Solo But not Alone: How to Assemble Your Virtual Practice

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What Questions do You want answered?

• What:
  – Issues
  – Topics
  – Questions

• do you want answered to make this session a HIT?

• Speak up now!!!
Let’s Make this InterActive!!!

• Please don’t hesitate to add a comment, suggestion or ask a question!
• Aiming at sharing some ‘out of the box’ ideas!
• The more we share today, the more we all get out of the day!
On with the Presentation!!

- The world hates change, yet it is the only thing that has brought progress.
  
  [Charles Kettering](https://www.nps.gov/mima/education/quotes.htm)
Agenda

- Introduction To Virtual Teams
- Considerations In Moving To Virtual (As Opposed To In-person) Teams
- Hurdles To Consider And How To Handle Them
- What Tools Are Available To You?
- Ethics, Privacy and Security Considerations
- Pulling Together Your Virtual Team Plan
- Conclusions
- Virtual Lawyers And Resources
Introduction To Virtual Teams

• Solo Lawyer was a breed apart...
• Legal rebel going it alone to the battlefields for his/her client.
Well times, as Bob says, they are a’changing..

- The Solo lawyer still wants to be *fiercely* independent but...
- The Internet means that they no longer have to be alone.
- With new collaborative tools:
  - they can bring together people into virtual teams
  - & practice in ways never before possible as a solo
Who is on Your Team?

• Support:
  – assistants,
  – bookkeepers,
  – IT support,
  – accountants and others
  – on an as-needed basis
Who is on Your Team?

- experts
- contract staff
- litigation support personnel or providers
- legal research
- second chair lawyer ...
Benefits of a Virtual Team

• Low overhead
• Commuting times cut to a minimum
• Work in a largely paperless office
• Have a mobile office since all you need is an Internet connection to work.
Concerns...

• Security & Privacy issues
• Legal, ethical and
• Technical issues as well.
• Do you host your data on your own servers (using such tools as Microsoft Sharepoint to create a private cloud)?..or
• Do you use applications such as PBWorks and practice virtually using a public cloud application?
Benefits...

• Can be more responsive to your clients...
• Assemble a virtual team quickly to ramp up for a big case or closing.
• Achieve a better work/life balance
• Accommodate lawyers who would have otherwise left the profession over family/work issues. Win-Win!
• As a solo with a virtual office, you can now tap into previously inaccessible talent pools.
Join Virtual Organizations...
Become a New Kind of Rebel...

• Gives rise to certain risks of carrying on in practice
• Going beyond the traditional boundaries of the legal profession.
• Are a new kind of rebel
• Threatening to some who have a rather more conservative view of how law should be practice
• Not all jurisdictions see virtual law practices as being fully in alignment with:
  – the traditional foundations of practice,
  – ethical rules,
  – regulations and such.
• We will explore some of the benefits as well as the potential difficulties that you may encounter by moving to this new and exciting way of practicing law.
Considerations In Moving To Virtual (As Opposed To In-person) Teams

Decide the type of virtual office you desire:
- (Almost) Entirely web-based
- Adjunct to a bricks-and-mortar office
- Different considerations apply when trying to create your team
- Truly web-based are more fluid, less connected and less cohesive
- Need to give thought to team-building “exercises” to draw people together
  - Recognize that those that work remotely may not want to come into the office to meet the rest of the team
Hurdles To Consider And How To Handle Them

• How comfortable are you and your virtual team members with technology?
• Are you disciplined enough to work without a standard routine?
• Without – *people* – around?
• Can you work alone - in solitude?
• -Or- will *Twitter and Facebook* become too much of a distraction???
What Tools Are Available To You?
Which of the following would best describe your technology skills?
Virtual Office – Example 1

Working from Home

Internet
Virtual Office – Example 2

Cloud-based Solution

Clio
RocketMatter
Firm Manager
Virtual Office – Example 3

Virtual Platform

DirectLaw
Total Attorneys VLO
DirectLaw

Client Portal

Attorney Dashboard

Sample Firm MyLegalAffairs

Sample Firm MyLegalAffairs - Legal Documents

Unpurchased Documents

- Accident Report Form 3/21/2012 Communicate
- Acknowledgement of Resignation 3/21/2012 Communicate
- Texas Divorce 3/21/2012 Communicate
- Marital Settlement Agreement 3/21/2012 Communicate

Submitted Documents

- Marital Settlement Agreement 3/21/2012 Communicate
- Texas Divorce 3/21/2012 Communicate

Document Preparation

- Quick search
- Filter by status
- Show all

Document Name  | Status  | Files | Order Number | User   | Last Action |
---              |        |      |             |       |            |
Marital Settlement Agreement  | Submitted | 0     | Test         | Gregor Weeks | 3/21/2012 |
Texas Divorce  | Submitted | 0     | Free         | Test       | 3/21/2012 |
Accident Report Form  | Submitted | 0     | Free         | Test       | 3/21/2012 |
Acknowledgement of Resignation | Submitted | 0     | Free         | Test       | 3/21/2012 |
Bad Check Notice  | Submitted | 0     | Admin        | pamandrews1@gmail.com | 3/19/2011 |

Note: For security purposes you will be logged out at 3:37:07 if your computer is inactive for 2 hours.
Total Attorneys – Virtual Law Office
Ethics, Privacy & Security Considerations

- Regulations/ethics rulings
  - “bona fide” office rule – ie New Jersey
- "A 'virtual office' cannot be a bona fide office since the attorney generally is not present during normal business hours but will only be present when he or she has reserved the space"
- "Moreover, the receptionist at a 'virtual office' does not qualify as a responsible person acting on the attorney's behalf who can answer questions posed by the courts, clients or adversaries."
Ethics, Privacy & Security Considerations

• Jurisdiction issues
  – Personal information and privacy laws

• Professional responsibility requirements
  – Location of books and records
Ethics, Privacy & Security Considerations

• Security Considerations
  – Yours and your team members
• Records Retention
• Risks:
  – Some remain the same regardless (maintaining confidentiality)
  – Some disappear (such as the risk of destruction of paper records by fire)
  – Some emerge (such as the deletion of the data on the servers by the cloud provider).
• Important to under the risks and plan for them.
• Of course your office has to be mobile...
Pulling Together Your Virtual Team Plan

• Start with the creation of the virtual team
• You need to build relationships and trust in your virtual teams.
• Determine what platform the virtual team will use
• Define the service-level goals and reporting mechanisms
  – time and reporting sheets
Pulling Together Your Virtual Team Plan

• Develop virtual team leadership and management skills
• Keep the team informed, involved and engaged
• Don’t forget non-online ways of remaining engaged
  – Pick up the phone and touch someone!
Conclusions

• Virtual has its benefits
  – Less costly, more scalable, more convenient

• Virtual has its drawbacks
  – Comfortable with technology
  – Must be disciplined
  – Must keep the communication constant and ongoing

• Must be comfortable in the virtual world
  – Marketing, communication, collaboration, lack of real time contact

• Solid pioneering work
  – Stephanie Kimbro
Final Considerations

- Change means stepping out of your comfort zone
- So take a deep breath... and take that first step...
Questions and Contact info

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