

Cutting the Cord: Practical Tips for Setting Up a Virtual Law Practice

Seth G. Rowland

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Geography can often get in the way of your firm's plans for world domination. But thanks to technology, you can overcome such hurdles. In this article, technology consultant and practice management expert Seth Rowland discusses several innovative law firms, ranging from a solo practitioner to a mega-firm, that have embraced some aspects of virtual law practice. He explains the technology they use to "cut the cord" and expand beyond the "four walls" of their physical office.

CUTTING THE CORD

Have you ever wished to expand your law practice beyond the four walls of your office? Or wished to work from home? Or needed to retain the services of a valued paralegal who has moved? Or even open up a second office across town?

This article looks at attorneys who have done just that, but with only modest expenditure. These firms have expanded their practice and their presence while saving money. They have cut the cord and set up a "virtual" law practice.

By liberating their staff and attorneys to work from wherever and enabling them to work whenever, they have: (1) increased staff productivity, (2) retained or secured the services of valued staff members, (3) increased worker satisfaction, and (4) gained more clients.

In looking at these firms, you will find practical tips on hardware, software,

and business processes to enable you to virtualize your law practice.

NATIONAL FERTILITY LAW CENTER

What happens when two attorneys with a great idea and a thriving practice decide to merge their firms? What happens if one is in Los Angeles and the other in San Diego? What happens if one of the principals travels extensively and another spends much of his time in his yacht near Puerto Vallarta off the coast of Mexico?

The largest group of staff members at [The National Fertility Law Center](#) was in San Diego. However, a key attorney and the managing attorney were "rooted" in Los Angeles. And several staff members had "family commitments" that required flexible work hours.

Setting up such a firm once posed a technical challenge figuring how to coordinate files, phone calls, calendars, meetings, and collaboration.

Phone System

The first step involved a phone system. The firm needed a single telephone number that could route calls to staff in multiple physical locations. The firm chose a VoIP, or Voice over IP, system. With a small adapter and a computer with an Internet connection, the user could receive direct calls anywhere. They contacted a VoIP service provider and had a router and necessary equipment installed.

At the lower cost end of the spectrum, they could have considered "call routing" services. [Freedom-Voice](#) offers an 800 number and Web-based call routing console that enables you to create a "virtual" company, with a phone directory and numbers. Depending on the "extension" entered, calls can be routed to a series of numbers, and ultimately a voicemail system that emails the message to your inbox.

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Another alternative they could have considered is a hosted VoIP system like [M5 Networks](#). It offers a package that gives you all the benefits of a business system, but without all the hassle of setting up hardware and maintaining it. M5 Networks also offers a few other valuable services such as voice transcription, which emails the text of all voicemail, and TAPI integration with your practice management system.

Desktops

Initially, the firm set up a VPN connection between the LA and San Diego Offices with "shared folders" on a common server. For the traveling partners, they set up [Go-](#)

ToMyPC on a few computers. The partners would log into to GoToMyPC and work from their office desktops. The speed was good. At a starting cost of \$19.95/month, and a setup time in minutes, it was an effective initial solution.

For the desktops, the ultimate solution was to use Windows Terminal Server. Windows ships with a single-user license to Terminal Server accessible through a Remote Desktop Connection, useful for connecting to a single PC remotely.

NFLC opted for a multi-user license of Terminal Server for their entire non-San Diego staff. They dedicated a single server to host multiple remote sessions at the same time.

The “take-away” was that they could configure this server to run all their programs in a single virtual desktop. That meant the firm had access to Time Matters, HotDocs templates, files, and email, all the time and from anywhere. Since all “remote” work happened on the Terminal Server connected to the “network,” there was no need for synchronization of files and databases across multiple offices.

Communications

When the “office” has no walls, and the partner is 150 miles away, instead of down the hall, how do you get her attention?

The solution, ingenious in its simplicity, was Microsoft Messenger. It’s free, it comes with Windows, and it doesn’t care what network you are on. Log into Windows Live Messenger and add someone to your “friends” list and you can instantly get their attention. You can chat, send files, and even engage in conferences in “chat rooms.”

For more extended communications, NFLC got a [GoToMeeting](#) account for \$49.00 per month. This account enabled them to collaborate over the Internet. By “sharing” a desktop or application, two or more people could review and jointly edit a draft agreement or review a set of legal pleadings before finalizing it. GoToMeeting is also used in the office by the managing attorney to troubleshoot technical problems in the San Diego Office and on the remote PC’s.

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LAW OFFICES OF VICTORIA RENEE WEISS

Victoria Renee Weiss is a solo practitioner in Brunswick, Georgia. Brunswick is near the resort and retirement communities of St. Simon’s Island and Jekyll Island and the military base at St. Mary’s. Ms. Weiss discovered that many of her potential clients on the “Islands” were unwilling to travel to nearby Brunswick.

