ESSENTIAL TECH, TOOLS & TALENT

FOR RUNNING A SOLO & SMALL LAW PRACTICE, REMOTELY

Official Presentation of the Smith.ai Educational Series

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Maddy Martin is the head of growth and education at Smith.ai, which provides small-business communication services, including their virtual receptionist and intake service, web chat, and text answering.

The vast majority of Smith.ai clients are solo and small-firm attorneys.

WHAT WE'LL COVER

- Law firm practice needs & constraints
- Potential problems of remote work
- Solutions to remote work
  - Software
  - Services
  - Systems & Habits

- Task management
- Case/practice management
- Case alerts
- Time tracking
- Email systems
- Calendaring
- Billing & Payments
- VoIP/Cloud phone systems
- Virtual receptionists
- Virtual assistants & paralegals
- Freelance lawyers & law clerks

HOW WE'LL EVALUATE

These systems must:

- Be **affordable** (without commitment)
- Be **adjustable** (budgets & priorities change)
- Be **customizable** (at the start & ongoing)
- Be **easy** to use & monitor
- Be **comprehensive** (one provider: fewer bills & mgmt)
- **Integrate** with your processes, systems & software
- If human, have reasonable **discretion** (as someone in-house would, from blog writing to call answering)

WHY IS THIS IMPORTANT

Immediately:

- COVID-19 triggered

Long term

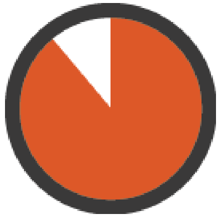
- Cost reduction
- Business continuity
- Staff retention in the "new normal"

HOW THIS APPLIES TO YOUR PRACTICE

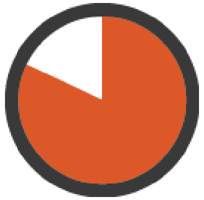
USE THIS COURSE TO CREATE:

- Policies and Procedures
- Disaster Recovery Manual
- Employee Handbook
- Marketing Plan
- Crisis Communications Plan
- Succession Plan
- Merger, Sale & Acquisition Documents

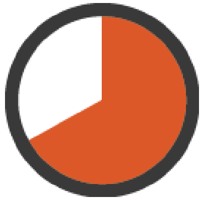
Consumer Buying Statistics Affecting Law Firms



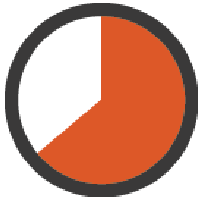
89% of consumers expect an immediate response to a customer service issue



82% of consumers expect an immediate response when inquiring about services



67% of law firm clients say their "decision to hire" is most influenced by an attorney's initial responsiveness to their first call or email



64% of legal consumers look for an attorney who offers a free initial consult

What blocks remote management & communications?

