

Special Report

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SPECIAL REPORT

Pandemic Response-Plan For Small Law Firms

**“Working Remote & Keeping Your Law Firm
Thriving Without Losing Your Mind”**

What to do now that it’s too late
to do what you knew you should have done
then.

“We have no time for regrets or recriminations right now.

We may still come out of this smelling like a rose!”

~ RJon Robins

Relevance: [rel-uh-vuh ns] **noun**

the condition of being relevant, or connected with the matter at hand.

RELEVANT [REL-UH-VUHNT] **ADJECTIVE**

bearing upon or connected with the matter in hand; pertinent.

Above & beyond all-else this Special Report series is meant to be relevant to the owner or professional legal administrator of a solo or small law firm.

Relevance in the context of a fast-growing, ever-changing small law firm means actionable. You need something you can use. It must solve an immediate problem your law firm is facing, now.

Each Special Report in this series contains immediately-actionable information, tools, checklists, sample scripts for tough but needed today conversations and other resources.

“No Fluff. No untested theories. There will be time to analyze, review and improve how we do what we do. But now is not the time for advice or ideas about what anyone would have, could have and now obviously should have done before”. Those were the orders handed down by the Founder of How To Manage A Small Law Firm with regard to this Special Report Series.

Visit www.LawFirmPandemicGrowthResources.com to see a list of completely-complimentary special reports (written, audio and videos) and help yourself, so you can help yourself!

Executive Summary

The very first thing the owner(s) and management of a small law firm must get crystal clear about is that the key to a law firm thriving (or even just surviving) during a pandemic is 100% entirely based on how well its clients fare.

Once the pandemic happens, it's already too late for the owner(s) and management of the firm to think about all the things they now wish they had done to better prepare.

Instead, now is the time for action! And all actions must be based on one singular criteria:

What Is Best For The Clients Of The Law Firm?

Because without them, the firm is doomed.

It's critical that you help your clients get their mindset right and help them spot all the opportunities in their own lives and businesses.

And to best serve the clients of your firm, and to take advantage of the opportunities for growth that very much exist during this time, you and your team have to work from SOMEWHERE.

This special report therefore seeks to help the owner(s) and/or management of the small law firm to make a practical and pragmatic plan to function as a **virtual organization**, should your team be required for some period of time to operate remotely.

Included are tools, strategies, step-by-step instructions and practical advice that can help your law firm at least survive to fight another day. In addition, you can visit www.LawFirmPandemicGrowthResources.com to request updates and additional related information and resources as they become available.

Mindset Matters: If you play your cards right, your law firm may even emerge the other-side of the pandemic a bigger, better and more profitable business – better-equipped to help its clients, former clients, referral sources, potential referral sources and even some of the firm’s strategic-vendors too.

NOTE: The coronavirus pandemic represents multiple challenges to a law firm: medical, economic, and operational. This special report seeks only to address economic and operational aspects of the pandemic. Any references to medical information are meant either as helpful reminders and/or to help the owner of the small law firm who finds him or herself surrounded by staff and clients looking for leadership, to keep things in perspective.

INTRODUCTION

Well here we are. Approaching a total shut-down of non-essential businesses nationwide. Grocery store shelves emptied out. Schools closed and parents panicking. Toilet paper (and common sense), in short supply. COVID-19 (“coronavirus”) is affecting our economy in all sorts of different ways.

BUT THIS IS NOT UNPRECEDENTED.

Make no mistake about it: This is very much preceded. And those well versed in the history of law firm management and who understand the *opportunities for growth* under such circumstances will have a significant advantage over those who approach the weeks and months ahead as if it’s all brand-new. It is not

<u>Pandemic Name</u>	<u>Years Active</u>
Spanish Flu	1918-1919
Asian Flu	1957-1958
Hong Kong Flu	1968-1970
HIV/AIDS	1981-Present
SARS	2002-2003
Bird/Avian Flu	2003-2017
Swine Flu	2009-2010
H1N1 Influenza A Pandemic	2009-Present
MERS	2012-Present
Ebola	2014-2019
COVID-19 (Novel Coronavirus)	2019-Present

The above (and incomplete) chart is not presented to induce fear or panic. Quite the opposite. It’s meant to put current events into perspective.

The world of small law firm management has experienced health-related epidemics and pandemics many times before. And while not exactly the same, there are clear similarities in terms of how governments, consumers and neighbors behave each time the world experiences natural disasters including:

- local tornadoes, earthquakes, floods and fires;
- regional hurricanes, earthquakes, and tsunamis;
- national droughts, earthquakes, and tsunamis;
- manmade tragedies including countless bombings, shootings and other acts of local, national and international terror.

The point being, there's not much about how the current pandemic is likely to affect the economy and how small law firms will be affected by it, that is totally unprecedented.

What IS unprecedented, however, are three factors for the thoughtful small law firm owner, CEO, COO, and/or CFO to keep in mind while making pandemic response plans for your firm:

- 1.) **Advancements in modern medicine.** The severity of the current pandemic is likely to be LESS than previous pandemics throughout history. The ability of modern medicine to respond to the current pandemic is unprecedented in a good way.
- 2.) **Prevalence of social media.** The volume of and velocity at which unverified information and unqualified opinions are being disseminated to the public (which includes clients, former clients and staff of your law firm) is unprecedented. Consider that Facebook (as only one example) did not even exist before 2004. The very first "smart" phone wasn't introduced until 2007.

- 3.) **Finally, the high levels of media attention** and essentially nonstop coverage paid to the current pandemic, relative to all others in history, is unprecedented.

Throughout history, news used to spread much-less-quickly and with far less repetition. People could digest information and decide for themselves what to think and how to feel about it without the nearly incessant barrage of information your firm's staff, referral sources and clients experience today. These realities make filtering accurate and reliable information from rumor and speculation much more difficult.

And significantly, the barrage that the staff, family, friends, and co-workers of your firm's clients and referral sources are experiencing today can be expected to "bubble-up" to your law firm too, in predictable ways.

WHAT COMES NEXT?

There are four parallel and simultaneous tracks that owners and professional managers of small law firms must attend to in the weeks and months ahead:

- 1.) **Protecting your own mindset** so you do not get "sucked into" the noise that is there already and will grow in intensity all around you.
- 2.) **Looking after each member of your team** in terms of his or her own a) physical, b) mindset and c) emotional needs to be sure they do not "infect" the rest of the team.. not physically with disease; not with distracting thoughts about unproductive topics; and not even with legitimate emotional concerns for their financial well-being and the financial well-being of their household, personal productivity, job security, etc.

