1. Set clear expectations with clients and staff

Properly preparing your staff and clients for the transition from an in-person law practice model to a remote work one starts and ends with (over) communicating.

Start by establishing remote work expectations and procedures with staff: which virtual communication channels to use, how deliverables will be submitted, and how meetings will take place. Let clients know far ahead of time that any in-person meetings may need to be moved to video.

Don’t stop at how you will be moving to remote work; tell them why the change is happening. This will help you gain buy-in and help your staff and clients see the transition in a positive light.
2. Make sure your staff is fully equipped for remote work

In order to make remote work a reality for your firm, your staff needs to have access to the appropriate equipment and technology.

- Make sure every attorney, paralegal, and office manager at the firm has access to a computer, strong internet, and telephone connection at home.
- Set up a remote-access VPN or cloud-based practice management solution to get secure access to all your firm data and files.
- Set up a chat and collaboration software such as Slack or Microsoft Teams for easy collaboration.
- Move in-person meetings with staff and clients to free Zoom or Google Hangouts video conferencing.

3. Keep a pulse on staff productivity

With the cancellation of in-person meetings, it’s harder to coordinate communication. Don’t lose time while you are working from home.

- Set expectations for regular updates, and be more communicative than usual in email, phone calls, Slack, or Microsoft Teams.
- Ask your team to start recording their time daily. This gives you peace of mind that the business is moving forward and helps your team capture more time contemporaneously.
- If you have non-billable staff and want to keep track of their productivity, require this staff to log calls and tasks performed daily. This ensures team members work on the most prioritized tasks and projects.
- Stay on top of your work and keep track of all incoming and outbound calls.
- If you’re feeling overwhelmed about how to find time to answer your calls, use a virtual receptionist service like Smith.ai so you can focus on casework and managing your team.
- Make sure that your staff retains the same standards for time and billing as you help clients remotely.

4. Pay attention to cybersecurity

Bad actors will sow discord with phishing and malware attacks to capitalize on the events of COVID-19. Now more than ever, your firm needs cybersecurity.

- Give employees access to a virtual private network (VPN) so they can establish a secure connection to WiFi from home. Many VPNs are available online or in the app store. Prices vary, but tend to be $20 per month: a small investment to ensure your firm’s cybersecurity.
• Use phishing reporting tools in Outlook and Gmail to block online attacks and alert the IT admin at your firm.

5. Stay in touch with your clients without being in-person

If you’re working remotely, you likely won’t be meeting with clients in-person. There are still many ways you can let them know that they’re top of mind

• Don’t cancel your meetings. Instead, transition your conversations to phone or video. This allows you to maintain your relationships with your clients while minimizing disruption.

• Send your clients secure emails or text reminders about upcoming trial dates, mediation, or document signings.

• Mention that although your firm is moving to a work from home workforce, it is still business as usual. You don’t anticipate any other changes that will affect them or their ongoing or future cases.

6. Give your clients the option to pay online

It’s likely that new business will slow in light of COVID-19. Even so, legal services are generally considered an “essential product or service” — and your clients will likely feel the same about your casework.

• Enabling clients to pay online with a credit card or eCheck is a great idea in these uncertain financial times. They will appreciate the convenience and may be looking to finance your services with a credit card instead of paying directly from their bank account.

7. Look for business development opportunities

During times of uncertainty, the legal community becomes an increasingly important part of society. Do not panic if business slows.

• Reach out to lawyers in your network and ask if they would swap referrals. Perhaps they are too busy and you need the work, or vice versa.

• Reach out to your local and state bar to see if they have a list of lawyers for the public if they are looking for legal service providers.

• Lean on your network and community for help during this hard time, and give help in return.

8. Use this lull in business as a chance to get organized

It’s increasingly difficult to remember what’s top-of-mind today — let alone what will be important a month from now.

• Taking the time to turn inward, organize your calendar, reach out to former clients, clear duplicates from your CRM, and adjust priorities will ensure that
your firm will be prepared once the situation subsides.

- Conditional workflows in PracticePanther help you plan ahead for that moment. They create due dates for tasks and events to keep your agenda organized and case management cycle flowing.

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