How to Set Up a Virtual Law Firm and Become an Online Lawyer

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In recent years, lawyers have increasingly benefited from the flexibility of remote work. As mindsets towards traditional brick-and-mortar legal offices evolve, being a virtual lawyer is becoming more common.

Being a virtual lawyer comes with its perks. Because lawyers are not tethered to a traditional office, lawyers can save time, lower overhead costs, and work more efficiently. At the same time, lawyers can travel between client offices, notaries, and court offices. However, virtual lawyers also need to consider how they will handle law firm security, ethics, and communication while working virtually.

But what does it mean to be a virtual lawyer? Could a virtual law firm be a more accessible and efficient way to help more legal clients? Read on to learn more.

What is a virtual lawyer?

A virtual lawyer can own their own virtual law firm or work for a firm primarily remotely. Virtual lawyers must have a secure client portal to meet the eLawyering Task Force of the ABA's concept of a virtual law firm. While the concepts sound similar, there's a difference between occasionally working remotely as a lawyer and being a virtual lawyer. The key difference is how a law firm connects with clients online.

The eLawyering Task Force of the ABA stipulates that a virtual law firm must use a secure client portal attached to a law firm's website. A virtual lawyer's secure client portal must be secure, encrypted, and user name/password dependent. This secure client portal is where clients and lawyers collaborate, share documents, and exchange data.

What are the benefits of being a virtual attorney?

The rising popularity of being a virtual lawyer is due to a combination of positive benefits, including:

Mobility

When you run a virtual firm, you can work remotely from anywhere. Being able to work from anywhere—whether from home or while travelling—makes your law firm more efficient. The flexibility of being a virtual lawyer means you can get work done even when you're not at your office desk.

Flexibility

Virtual lawyers aren't bound by the traditional nine-to-five operating hours, which means that they can work when and where they need to. The flexibility from working from different locations and at different times can benefit lawyers with children or other commitments that require a more diverse schedule. The flexibility that being a virtual lawyer affords is helpful for achieving a better work-life balance.

Reduced overhead

Even if your jurisdiction does not require you to have a physical office location (more on this later), running a virtual law firm means you don't have to pay for a large office space. With no physical office space, you don't have to spend a lot of money on office equipment (like large printers and fax machines) and its upkeep. Because virtual law firms tend to use cloud-based software to facilitate virtual work, there are fewer expenses for things like on-premise servers.

Environmental friendliness

Going virtual can help reduce your firm's carbon footprint in multiple ways. Without a daily commute to the office, you can cut your emissions from driving. By digitizing document management and client intake forms, you can also significantly reduce your firm's paper usage.

More versatile client communication

Virtual meetings can make your legal services more accessible. Not all clients want to or can meet in person. If you can conduct virtual meetings, your clients can benefit from the increased convenience. Clients with mobility issues or who may not physically be in town can still participate in meetings with you. Because virtual meetings are more convenient, they also encourage more frequent lawyer-client communication, which is key for better law firm client communication.

How to become a virtual attorney and set up a virtual law firm?

Becoming a virtual lawyer can offer many advantages. But you need to consider more than just how to set up your new law firm workspace. To be successful as a virtual lawyer, you must know the rules, make a plan, and implement it strategically.

1. Know the rules and ethics of being a virtual lawyer

Before you take your law firm virtual, you need to know the applicable rules and ethical considerations.

For example, certain states require lawyers to have physical office space. In these cases, you must have a physical office presence and are not allowed to be an entirely virtual lawyer. Check the requirements for your jurisdiction and follow the rules for your area.

Additionally, it's your duty as a lawyer to protect your clients' data and maintain client confidentiality. As a virtual lawyer, more of your communications occur online instead of in person. That's why it's especially critical that your law firm data is secure and all channels are encrypted.

Learn more from the ABA and the ethics of a virtual practice and law firm data security.

2. Transition from a traditional to a virtual law firm

Becoming a virtual solo practitioner requires many of the same steps as opening a traditional law practice. That's why it's important to take the time to plan accordingly—reviewing our guide to starting your own law firm is a good place to start. Here are other steps to consider:

- **Make a business plan**. For example, you'll want to create a (or update your existing) law firm business plan to set measurable goals, define your firm's vision and core values, make a financial plan, and analyze the market that you're entering.
- **Strategize how you will handle client intake**. Virtual law firms can benefit from online, automated solutions for client intake. Clio Grow's client intake software lets you generate intake forms and schedule consultations virtually.

- **Create a communication plan**. You'll need a strategy for your internal communications without everyone at the office. Will you use email, chat, video meetings, apps like Slack, or phone calls? In addition, you'll need to think about how you will handle client communications. Ask yourself: What will be your process for booking and conducting meetings with clients? Read our interview with master facilitator Priya Parker for tips on running great meetings both online and in-person.
- **Create a marketing plan for your practice**. Because your virtual law firm is online, you need to have an effective strategy to market it. An SEO-optimized, well-designed law firm website is essential (both for promotion and for connecting clients to your firm's secure online client portal). Your marketing plan should also account for other ways to connect with clients, such as social media and online advertising for lawyers.