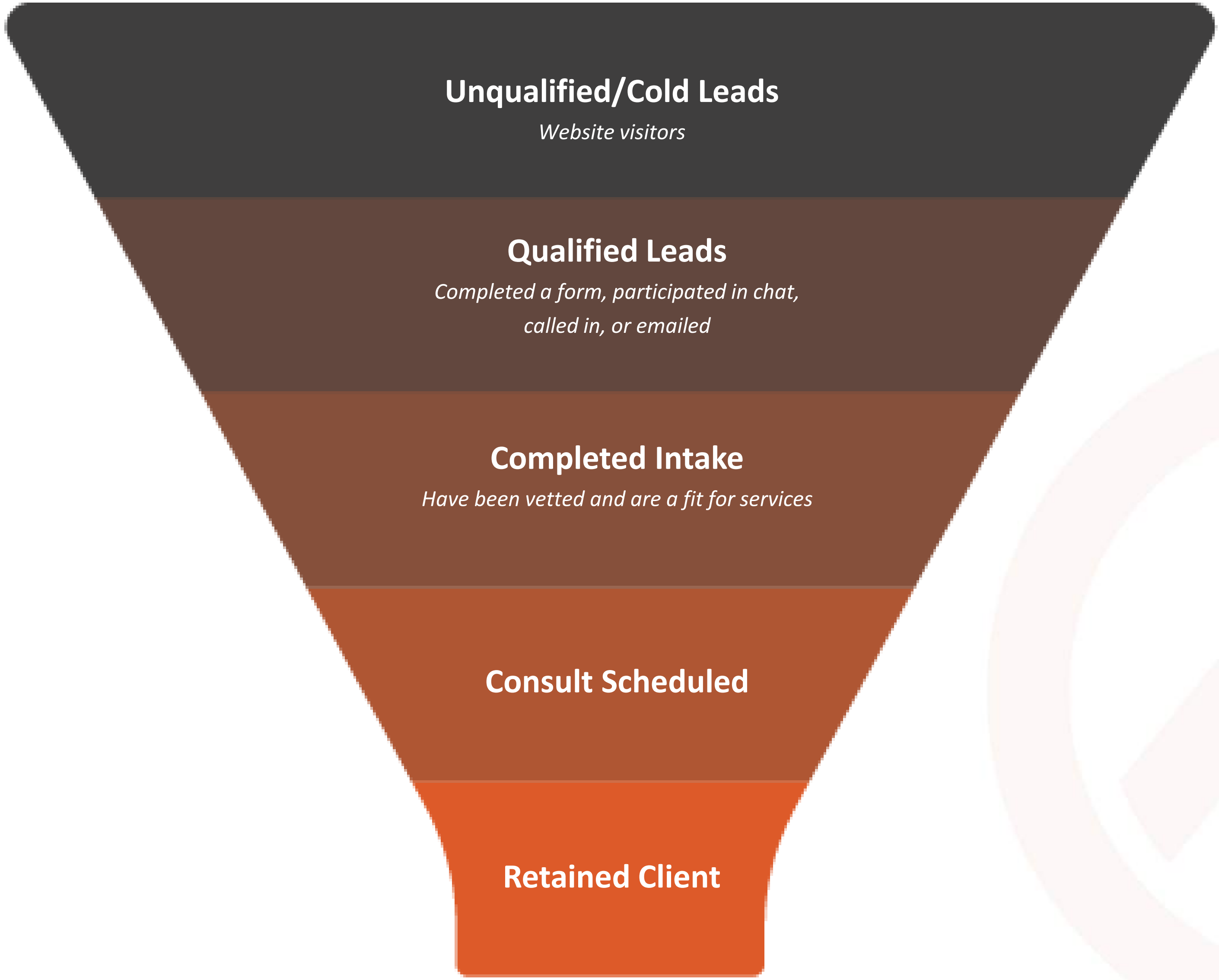
The 2017 and 2018 Clio Legal Trends Reports uncovered staggering daily averages of the actual time allocations recorded by solo practitioners and small law firms.
Consider how these are further affected by remote work & disruptive events.

2 hours lost to recovering from interruptions

1.9 hours spent on billable work

2 hours spent on business development

2.9 hours spent on admin tasks


Unqualified/Cold Leads
Website visitors
Qualified Leads
Completed a form, participated in chat, called in, or emailed
Completed Intake
Have been vetted and are a fit for services
Consult Scheduled
Retained Client

PROBLEM ①

COMMUNICATION GAP

Mismatched expectations contribute to this predicament. Lawyers lack understanding of the client experience and its impact on their firms' growth:

POTENTIAL CLIENTS	LAWYERS
82% expect an immediate response to a new inquiry	**39%** of lawyers let calls from potential clients go to voicemail
67% base their "decision to hire" on a firm's initial responsiveness	**78%** never responded to a potential client's outreach
57% contacted more than one firm when shopping for a lawyer	**42%** can prevent potential clients from contacting another firm, if they're liked by prospect

What inhibits lawyers' ability to meet clients' needs is rooted in misunderstanding clients' motivations for contacting a lawyer to resolve an issue or matter, in the first place:

POTENTIAL CLIENTS	LAWYERS
39% feel "urgency" to hire a lawyer	**15%** sense clients' "urgency" to hire a lawyer
51% feel "relief" as the #1 emotion when hiring a lawyer	**17%** sense clients "relief" as a part of the experience of hiring a lawyer


