

PRACTICE MANAGEMENT SYSTEMS AND VIRTUAL LAW PRACTICE

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MITCH ZOLL



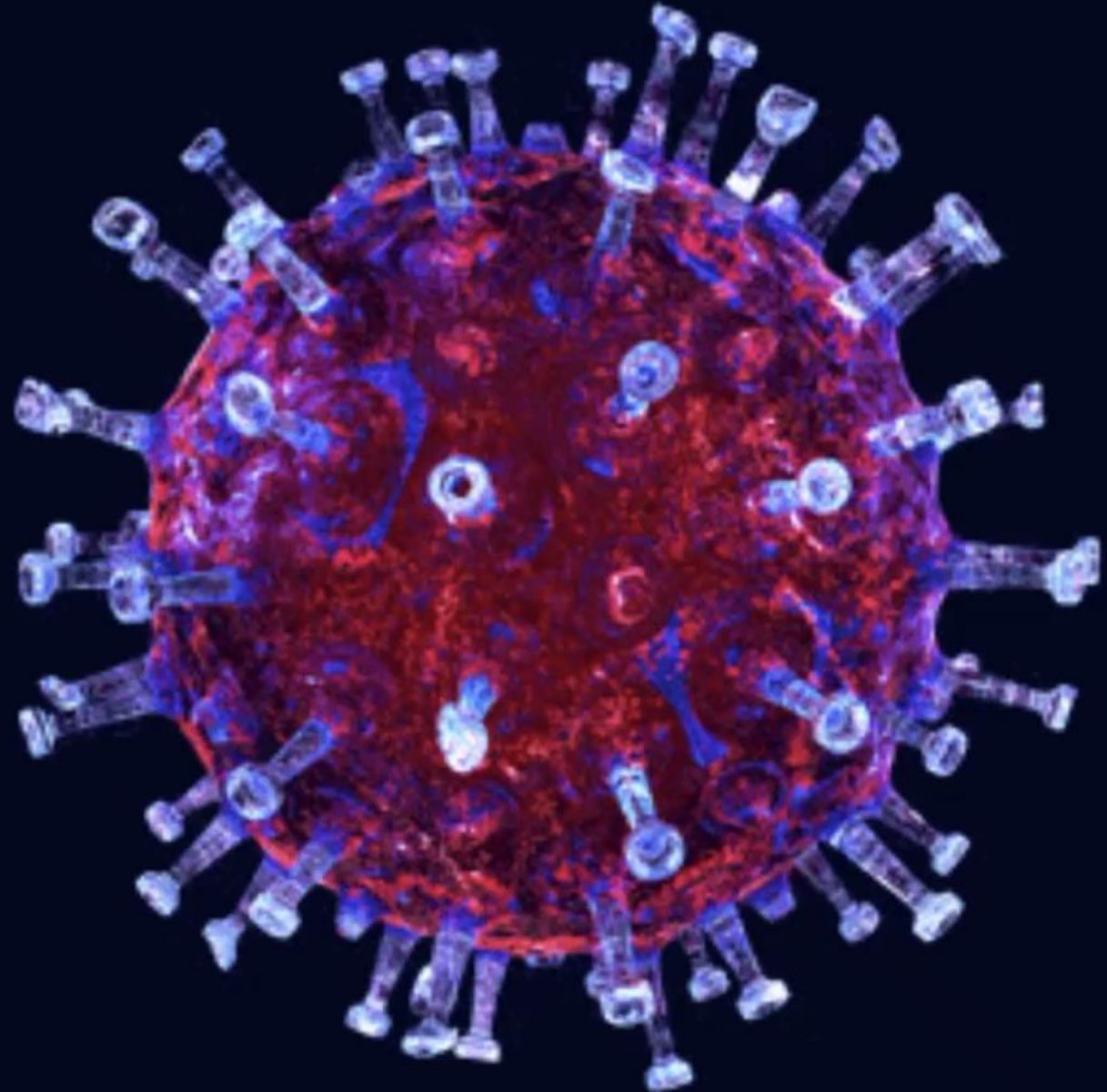
Why Virtual Law Office?

