

# THE VIRTUAL LAW FIRM

Build, Develop And Master Virtual Teams

March 13, 2023

John Tucker



# JOHN TUCKER

## ATTORNEY & ADJUNCT PRACTICE ADVISOR

- John is the Founder of Tucker Disability Law, P.A. in St. Petersburg, FL which has a national practice handling insurance claims/litigation and VA appeals
- He has an extensive teaching background over his 30+ year practice, including serving as an Adjunct Professor of Law for Stetson University College of Law
- He joined Atticus as an Adjunct Practice Advisor to help translate his success in running a law firm to other lawyers looking for guidance and support to achieve their goals



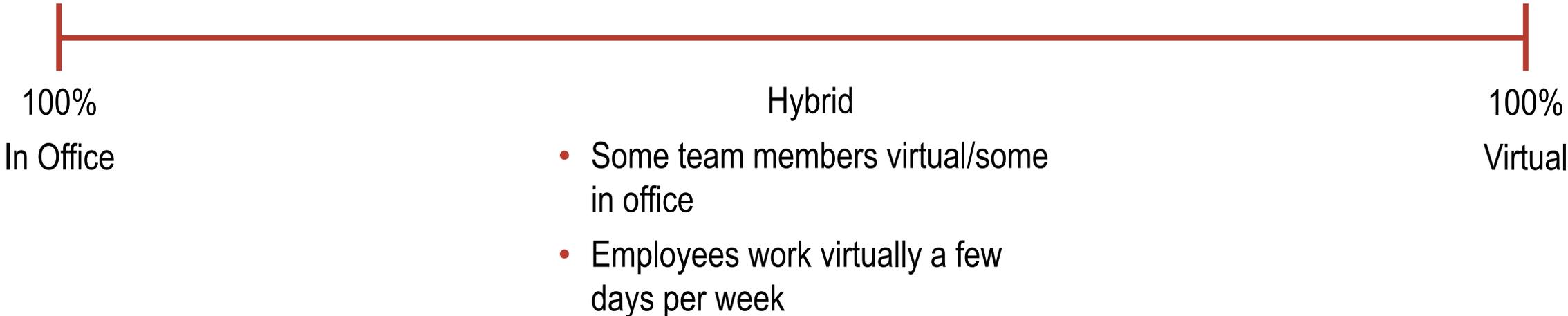
# OBJECTIVES:

1. Take advantage of the virtual work environment opportunities and minimize concerns or threats
2. Determine what virtual work model best works for your firm (100% virtual, Hybrid, or 100% in office)
3. Improve on or experiment with the virtual work environment.

Virtual work environments will  
absolutely magnify your firm's  
imperfections...and that's a good  
thing.