- 3.) **Looking after the legal, financial, emotional and mindset needs of the firm's current clients, former clients, referral sources and strategic vendors.** While this third category is ultimately the most important, strictly-speaking in terms of the financial well-being of the law firm, it should be obvious to the experienced law firm management professional that it is quite hopeless to try and attend to this category, unless your own head is straight and your team is in a good place, too.
- 4.) **Finding ways to keep getting productive work done,** when health precautions and/or government mandates force you to take your law firm virtual. Especially if your team has limited previous experience working virtually.

***"The pessimist sees difficulty in every opportunity.
The optimist sees opportunity in every difficulty."***

-Winston Churchill

WHAT MAKES LAW FIRMS DIFFERENT FROM OTHER BUSINESSES?

During times like these, law firms are poised to experience much larger "swings" of fortune than most other sorts of businesses.

Consider the following types of businesses. Many of your firm's clients are either in one of these types of businesses or perhaps employed by one of these types of businesses. Consider also that your firm may employ staff who share a household (and household income) with someone who also may own or be employed by one of these types of businesses.

RETAIL BUSINESSES

When the government shuts down a local economy in response to a pandemic or other natural disaster, retail sales obviously suffer. And there are a limited range of opportunities for management of a retail store to help their clients in times of pandemic-related-crises.

But there is a saving grace for a retail store. After the pandemic has "cleared," the stockroom will still be full and consumers will soon return to their previous behavior. So for example, while the retail shoe store may not sell any shoes during the height of the pandemic, once the pandemic clears it will still have all those unsold shoes to sell.

MANUFACTURING BUSINESSES

Excluding those manufacturers whose products are in high demand during a pandemic (toilet paper, for example in the current pandemic), most manufacturing operations will slow down or come to a stop.

- If operations only slow-down the manufacturer will have a supply of items which were produced during the pandemic, ready to be shipped for distribution.
- If operations stop altogether, the manufacturer will still have the same quantity of raw materials available after the pandemic as it had before with which to return to normalcy.

TRAVEL & HOSPITALITY BUSINESSES

An unused airline seat is of zero value to an airline the minute the airplane goes wheels-up. Fresh produce that cannot be frozen, canned or otherwise preserved is of limited long-term use to the restaurateur. Bars are a unique exception insofar as liquor tends to have a much longer shelf-life. And even though it's sold in a restaurant or hospitality business, the "long life" nature of alcohol separates the bar from the restaurant in terms of how it should be considered in times of pandemic or natural disaster.

PROFESSIONAL SERVICES FIRMS, SPECIFICALLY LAW FIRMS

Regardless of whether the professional services firm bills by the hour (not recommended), based on a contingency agreement, or value-based (flat fee), **the primary asset of the law firm is the experience and expertise of its staff** who must make use of those experiences and expertise "by the hour."

"Hours" are therefore akin to inventory for a law firm. And this particular class of inventory is highly-perishable insofar as the fact that any hour NOT put to productive use to advance case or cause of a client, or which is not otherwise used to advance the business interests of the law firm, **is lost forever and can never be recovered**. Consider:

- With a retail store or a manufacturer, unless it trades in goods that have utility value to those suffering the immediate or fall-out effects of a pandemic, there is little "value add" it can offer its customers or clients. But at least these types of businesses can count on having inventory or raw materials with which to recover, after the pandemic passes.

- Travel and hospitality-related businesses have limited options for offering added-value to their customers for the simple reason that social distancing is the order of the day. Even so, restaurants and hotels will at least retain their physical plant even after the pandemic passes. And it is relatively quick and easy to replenish and replace perishables. All of this together with the high cost of a physical plant offers restaurants a measure of “staying power” in the sense that competitors cannot just suddenly pop-up and move right in next door, to lure their customers away.
- Law firms (indeed most professional services firms) in comparison are uniquely positioned to experience one extreme or the other. If the hours during which a pandemic persists are not put to deliberate and productive use, the law firm loses the potential value that could have been produced with those hours, forever. In short order this can produce devastating effects on the cash flow of the law firm, from which it may never fully-recover.

WHY YOU MUST ACT NOW

If management of a law firm fails to take necessary and appropriate actions to protect its clients, former clients, referral sources and the team that works for the law firm, then once the pandemic has passed, the firm’s clients (and former clients and referral sources) will simply find alternative service providers to attend to their needs. In this sense, the ongoing success of a poorly run law firm whose leaders fail to take decisive and courageous action is quite a fragile thing.

However, a law firm whose leadership and team do take necessary and decisive action (and the more proactively the better), those firms will find themselves with a more stable, a more economically-healthy client base (current and former), as well as a stronger network of referral sources.

In this way – even though the law firm might suffer a temporary cash flow shortage if it runs out of productive client work to do in the pipeline, **it will benefit from a surge of new business after the pandemic passes.** Such a surge will be magnified by two factors:

- a. First the fact that (sadly) most small law firms do not have the benefit of professional management or even a written business plan, will therefore fail or delay in taking appropriate action. Many of those small law firms will be unable or slow to recover.
- b. Secondly, all the pent-up and added demand for legal services during (and precisely because of the pandemic) will suddenly be out in the market ready, willing and (with a bit of creativity on the part of an experienced management team) able to engage the services of the fewer-than-before law firms, that will still be in business in a given market.

So yes, law firms are indeed different from other businesses. And those differences can be leveraged to GREAT ADVANTAGE by owners and professional law firm management who are proactive and paying attention.

A key point to also consider in the current situation regarding coronavirus versus other scenarios is that unlike a natural disaster, pandemics do not tend to disrupt utility or telecommunication services.

This is why that even though you may not be able to continue operations within your current office or facility, **you absolutely can and must transition to a virtual mode of operation whereby workers continue focusing on the firm's key priorities even though working remotely.**

TACTICS FOR YOUR STRATEGIC ADVANTAGE

- Right now you have an opportunity to serve clients by being the ONLY lawyer willing to go out there and work to earn their business.
- Other law firms are going to be turning business away – focused on acquiring and conserving cash today. Instead, you need to keep your team busy and occupied.
- We've got to get work. You don't want to turn work away. And you don't want to lower your price. If it requires payment terms, take payment terms.
- Dan Kennedy said, "Most people try to get a client to squeeze work out of them." Most lawyers do exactly the same. Instead, we want to try to get every piece of work we can to earn the right to call someone a client.
- Every other lawyer right now is going to be saying "No, I can't help you because you don't have the full fee."
- YOU are going to be the ONLY lawyer who says, "I can help you... just give me \$100." Or \$500 or whatever, a relatively small down payment.
- Even if you only can get \$100, you can sign a limited engagement, which makes it very clear in writing that it's a limited engagement until payments are made.
- You can therefore come out of the pandemic with a whole bunch of new clients.
- And you end up with a gigantic surge and cashflow when this finally winds down.