Whether "growth" means more revenue or efficiency, both outcomes demand resources:
1 TIME
2 ENERGY
3 MONEY
4 SKILLS
Lawyers are rarely positioned to drive growth by themselves. Despite 92% reporting confidence in their legal skills, business-side realities are not in their favor:
TASK
76%
are overworked
69%
have no business training at all
93%
say law school did not prepare them to run the business side of a law firm.
53%
are confident in their business skills

CAPACITY LIMITATIONS RESULT IN LOPSIDED ALLOCATIONS OF TIME.

Worse still, all of this time spent on firm operations and communications isn't producing positive results. Despite spending on average 2 hours/day on business development work, the rewards are not proportional to their efforts.

ADMIN WORK

BILLABLE HOURS

IN 2019 LAW FIRMS STILL...

IGNORE CLIENTS

56% of phone calls are answered

SCREEN POORLY

58% of consultations don't result in a new-client retainer

LOSE DEALS

68% of leads communicated with a lawyer they didn't hire

MISS REVENUE

70% of billable work gets collected...

-$53,000 ...just 1.7 hours per day of the 2.5 hours worked — a loss of $53,000/year based on the average billable rate of $253/hour!

Responsiveness is measured not only by speed. The content and channel of the response matter, too. An effective response is timely, substantially informative, and accessible through multiple communication methods, such as phone, text, website, email, and social networks. To attract and retain clients, law firms must respond to clients where they are.

RESPONSIVE LAW FIRMS ARE:

FAST	HELPFUL	AVAILABLE
A timely response is the #1 most important factor to potential clients seeking a lawyer.	At least 74% of potential clients want to know what to expect in terms of cost, duration, or process.	68% of potential client emails received no response or a request to call the firm instead.
Further, 64% of consumers who contacted a lawyer they didn't hire said the firm simply didn't respond.	*Yet over 61% of potential clients didn't get enough of this information, and cited "lack of information" as the specific reason for not hiring the firm.*	*Information is meaningless if it's not available on the channels clients prefer.*

Task management

Slack - This is for team chat. It's web-based, for daily conversations. It includes calls, video calls, and screen sharing.

Free to use, but we highly recommend paying the ~$7/user/month because you definitely want the full access to conversation history that paid plans give you.

Clubhouse - This is a project management tool that we use internally at Smith.ai. It's not for case management, but more for business, marketing, and other projects.

It's free for up to 10 users.

Task management

Note: With respect to combining Slack and Clubhouse: These programs work well together, and that's part of why we recommended them as a pair.

They integrate; so, for example:

- You can start discussing a project in Slack and link to it in Clubhouse for reference, or
- You can come up with a project in Slack during a team discussion, and then create a task in Clubhouse for it directly from the click of a button in Slack, and even assign its owner and due date under a specific project.

Case & practice management

Clio, Filevine, Practice Panther, Rocket Matter, and Lawmatics

Just a few of the law firm and client management tools we see most often used and liked by our clients, options abound.

You can only get away with spreadsheets for so long until you need a relational database that tells you what's happening at your firm, what work needs to be completed, what's held up (and by whom), and so much more.

Many of these systems, like LeadDocket, now also include sophisticated email, intake, and calendaring systems, and some, like Cosmolex, also include robust accounting tools.

See: CRMs that have an open API for easy integration.

Case alerts

Casestatus - This deserves its own category because it's often overlooked and deserves more attention.

If your clients call you for updates or neglect to return documents on time (or push it to the last minute, causing unnecessary stress), this is the tool you need. It proactively updates clients and reminds them about their case, building good habits for them and reducing interruptions for you and your team.

The cost is per-case as a flat-rate, and the company recommends you pass the cost on to clients.

Time tracking

Accelo - This tool includes email, meetings, and tasks in their tracking capabilities, and a lot more. There is an overview here and an interesting article on the revenue-impact of email tracking here. They receive very high marks on Capterra, too.