Before:

convenient
optional
free time/ icing

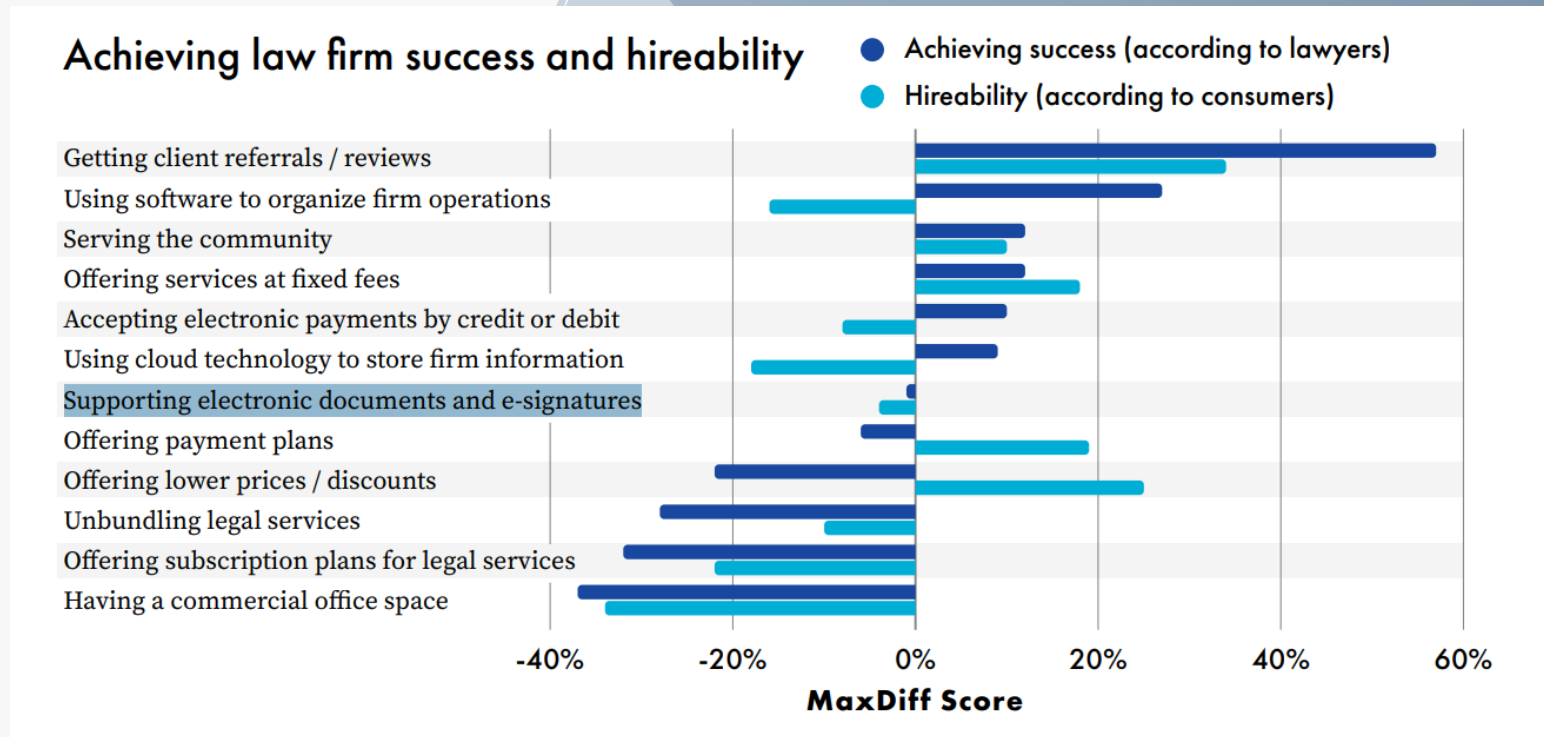
After:

necessity
mandatory
survival/ cake



Why have a virtual law office?