BE THE LEADER YOUR TEAM NEEDS NOW

We don't recall exactly who said this, but it's so true:
"Difficult times reveal great leaders."

- Our job as leaders is to look after our people, give them work to do, instructions how to do it, and the tools and resources they need to do it.
- Our job is to give them the policies, procedures, guidelines on what's acceptable, what's not acceptable as they do it.
- Our job is to give them a mission to get on board with... give them a reason why to carry out that mission... give them everything they need to join with you on that mission.

The hardest part of building a superstar, amazing, great law firm is building a great team.

Lawyers who are broke don't understand that. They think the hard part is finding clients. Ridiculous. Clients are everywhere. People who need help are everywhere. And in a pandemic, and immediately following a pandemic, there's going to be an overflow of people who need help.

The competitive advantage is going to go to the law firm that has kept its team together.

Recruiting, interviewing, onboarding, training, engineering opportunities for them to earn your trust, and waiting for opportunities to present themselves so you can earn their trust - THESE are the biggest challenges of building a successful business, a successful law firm.

So the law firm owner who jettisons his or her team at the first sign of trouble, is basically saying:

"The tide is coming in. It's going to float all boats. So let me first make as many holes in my boat as possible so that the tide sinks me instead of floats me."

It's the most self-defeating thing you can do.

PUT YOUR TEAM INTO ACTION

Here's what you should be doing instead - and these will all work in any practice area:

- First is do the work for which you've got money in the trust account, because you can easily transfer that from the trust account to the operating account and, boom, you're liquid.
- Second is work that you know clients will pay you for.
- Third is call on former clients. Call on everyone that came in to see you that didn't hire your firm and get them to hire your firm. Find a deal that can work. Take collateral. For examples on taking collateral, go to www.LawFirmPandemicGrowthResources.com.

Then get your staff to work on things you've been meaning to get around to.

- You were going to pay them to reorganize your files anyway, just pay them to do it now.
- You were going to pay them to draft proposed job descriptions and policies and procedures for how they do their jobs, you might as well pay them to do that now. They're sitting at home with nothing to do, and they've exhausted all the other stuff is worth doing.
- And then if you run out of that, then you've got special projects - "Look, here's a bunch of special projects that we weren't planning to do, but we'll let you do them now."
- And last and not least is trying to freelance out your team. Call other firms, call your clients, call other people whose businesses should also be thriving because of this and tell them, "I've got an amazing team and I don't want to lose them. They've got some free time. These are the kinds of amazing things they can do. Do you have work that we can give them?"

For more information on how to put your team to profitable use during downtime for whatever reason, go to www.LawFirmPandemicGrowthResources.com.

HAVE A SERIOUS CONVERSATION

Now it's time for a real conversation from the grownup table. Because you may have to have the conversation with your team and tell them that you don't have any cash to pay them.

Now let's think this through as to what will happen rationally and logically.

1. Number one, if they believe in your vision, if they believe in your mission, if you are the kind of leader who great people want to follow, they're not going to want to leave you hanging. Not saying no one will leave you hanging, but the right people won't want to leave you hanging.

2. Number two is a practical matter. It's not like they've got other opportunities to go out and find other work during the middle of the pandemic.
3. Number three, you're not just going to say, "I can't pay you." You're going to say, "I can't pay you, and I'm going to give you a promissory note. I'm going to give you an IOU." You're putting it in writing, you're not just asking them to hope for the best.
4. And number four, it's really tough to be sitting at home with nothing to do. You're going to lose your mind. So people want to be productive.

If you're the kind of leader who great people want to follow, they will want to be part of what you're doing. They believe in your mission. They believe in the work you do. They care about your clients.

Point being, this is part of what we talk about when we say entrepreneurial maturity. You've got to sometimes have tough, mature, grownup conversations.

A DAY IN THE LIFE OF YOUR VIRTUAL TEAM

When you have employees working remotely, you must have specific assignments and projects to complete during this period.

Encourage a "Cameras On" Culture!

Having daily video meetings helps continue the sense of community and prevents employees from feeling isolated. So use a video conference system like Zoom and have a backup plan in case it doesn't work properly.

NOTE: Zoom has donated their platform for all schools who need to do virtual teaching, so we are not sure how stable will their servers be, so if you experience problems other alternatives include:

<http://gotomeeting.com/>

<https://www.bluejeans>

<https://www.uberconference.com>

Communication Tools

Email is the easiest option for firmwide communications and messaging. But there are SO MANY better options for INTEROFFICE communications.

- Slack
- Flock
- Google Hangouts
- Skype
- Voxer

Daily Meetings

When working remotely, employees should plan to attend a "Top of the Morning" meeting at XXXX a.m. (15-20 minutes) and a "Close of Business" meeting at XXXX p.m. (15-20 minutes) with their department/supervisor.

Top of the Morning Meeting Agenda

A. Each employee

- What is the next thing that needs to be done, by when?
- How long is it going to take?
- Obstacles? / What is needed from other employees?

B. Message from the manager/supervisor

- Official communications

Close of Business Meeting Agenda

A. What was accomplished?

B. What obstacles need to be solved?

C. What new directions or issues were uncovered and what solutions?

CLOSE OF BUSINESS STATUS REPORT (ALTERNATIVE)

This summary must be emailed to your direct supervisor by 5:00 p.m. each day. All client notes must be updated in the Case Management System daily.

Employee Name: _____

Date: _____

Total Hours Worked: _____

Client/Case Work – Key Actions/Notes

- Client 1 Name, Issue, Updates
- Client 2 Name, Issue, Updates
- Client 3 Name, Issue, Updates

Projects Work

- Item 1
 - Key Action/Notes
 - CRM/Spreadsheet Updated
- Item 2
 - Key Action/Notes
 - CRM/Spreadsheet Updated

(EXAMPLE: Clients/Cases Worked)

*All client notes are updated in the Case Management System daily

- Johnson, Milia; Harris, Ursula; Adams, Michael; Stephens, Sheila
- IT Issue: Checked email storage capacity, Billing: Completed sending out all invoices for the following clients etc.
- I will be out tomorrow and arranged coverage of emails by Mary Sue.