Timely - The AI-training component built into Timely means it learns and tracks better as you use it.

Email Stopwatch - For Outlook users only, this is a well regarded work timer.

PayDirt - This one helps you identify which specific client is related to the email you're working on, reducing the time spent tagging time to the correct client.

TimeMiner - This smart app integrates with RingCentral, Clio, Gmail, and Outlook. It tracks time spent on calls, texts, and emails, and it also mines time spent in the past on those activities, which makes it quite comprehensive (it even integrates with client invoices). But, its narrow focus on those four programs lessens its utility if those aren't programs you're already using (or likely to start using soon).

Email systems

Front - This is a great tool for assigning and monitoring emails. It is also an email collaboration tool. Pricing starts at $9/user/month.

Gorgias and TextExpander
Front has canned email responses you can save as templates and share with your team, but Gorgias and TextExpander also work outside of your email (Gorgias for Facebook, LinkedIn, and other channels; and TextExpander for SMS, legal document generation, etc.)

These solutions help your staff use the same approved responses, correctly worded, so your team represents your law practice accurately, every time, no matter the communication channel.

Gorgias is free; TextExpander is ~$3-8/user/month.

Calendaring

Calendly and Acuity - These scheduling tools work with any calendar system you're currently using (Google, Office365, iCloud, Outlook). Both have free options, but you'll end up likely needing a paid plan at $8-15/user/month to support multiple calendar types, consultation fees, intake questions, etc.

ScheduleOnce - Time-tested and just $5-10/user/month, this one is ideal if your calendar shifts often. You can use their Booking with Approval function so people can select 3 times, and then you pick the one that's best for you.

ClientRock and LawTap - These legal-specific calendaring tools offer features lawyers will appreciate:

The ClientRock Scheduler is a stand-alone appointment booking solution that integrates with LawPay to charge for consultations, and it can even draft your fee agreements and set up a client portal if you use ClientRock for payment management, as well. It's priced at $10/user/month and the full system is currently available for early access pricing at $49/month.

If you're looking to increase your visibility online, take a look at LawTap, which not only provides online calendaring inside a complete profile page, for $20/attorney/month, you also get listed in their attorney database where potential clients can find and book attorneys online.

Calendaring

Note: Any scheduling tool worth its salt these days allows you to add in questions before booking, accepts credit card payments, and offers email follow-ups so people are prepared with the information they need to have a productive meeting.

The solutions above satisfy those requirements. You can review more scheduling tools that lawyers and other business owners prefer on the Smith.ai Scheduling Integrations.

Doodle has fully featured free plans, and is used for polling individuals' availability for a group meeting. It's especially useful for setting meetings with 3+ people, particularly those you work with outside the office (think opposing counsel, consultants, co-counsel, etc.). No more back-and-forth hassle of coordinating

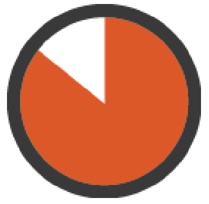
Billing & Payments

Xero, Quickbooks, and PayPal - For invoicing and general online payments, these three are trusted standards, easy to setup, and integrate well with other systems.

LawPay and Headnote - For lawyers specifically, these legal-specific payment processors can handle credit cards, debit cards, and echecks, and they're totally compliant and set up for IOLTA/IOLA/trust accounting.

Affirm, Square, PayPal, and Splitit - Split/installment payment plans for clients can be a wise solution for clients right now, who may be light on liquid assets. You can offer these options for this brief time, or make them a part of your firm's standard payment options permanently.

Be sure to check their fee structures and payout rules before deciding on one. Some offer all the payment upfront, despite the client signing on to an installment plan; others pay you upon receipt of each installment.



86% of a law firm's earnings are ever collected

VoIP/Cloud phone systems

RingCentral, Phone.com, and Nextiva

If you don't have a great VoIP phone solution already, we tend to recommend these three for tried-and-true connectivity. They all support business texting and run about $10-25/month/user. Adding a line for staff working from home is easy, and everyone on your team can add the VoIP company's app to their cell phone, so they have the portability they need right now, without disclosing their personal phone numbers.