Clients and Consumers both say Commercial office space is the lowest factor in success and hireability



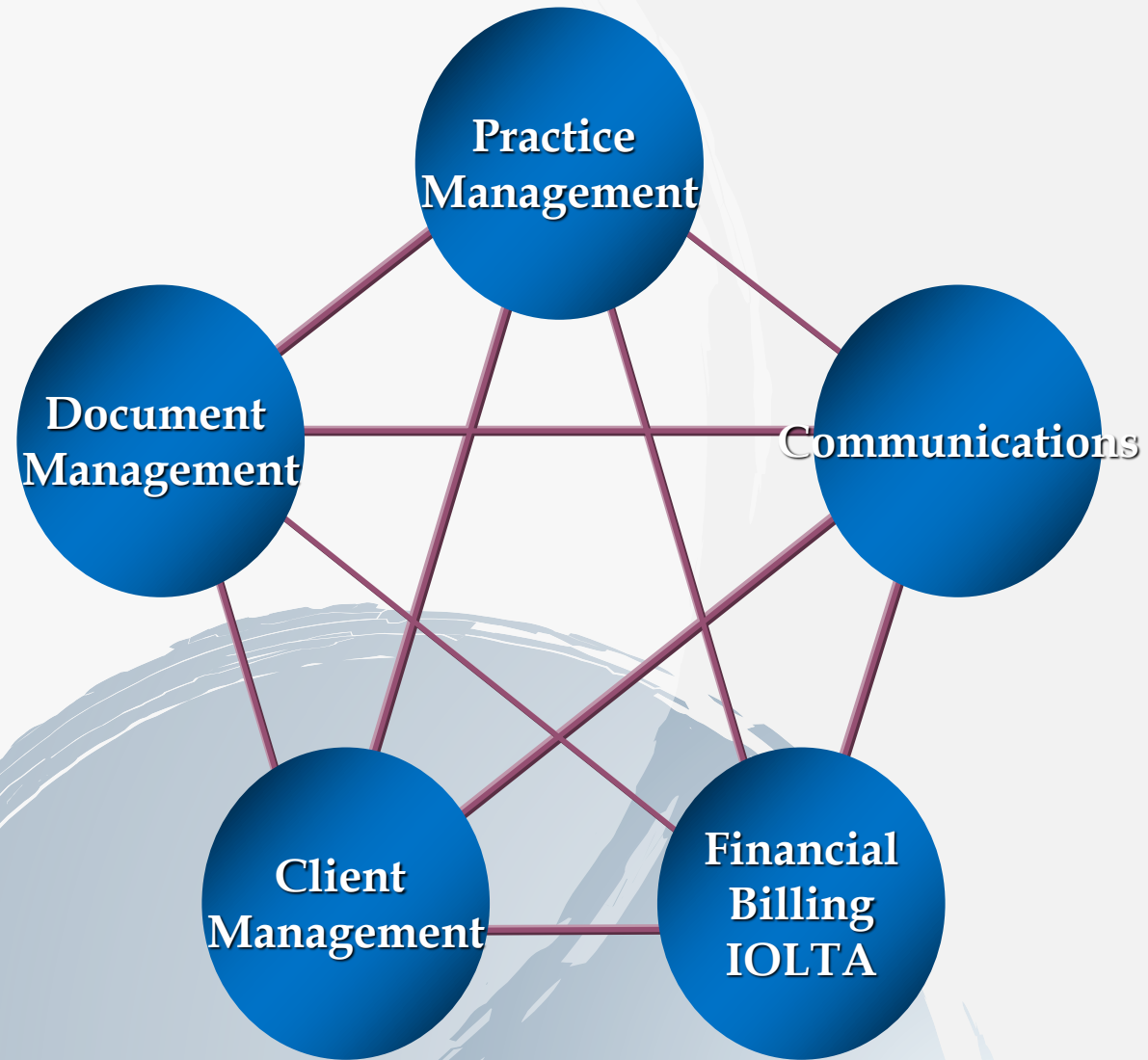
- “Brick-and-mortar law offices don’t factor into success. Access to commercial office space **ranked dead last on the priority list for both legal professionals and consumers**, which brings into question the in-person nature in which legal service has traditionally been practiced.”