REGULARLY SCHEDULED MEETINGS

Pre-scheduled meetings should continue to be held using videoconferencing when possible:

- A. Bookkeeper/Metrics Reviews
- B. Marketing & Sales Department
- C. Administrative/Executive Team
- D. Legal Production/Weekly Case Status
- E. Systems, Policies and Procedures

Connections call with Staff (Weekly)

- A. How are they doing? (family needs, health, etc. so you're aware of any problems before they arrive.)
- B. How are they managing work, and concerns/ questions
- C. Review of work progress (use Keyboard Tracking as necessary)

HTM IS HERE FOR YOU

Our mission is to help small law firm owners create better lives. If you need help getting through the pandemic, please schedule an appointment with our team and discover how our programs can help you thrive. Please visit:

www.HowToMANAGEaSmallLawFirm.com/Appointment

Please do not isolate, do not shut down, and do not struggle without a life raft when there are proven policies, practices and systems that can help you not just survive, but continue to GROW.

Do not make rushed or emotional decisions. Call us.

Stay in touch with your C-Suite. Call us.

Let us help you navigate through this current situation. Call us.

Let us help you work on your eight-week plan. Call us.

We've prepared this report to give you tools to get through this time and operate as effectively as possible, with as little disruption as possible, by leveraging current technologies and tools that will enable you to continue to function as a virtual organization.

To that end, the following pages of this Special Report offer a more detailed discussion of examples of work and technologies that can be deployed even on short notice, and other best practices for being productive at home or remotely.

GENERAL GUIDELINES TO OPERATING A FIRM VIRTUALLY

- **Develop the Proper Mindset.** First off, this may be a big change for business owners who are (a) not comfortable with technology and (b) especially for those who have trouble delegating and trusting. Stop controlling and start trusting.
- **You Must Get Up to Speed QUICKLY.** You want to make this happen as fast as possible and recognize that it will most likely be for a short/temporary amount of time. Therefore, do NOT expect perfection. Expect hiccups while learning what works well and what doesn't. Test and tune and make the best of the situation as we go. In many situations, we are not looking for the long-term perfect solution. We are looking to get you and your team productive and profitable in a new virtual quickly and painlessly as possible, with minimal disruption in service to your team. If you discover that you actually like this kind of firm, environment as we can build the *Cadillac El Dorado* of Working remotely - but it takes time.
- **Working from Home May Be Mandated, But it is Not an Entitlement.** Unless it's mandated by the government that everyone must work remotely, YOU can decide which employees are suitable for working from home based on their work habits, quality, and attitudes. You will know quickly which of your employees you can count

on and who you can't... in fact, you already know. Performance problems and lack of accountability don't improve with less centralized communication.

- **Remote Doesn't Mean AWOL.** Some employees need to remain client-facing and remain available and responsive to callers, leads, prospects, clients, opposing counsel, judges, etc. We need to have individual meetings with those employees to set standard work hours and communicate expectations to be available to you, to clients, to coworkers. Set expectations for how quickly texts, voice mails, etc. need to be responded to.
- **Appropriate Levels of Oversight and Supervision.** While some employees will require significant supervision when working remotely, other employees may be able to work with a more project-management style. Ask for results and agree on deadlines and then focus on results and deadlines, not "being busy" and not counting minutes or hours.
- **Results Matter.** You may find it helpful to accept now that people may not work steadily from 8-5; working remotely is not about counting minutes (although you need to establish policies, so your company does not end up paying unnecessary overtime) it is about managing by results and projects.
- **Use Time Blocking.** Have office hours for interruptible work time. Have time blocked for uninterruptible time. Decide on your communication channels early, get everyone using the same tool, and make sure they do not drown on email.
- **Self-Leadership.** Your employees need to learn the concept of self-leadership. You must teach them accountability and self-ownership and communicate to them that their work ethic will have an impact on whether we all come out of this situation victorious or not. Believe it or not, people want to do good! Help them be good employees, you need to instruct them and tell them you know you can trust them, then give them timely feedback when they are doing well.

- **Communication is Huge.** Talk to your employees individually and as a team: “What can I realistically expect from you and what can we expect of each other?” They won’t all operate at the same level. Make sure you establish clear guidelines with your staff on how they should be communicating. You do not want two people communicating by email and others by Slack or Vower, and others on text or Facebook, so set guidelines as in “here are the situations when to use text; use email for communications about XXX; use Slack for communications about YYY; in certain cases pick up the phone and call.”
- **Team/Staff Management** – At How To Manage a Small Law Firm, we use Asana, but you can use Trello, Monday, and others. You want to be able to set projects, give access to the projects to certain people, assign tasks and priorities and due dates to each “area” of your company and have instant visibility into what each person is doing and the workflow progression. (For example, you can create “teams” that are for AR collection or for those working on project YY, etc.)
- **Check Your Insurance Policies**
 - You might have insurance that covers business interruption – if so, check if the policy covers pandemics, some do, some don’t. If they do, you could recover some of your lost profit
 - You can expect that vendors will start breaching their contracts, therefore you must seek counsel, or have a business attorney you can call at a moment’s notice.
 - There are some clauses and releases in commercial leases that allow people to withhold rent if things like the COVID-19 takes place, look into that – call a business attorney like Marissa Portuondo or Brett Trembly.

- **Practice Management and CRM :**

- The majority of CRM systems are on the cloud. (For example, Practice Panther)
- If yours is not, that is a problem when you're working virtually and you will need to switch.
- You'll want to harvest time tracking (for example, <https://www.getharvest.com>) You can track time and the completion of tasks, reminders of invoicing, etc,
- With the right tools all these are easy and inexpensive things to do.

- **You Need to Have a Plan B**

- Assume either your staff or their families will get sick. You need to have a contingency plan to operate when that happens
- Have contract people who can be deployed at a moment's notice.
- You can use services like Upwork to find contract help.
- Lawclerk.legal - great service to match you with attorneys over the country that do court appearances
- Steven Dawyne - The freelance firm (<https://thefreelancefirm.com>) has attorneys in Florida and they will do court appearances, expanding nationwide.
- Virtual intake - Billie Tascio Modern Law Practice (<https://modernlawpractice.com>)
- **Virtual Assistant**
 - » Places like Upwork
 - » Get Staffed Up
 - » Belay.com

SALES IN A VIRTUAL LAW FIRM

A common mistake many small law firm owners and inexperienced law firm administrators are making right now is believing that no one will hire a law firm.

In fact, it's quite-the-opposite.

In many instances we see that it is precisely the disruption to a prospective new client's daily life that prompts the decision to finally hire a law firm to get started on a long-considered or much-needed action.

Plus, in times of disruption, we find that potential new clients are often more self-reflective and extra-sensitive to the consequences of delay and indecision and they often have plenty of free time on their hands as well.