Tip: If you have had a VoIP phone system for a while and haven't tested your call routing and call quality, do so now. Seriously, right now. And during work hours, have someone "secret shop" your business line. Latency, ring delays, and broken connections happen, and this is the easiest way to lose clients and never know (because they couldn't reach you). Give yourself peace of mind and check your phone system every few months to ensure it's functioning properly.

Virtual receptionists

Receptionist services like Smith.ai can work with any phone system you have, and many can accept all calls and then transfer to your team, or they can be your backup, if you have someone to answer, but they're not always on, since they likely have other work and personal tasks to attend to at times that cannot always be put on hold for an incoming call. The kids are at home; they can't always be put on "hold" so easily.

Look for services that can also make outbound calls, so they can call back leads who complete a website contact form, clients who need a court date rescheduled, directions for a deposition that's now being held online via Zoom, etc.

Consider omnichannel solutions, too, so at least website visitors and Facebook visitors get a helpful and prompt response even when your budget and bandwidth are tight.

Virtual assistants & paralegals

Lawfecta - Starting at a special price of $50/hour right now, Lawfecta's seasoned legal secretaries, assistants, and paralegals help scale a firm on an as-needed basis, when the idea (or reality) of paying for a salaried staff member is untenable or inadvisable. Stay in budget, and on task, with help from a team where every assistant has at least 10 years of relevant experience and specializes in legal work.

OT Paralegal Services - Also staffed by paralegals with 10+ years of experience, OTPS rates max out at $50/hour and that's for more substantive projects by certified paralegals. Most of their rates are $25-35/hour, and that can include billing, invoicing, bookkeeping, social media management, in addition to standard paralegal tasks. They also have a 15% sale running until at least June 1, 2020, for law firms affected by COVID.

Pacuska Professional Services - Allison Pacuska has contributed to this blog many times, and is a trusted resource to many law firm owners needing remote help with paralegal work. Read her tips on working with remote legal assistants to get a better sense of the tasks you can hand off, when you're used to running solo, but very clearly need an extra hand.

Freelance lawyers & law clerks

Think of these services in two main ways:

1. Get help or
2. Make money

Considerations

- Supervisory responsibilities
- Don't outsource what you don't know and can't supervise

See: LAWCLERK.LEGAL (recent project examples, at right) and LawyerExchange

ESTATE PLAN LAWYERS ARE SUCCESSFULLY OUTSOURCING!

- Deeds - $150
- Marketing blog - $150
- Draft will and powers of attorney - $200
- Research ancillary probate - $250
- Testamentary trust analysis memo - $250
- Prepare accounting report - $300
- Memo re Trustee capacity - $300
- Journal article on guardian ad litem - $350
- Case law and probate code research - $400
- Estate plan review and summary - $400
- Propound discovery - $450
- Draft revocable trust and will - $600
- Tax research and memo - $1,000
- Supreme Court writ in probate matter - $1,200
- Draft Nevis asset protection trust - $3,000

Eisenhower Decision Matrix

EISENHOWER DECISION MATRIX

TASK TO DELEGATE	STAFF / TECHNOLOGY / SERVICE

Law Firm Marketing Cost of Acquisition (COA) and Return on Investment (ROI)

CONVERSION METRICS	COST AND REVENUE	MARKETING COA & ROI
1,000 Visitors	$5,000	$5.00 Visitor
80 Leads		$62.50 Lead
40 Qualified Opportunities		$125.00 Opportunity
20 Consultations		$250.00 Consultation
10 Retained Clients	$20,000	$500.00 Client

IDENTIFYING OPPORTUNITIES FOR AUTOMATION

GOAL

Confront the time you spend daily on the most common law firm tasks.

INSTRUCTIONS

In the table below, write down the percentage of time you are currently spending on each type of task or business process.

