider whether each employee has the tech to use a video meeting, such as a company-provided laptop or computer, webcams, and microphones/headsets.

Make sure you pick one video software to use companywide. There are many options, but if you don't have a preference Google Meets or Zoom work well. Google Meets is the most convenient for computer users because it runs in a browser. Zoom is the best, however, for tablet and phone users even though it requires installing an app.

Prepare your staff for how to use this technology the right way so your virtual law firm is ready to go from day one. Built-in computer cameras can work if the camera can be elevated to eye level. A great first webcam for business use is the C920S HD Pro.

Set up guidelines for how staff will show up to meetings. Remind staff to turn their video on and that they shouldn't use their computer's microphone and speakers. Wireless headphones can have battery life issues, but plug-in headphones with a microphone are an affordable option to reduce feedback.

Make sure you've got the tech to get through a client meeting without issues- you won't look very professional if you don't have headphones at all or if they die halfway through a meeting.

## Client File Storage

We've been telling you to go paperless for years, but now it's more important than ever to go **paperless** and to do it safely. Your law firm needs a single source of client information



and files. In order to work remotely, you have to be paperless. You should have a scanner just in case (we recommend the [ScanSnap iX 1500](#)), your goal should be to eliminate as much paper as possible. Your client file storage, just like everything else in your virtual law firm, should be [secure](#).

## Proper Home Office Bandwidth

Make sure you have enough bandwidth in your home internet to accommodate your increased usage as a virtual law firm. Your bare minimum should be at least 1.5mbps up/down. If your partner or children are also using the internet, that impacts your speed and usage, too. You can check your bandwidth at [www.speedtest.net](http://www.speedtest.net) to make sure you are getting what the provider promised and to determine if you need to upgrade.

Please review our [Remote Law Office Technology Stack](#) page for more specifics to set up your virtual law firm.

## A Professional Home Office Setup

Even though you're at home, you must put your most professional foot forward with your lighting, background, and display on a webcam. Sadly, we see too many examples of people ignoring just how important this is. You want to project an image of polished competence and business as usual with your remote law firm, not haggard working-from-home-because-I-have-to stress.

Make a plan for what you will need and create a workspace you will actually want to be in. Keep all your work in that area so you will be able to find things easier and be more productive while presenting a professional image for your virtual law firm. Find a way to create privacy using divider walls or bookshelves. Make it personal by bringing in greenery, pictures, or any small touches to make the space your own.

Make sure your camera is set up so the strongest light is behind the camera and pointed at your face. A window is ideal in the daytime. Otherwise, buy a light and point it at your face. Frame it so that the center of your face is above the center of the frame. As long as

your head is not cut off, it's far better to look "tall" in the frame. When you're testing this out, see what's behind you on camera. Arrange the background to look professional. You can also use virtual backgrounds in Zoom, which look best if your face is already well lit.

Every member of your team should be clear about the expectations with their home office and virtual appearance on webcam, too. Consider clothing options that project a professional look when meeting with clients and referral partners.

## Developing Processes for a Remote Firm

Now that you've analyzed or secured the technology and systems you need to function remotely, it's time to build out the **processes** for your team to follow. You must have a solid practice management software in place before going remote. Without a streamlined system and a method to teach that to your employees and contractors, you'll spend most of the day in the weeds trying to find things.

If anything, you should be prepared to communicate more, especially at the beginning of your remote transition or when you onboard a new remote team member. Keeping your team connected makes for better accomplishment of projects and goals, but also helps to limit isolation.

## Developing a Remote Company Culture

What does working remotely look like for your firm? Create and implement systems for when people are expected to be online, how teams communicate and assign tasks, and decide if any of your current policies need to be updated for a remote workplace.

There are plenty of people who are fully capable of working successfully in a remote home office- you just have to know how to attract them and clearly set expectations. Letting your current and future employees know what to expect and putting extra effort into getting them set up, especially if this is their first remote job, is key.

So how do you build and maintain culture in a remote company?

- Communicate your core values and mission frequently and in a variety of ways. Tell your story. Share your vision. Ask the team to share their favorite core values. Be creative.
- Create a Communication Toolkit that reflects your company culture. What communications tools do you use and when?
- Create best practices for using the tools(Chat, Videoconferencing, Etc)
- Meetings-Remember to keep it human, set aside time for “personal” chat Set a schedule for daily, weekly, monthly meetings(In-person meetups and online)
- Establish rituals (Weekly lunch, monthly happy hours, annual retreats)
- Build a virtual community

## Learn More About Going Remote with Lawyerist

Becoming a remote law firm begins when you have a clear plan, the right tools, and a method for training and staying connected to staff. If you’re interested in joining other forward-thinking attorneys like you, consider becoming a **Lawyerist Insider**. When you join, you’ll get access to tools, information and other attorneys who can help you adapt and grow your firm. We’re all in this together.

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## Posts About Remote Work & Virtual Law Firms

### Every Legal App For Android

By Lisa Needham on August 6th, 2015

### Every Legal App for iPhone and iPad

By Lisa Needham on July 30th, 2015

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your use like you're taking a college course. [Read, read, read.](#)

## Stay Sane and Keep Your Law Firm Afloat

While you're thinking about your mental health and substance use, you're probably *also* wondering how you can keep your firm afloat during this crisis. You're not alone — almost all of our attorneys are feeling the same crunch. We've put together a 30-day program called Pivot to help you stay sane as you switch to remote, get your finances recession-ready, and help your struggling clients. [Learn more here.](#)

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## Posts About Lawyer Mental Health & Substance Abuse



### How to Recognize and Prevent Lawyer Burnout

By Kate Mangan on August 1st, 2019

### The Real State of Substance Abuse Among Lawyers

By Kate Mangan on March 9th, 2016

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