Modern technologies and best practices for facilitating new client engagements, especially while both client and lawyer and staff may be forced to work from home, are discussed below:

CONSIDER SETTING UP:

- a. Zoom account for your salesperson (zoom.us)
- b. If you don't have a CRM with an automated Intake Pipeline (Lawmatics, Clio Grow), then convert your excel tracking sheet to "one drive" if using Microsoft Suite or a Google Drive document to track all leads
- c. Consider creating a Skype account for telephone communications
- d. Agree on specific objectives and goals in light of virtual consultations
- e. Every day assess the mindset your salesperson is in (have a phone call)
- f. What will he/she expected to do during those times where there will be no consultations?
 - Agree on number of outbound calls/ Gas calls, Follow ups/ anything else?

ADDITIONAL DEVELOPMENT/TRAINING

- a. Discuss how to talk about COVID in sales calls; it will come up.
- b. Create list of common fears/objections related to COVID and how to handle them
- c. Ensure salesperson is keeping track of new/uncommon objections for further development (on tracking sheet, use "Reason not engaged")

WHAT TO TRACK BY CLIENT

Refer to Lead and Sales Tracking document or CRM.

- a. Client Name
- b. Lead Source
- c. Referral Name (if applicable)
- d. Type of Case
- e. Est. Case Value
- f. Schedule Consult?
- g. Date of Consult
- h. Show Up?
- i. Engage?
- j. Date Engaged
- k. Date Follow up
- l. Not engaged: WHY?

WHAT TO TRACK FOR THE FIRM

Weekly:

- a. # appointments scheduled
- b. # sales calls conducted
- c. % show up rate (calls conducted / appointments scheduled)

d.# converted into clients

e.% conversion rate (converted into clients / calls conducted)

OVERALL RECOMMENDATIONS

a.Keep a close eye on conversion rates on a daily basis!!

b.Have a call with sales team at the beginning of the day and at the end of the day

c.Have the salesperson record some calls (just their end of the calls)

d.If the salesperson has never sold over the phone, do a couple of consultations and record them for training and then track, track, before you allow them to fly solo, do not turn over all your leads until you know their conversion rate over the phone is comparable to that in-person.

e.Decided if for the time being, depending on number of consults, you must take over, while you train the dragon

f.If you see a change in the "show up rate" consider sending an email the day prior reconfirming (or changing language in pre-engagement glidepath) and/or reconfirming all consults with a phone call the day before.

g.Consider using text to confirm consultations (Skipio.com) is a good alternative

MARKETING IN A VIRTUAL LAW FIRM

Note that "marketing" is everything a law firm does to bring the right kind of prospective new clients to the right place, at the right time, in the right frame of mind and already pre-conditioned and predisposed to engage the services of the firm.

Remember, they (your potential new clients) have problems that are exacerbated by the current situation, you HAVE SOLUTIONS, it is a matter of reaching out to those people!! And right now everyone is on the internet as we are all practicing social distancing.

MARKETING PLAN

a. Update Your Website

- Add changes to office hours or court hours/access
- Confirm continued operations
- Contact information and availability of video conference for client meetings
- Contact information and availability of video conference for consultations for new clients

b. Update VoiceMail/Answering Service Messages as necessary

c. Send messages to email list (clients, referral sources, former clients)

- "We are OK; we are a business; we are prepared and your matters will not suffer."
- "We got you"
- "How we can keep YOU updated with changes to court schedules, etc.?"

a. Take stock of what marketing activities you already do/ have planned. Triage the list:

- What in-person activities/events can be moved to video conference:
 - » Lunch and learns

- » “Coffee” meetings
- » Seminars/Presentations
- » Networking opportunities you can become the lead at
- What activities can continue essentially in the same fashion, and can be ramped up if needed?
 - » GAS (Give A Shit) calls to past clients – to get a script for how to conduct an effective Give A Shit call to current and former clients, visit www.lawfirmpanemicgrowthresources.com/
 - » GAS (Give A Shit) calls to current clients
 - » Calls to referral sources
 - » Calls to potential referral sources
 - » Digital Marketing - look at new ads “we’re open”, “serving you during this crisis”. Speak to your vendor.
 - » Newsletters - may want to add special section or supplemental editions
- What activities have to be currently suspended
 - » What is the communication plan to them and involved parties.

b. Have a team meeting (get everyone’s input) on what kinds of innovative marketing you can do **right now**:

- Consider starting some networking groups virtually, you can become the organizer and bring people together in a zoom call.
- Look at it from how you can be of service; i.e. dropping supply kits off to single parents, elderly, etc. clients.

NOTE: For more information on innovative ways to market your firm to attract your perfect clients in any economy, make sure to consider our new book “**Magnetic Marketing For Lawyers**,” available for pre-order here: www.HowToMANAGEaSmallLawFirm.com/MagneticMarketing

HANDLING CRITICAL BUSINESS FUNCTIONS IN A VIRTUAL SETTING

Think through and discuss with a CEO or COO the best way to take these paper-based, in-person, in-office systems and get them adapted for the virtual world.

ANSWERING THE PHONES

- a. VOIP phone service or app so receptionist/assistant can answer calls from home
- b. Forward phones to an answering service with instructions on how to route callers
 - Put staff on a "duty schedule" for taking leads and scheduling initial consultations
 - Put attorneys on a "duty schedule" for client phone calls and being hyper-responsive during this time

ACCESSING CALENDARS, EMAIL, CRM, CASE MANAGEMENT, DOCUMENTS

- a. Ensure all approved devices (firm-owned or personal) can connect to the calendars and CMS and everyone is pre-trained on how to use them in a remote environment
 - Be sure staff has access to electronic copy of procedures.

DEADLINE TRACKING.

- a. Train your team to review all correspondence, mail, incoming filings, case files, and enter the deadline on the Firm Master Calendar and docket it in the case management system (if case-related).
- b. Assign reminders and tasks to ensure completion.

MAIL AND SERVICE

- a. Incoming mail – Assign someone to pick it up, scan it, file digitally, route via email
- b. Outgoing mail – Employees will use the post office, arrange couriers and receive reimbursement or use online accounts
- c. Court filings, service of process, service to opposing

counsel/parties, copies to judges - In accordance with your rules of procedure and local court operations

DOCUMENT MANAGEMENT

- a. Which systems (Dropbox, Box, OneDrive - or is it integrated into CMS?)
- b. Case vs. Business
- c. Cases - 1 folder per client
- d. Business - sections for each back office function
- e. Naming conventions

OPENING CASES

- a. Go virtual quickly: Create in CMS and make files on Dropbox. Everything gets scanned and saved to the file.