% OF TIME	STAGE	TASKS
	Lead Generation	
	Client Intake	
	Case Details	
	Correspondence	
	Word Processing	
	Delivery/Decision	
	Completion & Referrals	

Increase Marketing ROI and Conversion Rates by Improving Responsiveness

EXAMPLE: LAW FIRM MARKETING COST OF ACQUISITION (COA) AND RETURN ON INVESTMENT (ROI)

CONVERSION METRICS	COST AND REVENUE	MARKETING COA & ROI
1,000 Visitors	$5,000	$5.00 Visitor
110 Leads		$45.45 Lead
55 Qualified Opportunities		$90.00 Opportunity
27.5 Consultations		$180.00 Consultation
13.75 Retained Clients	$27,500	$360.00 Client

REINVESTMENT OF REVENUE

WHERE WILL YOU APPLY PROFITS AND SAVINGS?

REINVESTMENT AREA	BUSINESS/PERSONAL BENEFIT	COST
		$
		$

CONSIDERING YOUR INTAKE PROCESS

Form

Website visitors enter a request for information

Contact Record

A record is created in your CRM or CMS

Case File

Once qualified, a case is created for the client

INTERMEDIATE INTAKE PROCESS

PNC visits website

Website chat available to answer questions

PNC explains their need and inquires about services

Contact details collected. 'Fit' assessment determines next step.

Contact logged in CRM

Consult scheduled by chat or booking link sent by email

Appointment reminder (phone, email, or SMS)

Conflict check assigned to staff

Consult (and conflict check) completed by attorney or staff

Intake form sent by email, and completed

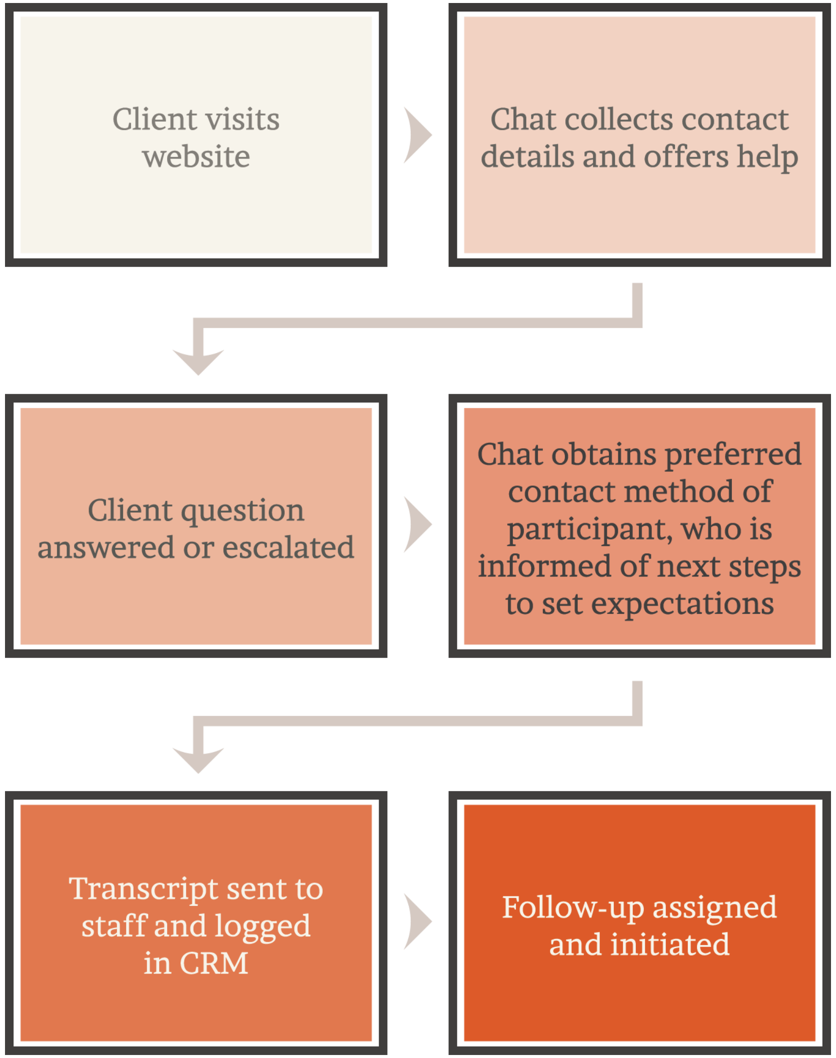
Agreement signed and retainer payment completed