For fresh ideas on getting your name out there and driving business, learn about how to get new clients for a law firm.

3. Learn how to transition from a traditional law firm

If you already run a traditional law firm and want to transition to a more virtual law practice, consider these tips:

- **Don't rush the process.** If you already have a traditional law practice, don't worry about immediately going virtual all at once. You can create a plan to start with a hybrid in-person and virtual law office model. For example, you could have employees work four days a week in the office and one day remotely. Then, you can gradually increase the ratio of in-person-to-remote days as you transition.
- **Find ways to streamline tasks and make them virtua**l. Look for opportunities to create processes that typically need to be done in the office secure and virtual. For example, you can switch from scanning a document on an office scanner to using a secure document scanning app on your phone.
- **Automate your existing processes with technology**. The right cloud-based technology can streamline your processes and make it easier and more secure to work as a virtual lawyer. When choosing tech solutions for your virtual law firm, take your time and choose carefully. Be sure to vet multiple options and make sure any solutions you consider are secure and encrypted.

For example, cloud-based practice management software like Clio Manage helps you automate tasks. Clio Manage also allows your law firm to keep matters and information organized, track your time and expenses, manage your calendar, and manage invoices in one place. Book a demo today to see Clio Manage in action.

How do you service clients as a virtual lawyer?

The benefits of virtual law firms aren't just for attorneys: Virtual lawyers can help more people in the ways that they want—which means a more exceptional client experience.

As Clio CEO and Co-founder Jack Newton outlines in his book, *The Client-Centered Law Firm*, the key to great client experiences is to give customers what they want and need in a situation.

When it comes to legal services, clients increasingly want the convenient experience that virtual law firms can provide, including:

A virtual client portal

As previously discussed, a secure online portal—where you can share information and communicate with clients is necessary for a virtual law firm. Today's consumers also want a lawyer who can offer this. According to the *2020 Legal Trends Report*, 69% of consumers prefer working with a lawyer who can share documents electronically through a web page, app, or online portal.

Giving clients secure access to their cases via an online portal is a win for lawyers and clients. Clients can get a better experience as they can access and check their case information themselves. At the same time, a virtual client portal also saves lawyers time that they might otherwise spend communicating updates.

Learn more about Clio Manage's secure client portal, Clio for Clients.

Document management software

Virtual law firms need to be able to access case documents from anywhere securely. Virtual lawyers can turn to cloud-based document management solutions (such as Clio Manage, OneDrive, or Dropbox).

For example, Clio Manage's cloud-based document management software offers unlimited document storage. With Clio Manage, you can access your client documents from anywhere on your laptop or mobile phone.

From a clients' perspective, cloud-based document management software saves time and helps create a more seamless legal experience. In addition to quickly sharing legal documents via the secure online law firm portal, Clio also offers e-signature functionality to make signing documents in certain situations easier and faster for clients.

Video consultations

While virtual lawyers may still have in-person meetings, videoconferencing makes it easier for virtual lawyers to help more clients no matter where they are.

As the *2020 Legal Trends Report* notes, 37% of consumers prefer to meet virtually with a lawyer for a consultation or first meeting. Also, 50% of consumers would rather have their follow-up meetings through video conference. Working virtually can give clients the experience that they want, while also saving lawyers time.

Becoming a virtual lawyer can benefit your law firm and clients

Working remotely is no longer an abstract idea for attorneys. Secure, cloud-based technology makes working virtually possible—and, in many ways, preferable.

While being a virtual lawyer can vary from working remotely some of the time to running a virtual law firm, virtual lawyers need a secure online client portal. Not all firms are allowed to be 100% virtual due to rules requiring a physical office presence in their jurisdiction. But with planning and forethought, most firms can incorporate elements of virtual law firms to unlock the benefits of increased flexibility for lawyers—and a better, more convenient experience for clients.

With this in mind, if you're wondering if being a virtual lawyer could work for you, start by learning the rules for your area and creating a plan for your business. With the right tech tools and plans for communication and marketing, going virtual could empower you to help more clients while enjoying lower costs and a better work-life balance.

Want to learn even more about building a virtual law firm? Watch our webinar, How to Build the Best Virtual Law Firm.

About Clio

Clio is the global leader in legal AI, powering legal work across the profession, from law firms of every size to corporate legal teams, government agencies, and courts. Its Intelligent Legal Work Platform unites the business and practice of law, connecting the people, information, and processes behind legal work. Clio's AI brings the context together

with legal sources drawn from Clio Library, a growing collection of more than one billion legal documents. Over 400,000 legal professionals in more than 130 countries rely on Clio to run their legal world. Learn more at www.clio.com.