CLOSING CASES

- a. Close in CMS and follow closing/Post-Engagement Glidepath

ACCOUNTING FOR TIME

- a. Case work tracked in CMS.
- b. Other productive work tracked in project management system if you have one (Asana, Monday.com, etc.)
- c. Or create "administrative" cases in the CMS
- d. Do time tracking in Toggl.
- e. Track your TIME IN and TIME OUT for workday start, lunch, and end of workday so we can take steps to ensure non-exempt employees don't exceed 40-hour workweek without permission.

OPERATING INSTRUCTIONS FOR TECHNOLOGY

- a. As people perform their daily tasks, have them screen record (using Zoom or Snagit) and create video "how to".
- b. Use your cell phone to record how to do mail, set up scanners, etc. and then you can use recordings to get transcribed for written procedures

CASE STATUS MEETINGS AND FILE REVIEWS

BOOKKEEPING, ACCOUNTING, TRUST ACCOUNT MANAGEMENT

BILLING AND ACCEPTING PAYMENTS

CLIENT COMMUNICATIONS

INTAKE AND PRE-ENGAGEMENT GLIDEPATH

WORKFLOWS

POST-ENGAGEMENT GLIDEPATH

ACCOUNTS RECEIVABLE TRACKING & COLLECTION

SALES/CLIENT ENGAGEMENT

a. [Collateralizing Legal Fees, see P&Q]

EMPLOYEE POLICIES RE:

a. Time keeping

b. Work from home

c. Atty/confidentiality & work product privilege

d. Data and device security

e. Productive time

f. Business hours

VENDOR POLICIES

a. Deliveries

b. Service hours

PRACTICE OF LAW

a. Client meetings

b. Document preparation

c. Legal research

d. Motion writing

e. Review every file and determine

- Approaching deadlines and plan of action
- All documents been scanned, payment status
- Client communications and emails documented in case management system
- All documents received have been indexed and reviewed

- Date of last client communication
 - Ensure they are still going to treatment (PI)
 - Ensure they are complying with release, pre-trial, etc. sanctions (Criminal)
- f. PARALEGAL (or create a workflow task in the CMS) assigning work to be done
- g. Client updating them on important deadlines, concerns, items pending, actions we need from them.

PEOPLE

Your people represent a major investment and therefore require significant attention as you move to a virtual setting. At a minimum, make sure to consider and address the following:

TOOLS

- a. Chat and collaboration tool (Google Hangouts, Slack, etc.)
- b. Video calling (Zoom)
- c. Screen sharing (Zoom)
- d. Project management system (Asana, Wrike, etc.)
- e. Automated onboarding software (Workbright, BambooHR, Trainual)
- f. HR software with employee self-service
- g. Recognition and reward system
- h. Time keeping software (Hrundl)

STRATEGIES

- a. Train remote workers on how to work from home more effectively (provide an e-learning course, an online training document, and a video for remote employees)
- b. Use phone calls and video calls (camera on) whenever possible
- c. Train employees how to give recognition to everyone (in and out of the office)

- d. Host all-hands, in-person company events periodically
- e. Hold Q&A sessions with executive leadership just for remote workers
- f. Designate someone to host office hours for questions (Zoom)
- g. Send physical cards, letters, or swag packages in the mail
- h. Check in frequently and regularly (daily stand-ups, weekly one-on-ones, etc.)
- i. Allow remote workers to own or lead collaborative projects
- j. Provide channels for remote workers to provide feedback to the organization (we set up a dedicated email address to receive remote-employee feedback)
- k. Continue to do virtual team building activities to strengthen the bond of the team
- l. Provide channels for management to give feedback, updates, etc to remote staff

CONDUCT A WEEKLY LEGAL TEAM MEETING

- a. The Legal Assistant shall calendar *as standing appointments* weekly 2-hour meetings of the Legal Team to occur the first Monday of the month from 2-4 p.m.
- b. Each Friday, the Paralegal will create an up-to-date case status report (also called Pipeline Report) showing information for each pending case:
 - Current status of the case
 - Critical deadlines
 - Last steps
 - Next steps
 - Any anticipated hurdles

- Whether set for trial or other event likely to require significant firm resources
- Clear designation of Who is to do What by When
- Projection of when case will resolve
- Clients nearing the evergreen "floor"
- Flat fee cases beyond the average case life
- Clients in non-payment status
- Color coding
 - » Cases current and on-track are highlighted GREEN.
 - » Cases with issues and obstacles are highlighted YELLOW
 - » Cases with unpaid bills (30+ days old A/R) are highlighted in RED.
- c. The report will be sent to the Legal Team (Managing Attorney, Associates, Paralegal) no later than Friday at 4:00 p.m.
- d. Each attorney will review the report, identify changes/obstacles/issues for discussion and email those comments to the Paralegal by Monday no later than 12 pm.
- e. The Paralegal will update the report and send the corrected version by 1 PM Monday.
- f. The Managing Attorney will lead the Legal Team Meeting.
- g. The team should not get sucked into substantively working on each case; the purpose of this meeting is to ensure updates and forward-progress of matters. If more than 5 minutes is needed to discuss a matter or client in further detail, a separate meeting shall be scheduled.
- h. This meeting should also be used to identify clients with the potential for additional matters and discuss a sales strategy.
- i. The Paralegal will update the case status report/pipeline report after the meeting and send to the Legal Team and CC to the Owner and Firm Manager no later than 5 PM Monday.

MORNING HUDDLES

- a. All staff meet on Zoom
- b. 2 minutes - update from you (owner). Overall update

on your vision moving forward, how things are doing, accomplishments/wins you've seen

c. 2-3 minutes per person; what are your priorities today for work

d. 2-3 minutes - Q&A

ONE-ON-ONE CONNECTION CALLS WITH STAFF

a. Schedule weekly

b. How are they personally - family needs, health, etc. so you're aware of any problems before they arrive.

c. How are they managing work, and concerns questions

d. Review of work progress.

KPIs

a. Ensure they have clear objectives they can report on weekly (or more)

b. For teams where KPIs are longer term, set short term goals to measure productivity

c. Create a team "score board" on google docs or similar to team can see overall performance.

d. Short Term: Review the job description and set Daily or Weekly targets for performance

- Look at outputs/things they are expected to produce that we can count

- Look at outcomes/the effects of

WORK FROM HOME BEST PRACTICES FOR EMPLOYEES

a. Create a space to work separate from living space

b. Employee should try to set up their office on a quiet space (spare bedroom, or their own bedroom, but away from the craziness of the family and children)

- c. Keep standard work hours as much as possible, at least core hours.
- d. Get dressed for work; continue to be a professional.
- e. Consider creating a policy and dress code for remote work and enforce it.
- f. Take time for breaks, use that time to touch base with family, go for walks, etc.
- g. Create an "out of bounds" statement, clearly depict what is not acceptable behavior or work practices for employees.
- h. SUPERVISE, SUPERVISE, SUPERVISE, until everyone has adjusted to the new rhythm and circumstances.