What are the key features of a Virtual Law office

- Work **anywhere** at any time
- Digital Access to clients and data
- Processes and systems in place to work seamlessly and in any environment



Key Virtual Law Office Systems



Practice Management Solutions

- Starts with law firm Specific Practice Management Solutions



Practice Management Solutions

- How to Choose

- ☐ Plan the features you need

- ☐ Does it need to integrate with programs you already have
- ☐ Billing – included in the solution or integrate with QuickBooks
- ☐ How advanced is your document automation
- ☐ How many users will the system support?
- ☐ *PT: Figure out what Tech is MOST important to you + build around that.*

- ☐ Find a community of users

- ☐ Are you bleeding edge or going with the flow?

- ☐ Assess cost (including integration discounts, contract length, other tools)

- ☐ MIU: MoneyBall Law

- ☐ Make a plan - According to a study by MIT Sloan Management Review and Capgemini Consulting – **63% of employees** said the pace of technology change in their workplace is too slow.

Mark:

Mmap or
Draw a
Picture
and Work
Though It



Document Management

- Break free from the documents



Google Drive



netdocuments



Document Management Solutions

How to Choose

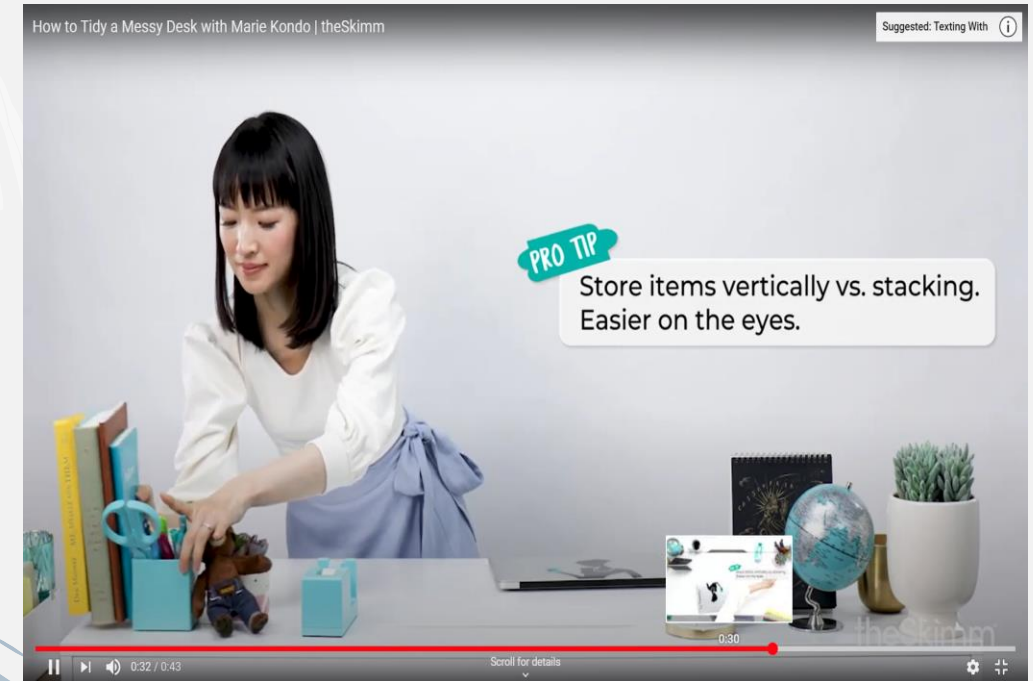
- ☐ Does it integrate with other applications
 - ☐ Is it secure? ONLY use PAID version
 - ☐ Is there a process for backups?
 - ☐ Can you share documents with third-parties (Clients, courts, experts)
- ☐ Assess cost
 - ☐ integration discounts, contract length, other tools



Document Management Solutions

Create a file structure and organize your files.

