SOLO & SMALL FIRM PRACTICE TIPS

By: Patrick Slaughter
LaFevor & Slaughter

COMMUNICATING WHILE WORKING REMOTELY

Last time we discussed migrating your cases to the cloud. If you've done this, you're well on the way to working remotely – preferably from an exotic beach location or a theme park.

The next issue to address is how you will be able to stay in touch with everyone. The goal is for our clients, opposing counsel, and court personnel to believe that we are slaving away in our offices when we are somewhere much more fun.

The first hurdle is phone calls. Let's face it, we are on the telephone a lot. We have to talk to people to do our job. Cell phones make communicating easy, but most of us would prefer that our clients not have our personal cell numbers. We are using the app that comes with our Comcast telephone system. Using the app we are able to place and receive calls from our mobile phones using our office telephone number. So, when I make a call, it is like I am calling from my office. We can also forward our calls from the office to our personal phones the same way. My staff can even transfer a call that comes into the office line to my cell phone just like they transfer calls to my desk. Fielding calls remotely turned out to be easy and inexpensive. You might not have Comcast though; call your phone provider and see what they can do. They might have something that will surprise you (and it is usually free). If you need to find another service provider consider RingCentral, Vonage, 8X8, or Ooma.

Dealing with emails is another substantial part of our day. Most folks know how to get email remotely. The key is making sure those emails are available across devices. If you use a laptop, a desktop, a smart phone, and a tablet it can be pretty easy to have emails spread out over a bunch of devices. The easiest solution is to use an IMAP account with an email folder set up for each client file on your IMAP server. This way each device you use will share the same client matter email folder. Whenever you receive an email, you just drop it into that client's folder. The IMAP server will make that same email available across each device. Also, most of the practice management software programs can index emails from everyone in your firm regarding a matter based on each user's folder. That way you can look at every single email that has been exchanged between everyone in the office and a client when the need arises. This ability makes it easy to find documents and to verify or deny what has and has not been said or agreed to in emails with clients and other attorneys.

Now, let's talk about snail mail. You might think that you have to be at your office to receive the mail, open it, and scan it now that you have gone paperless, then forward it to your client. Believe it or not, you don't. There are services out there like Earth Class Mail, Traveling Mailbox, and Post Scan Mail that will receive all your snail mail, scan the envelope, and email the scan to you so you can decide whether to open the mail or not. After that, they open your mail, scan it into a searchable PDF document, and email you the PDF. These services make dealing with physical mail easy and are very affordable. Imagine the time you and your staff will save dealing with all the mail that comes to your office. These kinds of services save time and make it easier to go completely paperless.

Now that you have processed all your incoming mail, you must get it to your clients. We use the client portal feature in Rocket Matter (our practice management software), but there are tons of programs out there to choose from and most provide some kind of client portal feature at no additional charge.

The portal has been very popular with our clients. When a client engages our firm, they immediately receive an invitation to join the portal. Once they sign up, we can drag and drop documents into the portal. The client then receives an email telling them that a document is in their portal. They can read, save or print the document. Clients like it because they get the information much faster and in a more private fashion. We like it because it is easy for us to get the clients the documents they need, and it saves us a bunch of money on postage.

Another important practice management software feature is "cloud based" software. We are able to access Rocket Matter from anywhere in the world as long as we have an internet connection. We can work from anywhere. Wherever we are, we just log into Rocket Matter. We can bill as we work, keep track of calendar events, update our clients' portals with new documents as necessary, and run bills with very little effort.

Whichever practice management program you choose, spend a weekend watching as many of the tutorial videos that you can. Get to know what the software can do. Then get to know the folks that operate the support line. This way, they will know what you need, why you need it, and how to help. Don't be shy, these folks can make recommendations and suggestions to help you get more out of their software.

So now you have the beginnings of a paperless office and a plan on how to communicate with everyone who is still chained to their desks. Next month we will deal with how to make sure things get done, bill appropriately, get your bills out, and get paid all while standing in line for Flight of Passage in Disney's Animal Kingdom. With an average wait time of 4 hours, you should be able to get a lot done and get paid to stand in line!