Case work begins

Advanced Intake:
Potential New Client (PNC)

1. PNC visits website
2. Website chat available to answer questions
3. PNC explains their need and inquires about services
4. Contact details collected. 'Fit' assessment determines next step.
5. Contact logged in CRM
6. Consult scheduled by chat or booking link sent by email
7. Email 'nurture' drip initiated to PNCs who do not schedule a consult
8. Appointment reminder (phone, email, or SMS)
9. Consult (and conflict check) completed by attorney or staff
10. Intake form sent by email, and completed
11. Agreement signed and retainer payment completed
12. Case work begins
13. Recurring invoice set up through online payment software
14. Client reminders, court dates, and work status check-ins scheduled via online calendar or CMS
15. Case work complete. Exit interview scheduled.
16. Review requested from highly satisfied clients.

Automated Communication for Clients with Chat Services



STEP 1:
Automating with Intake Forms

EXAMPLE
Intake Form

FORM SECTION	FIELDS
Contact details	Name, address, phone, email
Case details	Date of accident, court date, marital status, names of other parties involved
Financial details	Annual income, employment status
Payment preference	Credit card, cash, check, ACH, payment plan
Expected time to close (urgency)	Considering options, urgent, 2–3 months, 6 months, within 1 year
Case value	$_______________
Source	Google search, Facebook, individual, organization
Other	Police report, damage photos, doctor, insurance

EXERCISE

STEP 1:

CREATE YOUR IDEAL INTAKE FORM

GOAL

Standardize data collection to consistently capture, qualify, and route PNCs.

INSTRUCTIONS

Within each section, add the information you need to collect to effectively and efficiently screen PNCs.

FORM SECTION	FIELDS
Contact Details	
Case Details	
Financial Details	
Payment Preference	
Expected Time to Close (Urgency)	
Case Value	
Source	
Other	

VIRTUAL RECEPTIONIST & CHAT BEST PRACTICES

Share Your Calendar & Availability

Immediately update teams upon changes to your availability

Most Smith.ai customers tell us they don't want another app to install, so, we let our clients update their availability via SMS. This system works well when you're delegating scheduling tasks to staff members internally, too.

Text updates when:

- You're unable to accept call transfers
- When to contact your partner instead of you
- When to bypass the receptionist and ring you directly

… and more urgent directions,
for in-the-moment call-handling changes

Email upcoming changes to your availability

SMS updates work best if your status is changing now (you're busy for the next 4 hours), but, for future updates, email updates are preferable.

For example, you may want to say:

- 'I'll be in court tomorrow after 1:00 pm, so don't try to transfer calls to me'
- 'Tell my clients I'm on vacation next week'
- 'Reschedule all of my calls on Wednesday'

Allow bookings for multiple appointment types

We schedule appointments for over 70% of Smith.ai clients using their own calendars. If a caller meets your criteria, we can get them on your calendar. But your staff or remote receptionists can go far beyond that capability.

Other scheduling types include:

- 15-minute 'callbacks' when transfers cannot be completed
- Current clients for court appearances
- Vendor check-ins on your managing partner's calendar
- Conference calls with multiple parties

… and beyond

STEP 2:

HOW WILL YOU SHARE YOUR CALENDAR?

GOAL

Document how, when, and what types of appointments should be scheduled for you, your partners, and your staff.