- ❑ Marie Kondo your files. Get organized
- ❑ Leverage other firms' structure
 - ❑ It will not be what you currently do! Prepare for change!



Communications

- Phone Providers
 - Vonage
 - Google Voice
 - RingCentral
- Video Conference Providers
 - Zoom
 - Teams
 - Webex



Firm Processes

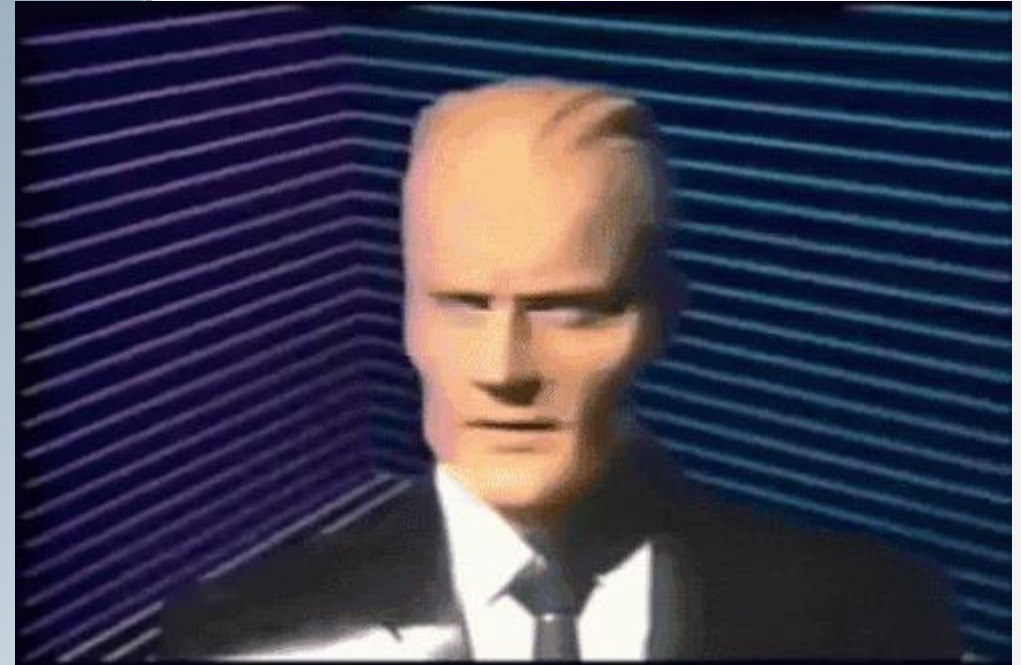
- Where are you currently tied to your desk and how can you improve?
- Find a Virtual assistant/Virtual CPA/Virtual IT to support your new firm
- Develop Remote desktop solutions for key staff on firm networks
- Determine your Paper management Process
- Schedule your time to support efficient virtual operations

HOW TO START



Ready to go virtual

- **Digitize your documents** and resources.
- **Review your current tools** to determine what you can leverage without any change.
- **Find changes** that can result in more efficient customer service, and higher ROI
- Contact **other “virtual” attorneys** to leverage their lessons learned.
- **Plan a deadline** for implementation.



