



# NAKIA GRAY

*Attorney. Brand Strategist. Serial Entrepreneur.*



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# Introductions

- *In case you're wondering who the heck I am...*
  - Serial entrepreneur
  - Attorney
  - Mom
  - Wife
  - UMES - undergrad
  - Howard - law school
  - American - master's in communications
  - AKA - PINK & GREEN
  - Beyonce is my BFF
  - Why I transitioned from a solo to a managing attorney

# WELCOME

- *A little housekeeping...*
  - I will go through the slides
  - Take notes and ask questions
  - I will also take questions at the end
  - **\*\*If you ask a question, please tell us your name, where you practice, and your practice areas.**

# Today's agenda

- Introduction and welcome
- What is a Virtual Assistant?
- What types of tasks can be (and/or should be) delegated?
- What are the benefits & risks of having virtual staff?
- Where to go to find virtual staff
- Using contract attorneys to scale your practice
- Important considerations when entering into of-counsel/contract relationships
- Q & A

# What is a virtual assistant (VA)

- A virtual assistant is a person who provides support virtually (wherever they are located)
- They work remotely and can be as hands-on or hands-off with your business as you desire (behind the scenes)
- They are typically freelancers/independent contractors, although they don't necessarily have to be
- Often times they have more than one client/attorney that they are supporting
- They can work flexible hours with flexible payment options

# Different types of virtual assistants

- General admin (calendaring, phone calls, setting appointments, letters, email management etc.)
- Marketing (follow-up, social media, blogging, CRM management)
- Technical (website design and maintenance, webinars, podcasts, graphic design)
- Paralegal (discovery, draft motions and pleadings, etc.)
- Financial (accounting, bookkeeping, trust accounting, payroll)
- Business management (operations: HR/marketing/finance/business development/publicity)

# Which tasks should attorneys delegate?

- Telephone answering
- Client intake/appointment scheduling
- Billing/accounts receivable/bookkeeping
- Social media/blogging
- Website maintenance
- Client relations (customer service)
- Legal assistant/paralegal duties
- Business development/Marketing/PR services
- CRM/potential client follow-up

# What are the benefits of having a virtual staff?

- Less stress
  - You simply have too many hats to wear and you can't do it all
- More money (trust me, they pay for themselves)
  - Tax savings (consult your tax professional re benefits (health, life, disability, retirement, etc.))
  - They can be as inexpensive as \$3/hour or go up to \$50+/hour.
  - When done properly they should actually make you money
- Greater perception among clients
  - Potential growth opportunities
  - You look like you're running a real business which attracts better quality clients
- More fulfilling practice
  - Focus more on practicing law
  - Reduced chance of malpractice claims with more than one set of eyes



# What are the risks when hiring virtual assistants?

- Accountability
  - Put policies in effect to ensure productivity
- Labor law/employment risks if they aren't independent contractors
  - Consult an employment attorney to discuss employees vs. independent contractors
- High turnover (they aren't always loyal)
- Security/client confidentiality breach
  - If they are dishonest they may steal from you or clients
  - Truth: This could happen whether they are in person or virtual. It's a cost of doing business

# Where to find virtual staff?

- [upwork.com](https://www.upwork.com) (My personal favorite)
- [freelancer.com](https://www.freelancer.com) (general VAs - all categories)
- [fiverr.com](https://www.fiverr.com) (everything from powerpoint to logos to research and article writing for \$5)
- [atlasvirtualparalegal.com](https://atlasvirtualparalegal.com)
- [99designs.com](https://www.99designs.com) (logo and graphics)
- [guru.com](https://www.guru.com) (great pool of admin and paralegal support)
- [virtualparalegalservices.com](https://www.virtualparalegalservices.com)
- [thevirtualparalegal.com](https://www.thevirtualparalegal.com)
- [starrparalegals.com](https://www.starrparalegals.com) (bankruptcy specialty)
- [flex-counsel.com/](https://www.flex-counsel.com/)
- [equityva.com](https://www.equityva.com)
- Off-line options:
  - local colleges
  - former places of employment/courthouse clerks
  - social media

# Scaling: Use Contract Attorneys

- There are only so many hours each week
  - As a solo, your income is capped at the number of working hours each week x your hourly rate
- If you want more money or more time *{or both}* you MUST have another producer
  - Contract attorneys give you an additional producer(s) without the commitment of an associate
- You can use contract attorneys to open up a new market
- Or to handle a different practice area
- Or to handle an influx of cases in your primary practice area
  - Find what works for you

# Key considerations

- Checking for conflicts
- Malpractice insurance
- Client approval/retainer agreement
- Fee splitting/hourly rates
- Independent contractor status
- Court appearances v. behind the scenes
- Terminating the relationship

*Questions? Let's discuss*



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Connect with me online and on  
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