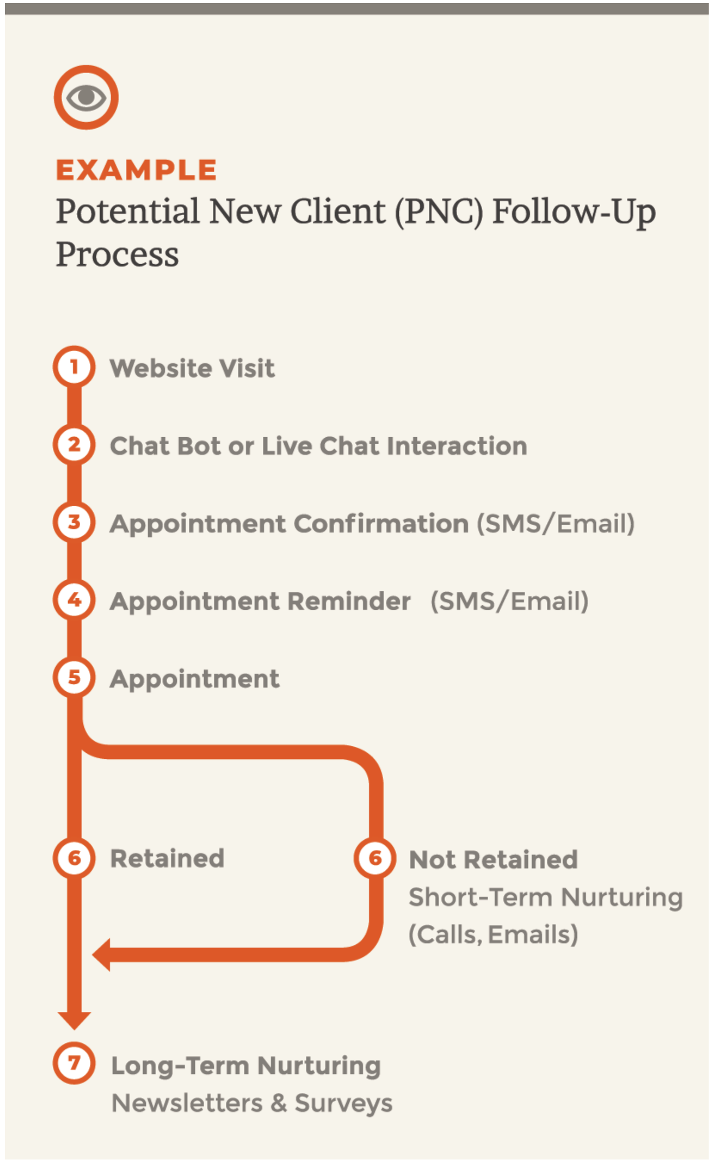
INSTRUCTIONS

To streamline your new appointment-booking and client-scheduling processes, outline how you will share your calendar.

MEETING TYPE	PERSON (OR JOB TITLE)	TIMING
PNCs		
Current Clients		

STEP 3:

Outlining Your Ideal Follow-Up Process for PNCs



Example: PNC Follow-up from Inbound Marketing with Remote Team

1
- PNC completes marketing form on website
- Email alert with completed web form details is generated to law firm

2
- Email is sent to receptionist service based on automatic forwarding rule
- Receptionist calls PNC to qualify; schedules ‘good’ leads and refers ‘bad’ leads

3
- Scheduled appointments and conflict checks are completed by attorneys and staff
- PNC retains the firm immediately, or is added to lead-nurturing program for follow-up and conversion

TEMPLATES TO HELP YOU GET IT DONE!

Smith.ai's Law Firm Communication Library

Our Communication Library is a supplemental resource to this Law Firm Communication Playbook.

The library includes templates and guidance built on our experience handling nearly one million calls, chats, and other communications. It is tailored to law firms employing the following communication methods:

- Phone
- Email
- Website Chat
- Text Messages

The library contains a multitude of inbound and outbound communication scenarios faced by law firm owners, in-house staff, and outsourced teams like virtual receptionists. Scenarios include but are not limited to:

- Caller information collection
- PNC qualification
- Appointment scheduling
- Intake form completion
- Website form follow-up
- New client welcome email
- Unqualified PNC referral email
- Legal disclaimer for website chat
- Common FAW for website chat

Review these best practices, and then adapt them to suit the specific needs of your law practice.

Access Smith.ai's Communication Library:
smith.ai/law-firm-communication-library

Thank You

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REAL RECEPTIONISTS + MACHINE INTELLIGENCE

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