



21st Century Law Firm

D.C. Bar

Practice 360°

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attorney. brand strategist. infopreneur. speaker.



WELCOME

I'm glad you're here...

Ground Rules

First things

First...

Change your mindset. Embrace change.

Don't stress. Find what works for

YOU!

Our Agenda

- Welcome + Introductions
- What is virtual law practice (+ what it's not)
- Some background about me + my law firm
- Ways to incorporate virtual practice into traditional law practices
- Tools - Hardware
- Tools - Software & Applications
- Q & A

Background on Virtual Law Practice

- Not the same as virtual office space
- Delivery of legal services online
- Full service, integrated into traditional service, or document assembly/automation
- Unbundling of legal services
- Software as a service



About Me

& My Virtual Law Firm

Flexible Options for Owning a Virtual Business

Unbundling Services

- ★ Drafting agreements, contracts
- ★ Negotiation/Coaching and strategy
- ★ Limited appearance
- ★ Dispute resolution/mediation

Full-Service Practice

- ★ Family
- ★ Business Transactions
- ★ Criminal Law
- ★ Estate Planning
- ★ Litigation

Document Automation

- ★ Template contracts and agreements
- ★ Wills, advance directives, POAs
- ★ Entity formation documents

Ways to incorporate virtual law into your traditional law practice

- Drafting documents/agreements (unbundled services)
- Document assembly (estate planning or business formation)
- Consulting/case strategy; dispute resolution
- Providing templates/DIY resources (software and applications)

Must-have hardware

- Computer/laptop
- Tablet/mobile phone
- Scanner
- Hotspot (for location flexibility)
- Reliable wi-fi
- Quality camera/microphone

Must-have software

- Task management software
 - CLIO, Asana, MyCase, Google Calendar, Trello, Teamwork, Basecamp
- Appointment Scheduling/CRM
 - VCita, Acuity, Calendly, Contactually
- Client Portal
 - CLIO, MyCase, Total Attorneys, Abacus, DirectLaw
- Video Conferencing
 - Google Hangout, Skype, Zoom
- Cloud file storage
 - Google Drive, Dropbox, OneDrive, Box

Must-have software

- Electronic signing
 - HelloSign, 17Hats, Echosign, DocuSign
- Electronic Faxing
 - HelloFax, MyFax, eFax
- Online payment processor/invoicing
 - Stripe, PayPal, MyCase, LawPay, Infusionsoft, 17Hats
 - Invoicing (CLIO, Freshbooks, Quickbooks, Xero, MyCase, LawPay, 17hats)

Q & A