The answer was to set up another office on St. Mary’s Island, usually an expensive proposition. Her solution was a four-room suite with a large conference room, a reception area, and two meeting rooms. The VoIP phone system rings her wherever she is.

Each meeting room is equipped with a PC with dual monitors and a wireless keyboard and mouse. There is no “network” in the satellite office. Rather, using remote

desktop connection (“RDC”) she connects to her main office to access Time Matters, Microsoft Office, and HotDocs. Ms. Weiss has gone paperless with Time Matters for managing documents and Fujitsu’s Rack2File for managing scanned images. The conference room has a large LCD monitor and audio-video conferencing equipment, and an integrated PC.

The absence of books, stacks of paper, and filing cabinets actually impresses her clients who see a sleek office and can sit down around a desk, much like a dining room table, to meet face to face with their attorney. She accesses all her files and data on the computer, and shows the client how she has all their information at her fingertips. When Ms. Weiss wants to meet with a client, but cannot get to St. Mary’s, she meets via video-conference. With the successful opening of this new satellite office (the paint isn’t even dry on the door sign), she is considering redesigning her main office to remove the books, files, and clutter.

MANDMARBLESTONE LLP

[MandMarblestone LLP](#) is a mid-sized Philadelphia law firm with 35 staff members that specializes in setting up and administering profit-sharing and defined benefit plans. Mand is a “lifestyle” choice. One of the main benefits of working at Mand is flexibility in hours of work, as well as work location. As long as you get the work done and put in the hours, your position is secure.

Similar to NFLC and Weiss, the solution was to set up a series of virtual terminals that could be used for “remote” access and even “in-office” access. The virtual terminals enable the firm to rapidly deploy

software updates and changes without having to “push out” changes to each desktop.

But the real benefit came in flexibility. Many employees work from home on Fridays, getting an early start on the weekends at the Jersey shore during the summer months. Some employees work at home. Others start work at home and come into the office late. So long as they log sufficient billable time into LexisNexis Billing Matters each day, management is happy.

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The firm will soon be deploying [MobileTM](#), an add-on for Time Matters that is a “Web-portal” that works on BlackBerrys, iPhones and any phone with Web-browser capability. With MobileTM the staff can check on calls, review contact and matter details, and track progress on cases, as well as review their daily agenda.

Amicus Attorney has a similar add-on product, called [Amicus Mobile](#)

2009. Other case management products offer integration with Microsoft Outlook for synchronization to mobile phones.

INNOVATION AT OTHER FIRMS

Virtual Law Practice is no longer an isolated phenomenon. More firms are “cutting the cord.” The days of being rooted to “the Office” are over. Main-line firms like [Sonnen-schein Nath & Rosenthal](#) offer their attorneys a VoIP phone, Citrix access to their offices, and email enabled smartphones.

[Honigman Miller Schwartz and Cohn](#), a large Michigan firm, has a IT staff specialist who works entirely from home, servicing the firm through a terminal session.

Solo practitioners regularly enable [GoToMyPC](#) or [LogMeIn](#) on their office desktops so that they can work from home, the beach house, and even the train via a wireless broadband connection.

Attorneys are now meeting and collaborating in virtual Web spaces using [GoToMeeting](#), [WebEx](#), [NTRmeeting](#), and a host of other services. These services are practically free with nominal monthly fees. If you simply factor in the “lost travel time” that you could not have billed for, you will recover your cost in the very first meeting.

MandMarblestone’s IT infrastructure is supported remotely by a firm that monitors and maintains all the equipment using a customized version of [LogMeIn IT-Reach](#) remote system management. Similar remote management and support capabilities are found in [GoToAssist](#), [NTRAdmin](#), and [WebEx System Management](#).

THE DARK SIDE

The promise of “virtual” is the ability to do your work whenever and wherever. The cost of setting up such a capability has never been cheaper. However, in deciding whether to “cut the cord” the question arises, “should you?” Are you simply replacing the confines of the four walls of your office with a flexible leash that tethers you to your “work” 24x7?

The dark side of virtual is that the line between office and home and between work and family becomes blurred. The first invasion of home life came with the enabling of email on the phone. The next invasion of the home might be the “virtual office.”

This invasion may prove irresistible. The technological barriers are gone. What remains is for you to decide and communicate to your clients and colleagues “when” you are willing to work. There is no longer a “where.”

Seth Rowland, Esq. was named TechnoLawyer Consultant of the Year in 2002 for his contributions to TechnoLawyer on the subject of document assembly and law practice automation. He is a nationally known technologist whose company, [Basha Systems](#), has helped many law firms build customized practice management and workflow solutions. Please feel free to [visit his blog](#) for the latest on document assembly and practice management. Basha Systems currently offers consulting services in Time Matters, HotDocs, and Amicus Attorney.

Contact Seth: sgr@bashasys.com

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