SPECIFIC WORK PROJECTS EMPLOYEES CAN DO REMOTELY

Here are some opportunities for tasks and assignments you could put into effect immediately.

DIRECT REVENUE GENERATION

- A. This includes NORMAL WORK; CASES IN THE PIPELINE (track everything in CMS/CRM and look at daily reports of work done)
 - Answer phones, take messages, schedule return phone calls & appointments
 - Marketing (see section on this later in this report)
 - Screen new leads & prospects
 - Sales (sales calls, Zoom meetings, client engagements, referrals, etc.)
 - Provisional conflict checks
 - Pre-engagement Glidepath
 - Client meetings
 - Document preparation
 - Legal research
 - Motion writing
 - Review every file and determine:
 - Approaching deadlines and plan of action
 - All documents have been scanned, payment status

- Client communications and emails documented in case management system
- All documents received have been indexed and reviewed
- Date of last client communication
- Ensure they are still going to treatment (PI)
- Ensure they are complying with release, pre-trial, etc. sanctions (Criminal)

SPRING CLEANING / ROUND TO IT / OTHER WORK

A. Track everything in CMS, project management task list, or create a Google Sheet)

- GAS Calls to all former clients
- GAS Calls to all current clients
- GAS Calls & emails to current referral sources
- Close the Loop Sales Calls and get them signed or schedule a f/u consult
- Write workflows (who does what by when, how many minutes does it take the position to do the task)
- Write blog content
- Write newsletter content
- Rewrite Bios on Firm website
- Review all KPI's, templates, emails, documents, webpages, for typos and needed updates
- Repurpose and recycle old Facebook posts
- Clean up and organize Admin Files in Dropbox
- Propose improvements to processes and systems, and create the documentation when approved

MARKETING THAT CAN BE DONE REMOTELY

a. GAS Call campaign to find NEW BUSINESS OPPORTUNITIES

- Call 4 to 5 of your best previous clients
- Ask them "what are your biggest problems right now, in light of the COVID-19 Situation?"
- When you find some correlations amongst them, create a free resource (2 to 3 page PDF resource to solve that ONE problem)
- Create a Video (FB live) to tell the world about it – here's the basic script:

"I have been talking to my clients. I know that right now most of the xxxx (avatar, your ideal client) are suffering from YYYYY (whatever the problem is) because of that, you are experiencing WWWW (consequences, emotions, issues) you want to say this so they can relate to what you are saying.. And that is why I created "NAME OF FREE RESOURCE" So you can X,Y,Z (Benefits) and then CTA (Call to action) to get this resource for FREE simply XXXXX (tell them what to do) and ask them to share this resource with people around them, who they know need help.

- Repurpose that video in your You Tube Channel + Your Newsletter, do a shorter version for Instagram or other social media channels where you have presence
- RINSE AND REPEAT

b. GAS Call Campaign

- GAS Calls to all former clients to make notes on how they need help, look to make referrals
 - » *put together a Google sheet*
 - » *add the names of your former clients*
 - » *assign clients to specific employees for GAS calls*
 - » *have employees update spreadsheet*
 - ◇ *when called*
 - ◇ *what they talked about*
 - ◇ *when they sent f/u email*
 - ◇ *whether they made a referral or need a referral*
- GAS Calls to all current clients
 - » *Calm their fears concerns*

- » Let them know their matter is still being worked on. Let them know what to expect for the time being
 - GAS Calls & emails to current referral sources for top of mind awareness, what can we take off your plate
- c. Building Your Referral Network
- Based on the above GAS calls, identify other professionals who would be good referral partners. Reach out and start the relationship.
 - Start meetings online
 - Find a way to refer business to them
 - Find ways they can refer to you
 - Build a coalition to speak about XXXX in light of Coronavirus
 - Get online, share your message.

YOUR DIGITAL "PLANT"

You'll need to recreate a "digital" version of your "plant" to operate effectively. Here are areas to address:

DOCUMENTS MANAGEMENT

- a. Box
- b. Google Drive
- c. Dropbox. (Has a sync) selective sync select what goes in your computer,
- d. File stream through google drive - like the G:drive in Google drive- access all the files in Google Drive.. nothing goes into your hard drive, and files open instantaneously, works really fast.

CLOUD-BASED STORAGE

- a. If you made the jump from physical servers to the cloud, most of the case management, lead tracking, document storage, and accounting systems that you need are already portable and available for employees working from home whether they use devices you provide or their own personal devices.

REMOTE FILE ACCESS FOR VIRTUAL WORKERS

- a. If you have a physical server, get your IT person to set up a VPN and test connectivity ASAP to ensure everyone can dial in and use the applications.
- b. If you have *no time* to set up VPNs, start putting necessary files online using applications like Google Docs, Box, or Nextcloud. BUT password protect everything on the document level until you can move to a cloud-based environment.
- c. *Don't let perfect be the enemy of good with this option.* We can always make improvements and reorganize things later. Take as many security options as possible as you move from physical server to VPN or the cloud - need to protect your sensitive client data.

REMOTE DESKTOPS TO ACCESS FILES VIRTUALLY

- a. Sometimes people need access to an office-based computer because a specific application is only accessible from inside of the office. For instance, maybe your case management software or accounting software is located on a physical server in the office.
- b. If the *only* way to access the software is by using your computer in the office, consider using something like GoToMyPC (GTMP). It's another quick and easy solution for remote desktop access that you can iterate on later if necessary.

EQUIPMENT

Decide, with the Firm, whether:

- a. To provide laptops, phones, VPN-network access (if everyone is being sent home, can they take their equipment with them for short-term work options?)
- b. Or allow employees to use personal electronic devices.
 - a. In this case do not assume their devices work, do not assume they have all the software required to operate
- c. Create a list of software required to operate and do a survey per employee to ask if they have it or not, if not, you will need to provide temporary licenses.

INTERNET CONNECTIONS

- a. MUST have password protected Wifi.
- b. Recommended high speed internet: 1.5 Mbps or more.
- c. Recommend wired connections for sensitive documents.

SECURITY

All devices (firm-provided or personal) must have:

- a. Anti-virus
- b. Password protection
- c. Remote wipe
- d. Approved operating system
- e. Camera (for video conferencing) - if not camera, an external camera can be provided, it is required for team meetings.
- f. GIVE YOUR EMPLOYEES WRITTEN POLICIES FOR CONFIDENTIALITY AND SECURITY.