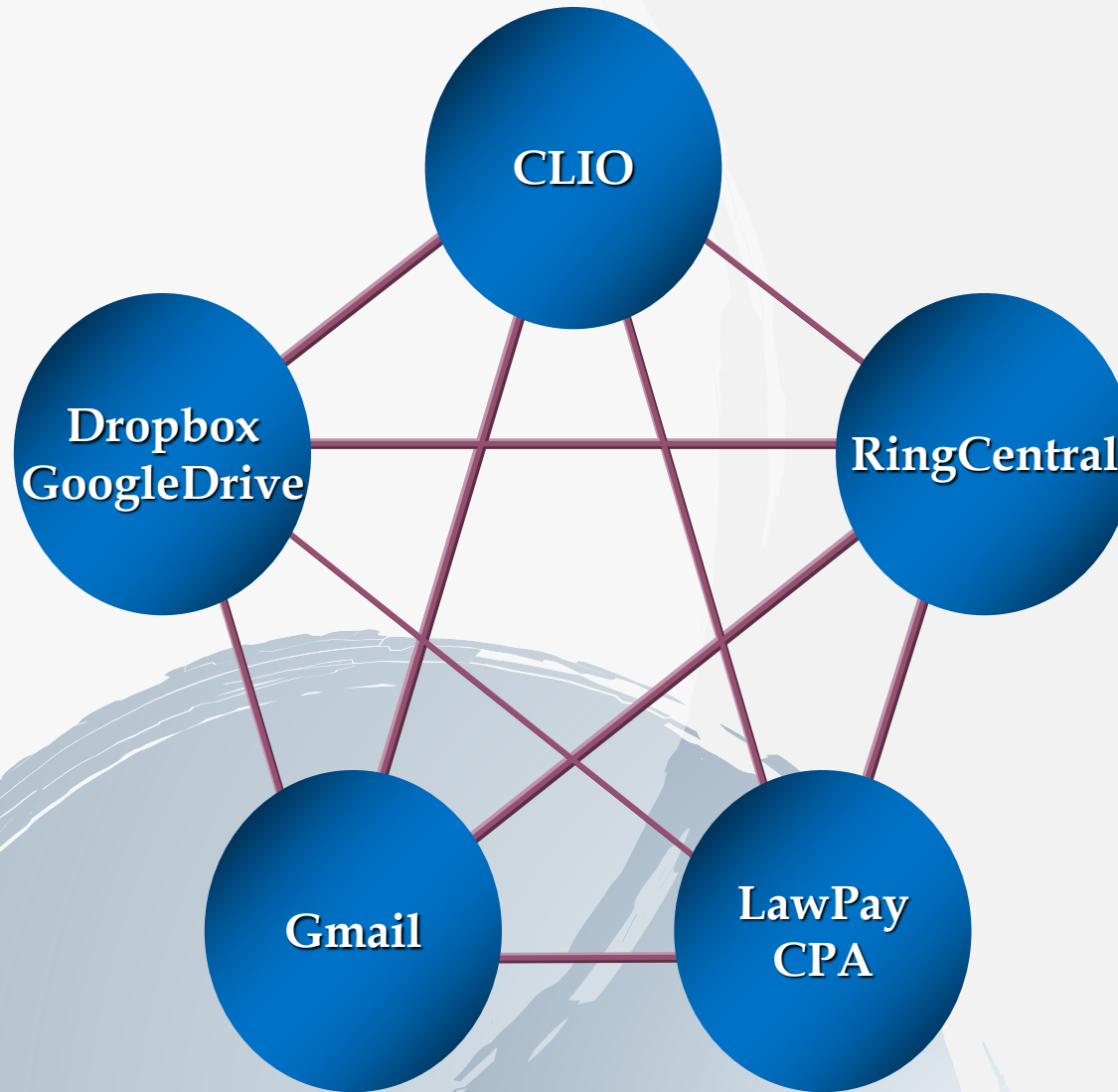
The Virtual Law Office Systems relationship

Mitch's setup and Key Features



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START TODAY

**VIRTUAL
TOMORROW**