SOFTWARE & EQUIPMENT

The following systems should be set up on laptops, phones, or personal devices to allow for remote access AND TESTED to ensure they can connect and be used:

- a. Network (Dial in to VPN or access individual applications using the Cloud)

b. Office Phones (options)

- give staff firm-owned cell phones, or set up a “soft phone” with your current phone company (the soft phone will ring on their cellphones with a company owned number, VOIP)
- install RingCentral/Vonage/Nextiva on everyone’s cell phones and give them a stipend for using their personal phone
- You set up Google voice numbers to employees and assign them. (Alternatively allow employees to set up a free Google Voice #)

c. Office Email

d. E-Fax.com

e. Firm Master Calendar

f. Employees’ Individual Calendars (decide who are the key managers who need / require access to all the calendars)

g. Deadline Tracking and Reminders

h. Case Management System

i. Lead Tracking/Client Intake System/Spreadsheet

j. Conflict Checking System/Documents

k. Customer Relationship Management (CRM) System or Team 100/4 Lists for Lawyers Spreadsheet

l. Task Management (whether in Case Management System, Calendar, or another project management platform like Monday.com, Wunderlist)

m. Document Management/Storage (Dropbox, Box, OneDrive, etc.)

n. Payments (LawPay, Intuit)

o. Bank App (Remote check deposits)

p. Video conferencing (Zoom, Skype, Ring Central, etc.)

q. Scanners

NON-WORK FROM HOME SUPPLIES AND EQUIPMENT.

If there are supplies and equipment needed, decide a point-person who will either come into the office as needed. For example:

a. Copying projects

b. Volume scanning

c. Making binders (for EP signing, mediations, depositions,

court, etc.)
d. Mail

BILLING AND COLLECTIONS

If your engagement agreement allows for “periodic billing,” do interim billing/shorter billing cycles so that bills can be reviewed/edited/issued more expeditiously and collections/cash flow more frequently.

BILLING

- a. Ensure all approved devices (firm-owned or personal) can connect to the Case Management System and that employees track their time.
- b. Train an employee to run daily reports and monitor time entered to ensure all production time is captured. (Either by running pre-bills, WIP reports, or productivity by user reports in the CMS)
- c. Assign an employee to
 - Generate draft bills/pre-bills from the system and save them as PDF
 - Send draft bills to *the billers* with due dates for final edits.
 - Train the billers to edit their time entries.
 - On the due date, print one more round of pre-bills for the Owner’s review and approval (45 minutes of review).
 - Send bills to clients
 - » As PDF via email with a LawPay link
 - » Through LawPay
 - » Through the CMS
 - » Through the case management system “portal.”

ACCEPTING PAYMENTS

- a. Credit cards: Select and train someone to process credit card payments through your system (LawPay, etc.)
- b. Checks: When checks are received in the mail, use the bank's "remote deposit" feature to make deposits. Put bank app on your cell phone and do remote deposit via cell phone if a bank feature, designate one person to do this - who is responsible for depositing checks?
- c. Cash: Assign someone to be the contact to meet and accept cash, give a receipt, and make a bank deposit. Alternatively, Owner can make cash or check bank deposits via ATM if available.

TRACKING PAYMENTS/INSTALLMENTS

- a. Assign bookkeeper/billing specialist to review deposits and trust transfers and compare to expected installments payments and outstanding bills.

ACCOUNTS RECEIVABLE

- a. Assign bookkeeper/billing specialist to make AR calls on a daily basis following the above deposits review.
- b. Collect AR - take payments via phone or electronically while on phone to process through Law Pay.
- c. Determine necessary payment plans, red-rubber bands and case withdrawals.
- d. GET NEW WRITTEN PAYMENT PLANS. COLLATERALIZE PAYMENT PLANS.

REPORTING/TRACKING:

- a. Generate Invoicing/Payment Activity Reports Daily
- b. WIP Reports Daily
- c. Update Case Management and accounting systems with financial activity
- d. Update client contact and payment information if different than norm
- e. Get standing written authorization for future payments

FINANCIAL CONTROLS

COLLECTIONS

- a. Establish controls over non credit card receipts, define the process for bank deposits. (See billing section above.)
- b. Issue bank deposit instructions to clients
- c. Provide clients with the ability to make direct electronic bank deposits to the operating account
- d. Establish the ability to make remote direct electronic deposits for checks received in the office

DISBURSEMENTS

- a. Limit approval / authorization for the amount of electronic disbursements. Ideally, this should be limited to the owner.
- b. During this time, only the owner should be approving payments/disbursements of any kind.
- c. Minimize, ideally eliminate, all automatic debits to bank accounts.
- d. Bank balances should be monitored at least twice a day to look for unusual/unauthorized transactions.

PAYROLL PROCESSING

- a. Define procedures for the electronic approval of payroll disbursement. This should include the review of payroll prior to disbursement.

TAX PAYMENTS

- a. Define joint procedures with your bookkeeper to ensure all tax withholding, estimated tax payments are made on their due dates.

BOOKKEEPING

- a. Talk with your bookkeeper and get an alternative contact / backup emergency contact if you do not have one if you are working with a sole practitioner.

BANKING

- a. Test logging into your bank operating account from home so you tackle any security questions / verifications while the bank still is open / has online support teams available.

PER DIEM

- a. Identify what expenses, if any, the remote employee will incur in working from home and set/communicate reimbursement policy
 - Cell phone, internet, etc.

KEEP THIS IN MIND AS WE MOVE FORWARD

You are a pro. Your intention as regards your law firm is vitally important right now.

If you approach this time with the intention of being the level-headed leader your clients need, they will appreciate you for it.

They will remember you for it.

They will tell their friends about it.

If your intention is to stay in service and add value in every way you can even during this challenging time, clients who need your services will gravitate to you.

If your intention is to be a strong and visible resource, you will be seen as the strong and go-to resource. This happens for two reasons:

The first reason is that when you stay committed to your mission, you are sending out signals that say, "I'm here for you" at a time when people are fearful and need to feel safe.

The second reason is that you are likely to be the MOST if not ONLY visible resource because your competitors have already turned on their "out of office" automation and are quarantined catching up on Netflix.

When this crisis passes, they will be forced to catch up or start over.

You, on the other hand, are not going to lose steam, money or the solid reputation you've worked so hard to build. Instead, you are going to move forward with confidence knowing that you are taking concrete steps to define the very best future possible.

Let our team help you thrive during this pandemic. Schedule an appointment to learn more about our programs at:

www.HowToMANAGEaSmallLawFirm.com/Appointment & visit:

www.LawFirmPandemicGrowthResources.com to download more free resources like this one with tips for managing and growing your law firm during this crisis.