Shawn McNalis

# THREE MODELS FOR CONSIDERATION



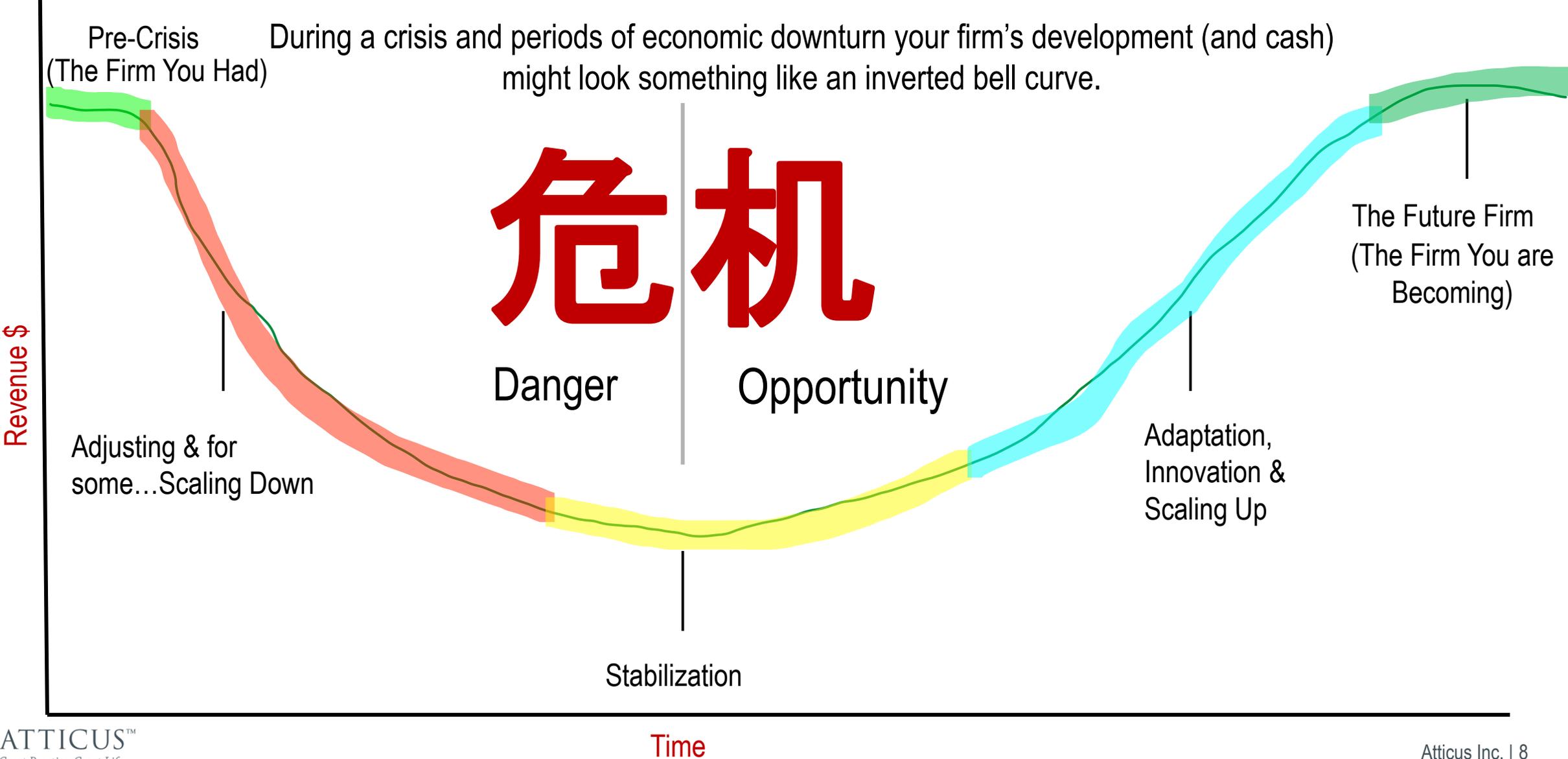
# WHAT DO WE MEAN BY “VIRTUAL” OFFICE?

- A firm where a proportion (if not all) of workers use technology to perform their work at home or somewhere other than a primary, shared office space
- While employees can work from anywhere, they may have things like a firm mailing address, phone answering services, access to meeting rooms, and videoconferencing
- The term can be used interchangeably with “remote” work environments
- Hybrid is some combination of virtual and an in-office work environment.

# WHAT WE KNOW ABOUT WORKING VIRTUALLY:

1. Law firms have been working remotely for years...from the courthouse, from home, from the car! You just didn't call it remote work.
2. Research from social sciences tell us that many employees crave this remote work environment.
3. The remote work and hybrid model have taken hold...there is no going back. Now we just need to get good at it and master it.
4. Law firms are in the “honeymoon” phase in utilizing virtual environments and there is still lots of learning to do.
5. Beware of a Fixed Mindset: Most law firms won't change unless there's a crisis.

# THE COVID-19 CRISIS WAS A CATALYST FOR FIRMS



# S.W.O.T EXERCISE

Strengths

Weaknesses

Opportunities

Threats

# ELLEN COOKMAN EXPERIENCE



**100% Virtual**

**Resisted every piece of going virtual**

**Re-signed Lease during Covid**

**Office Issues – cancelled lease**

**Clients & prospects adapted nicely**

**Replaced every employee with an out of state (less expensive) person**

**Worked through technology issues at they came up**

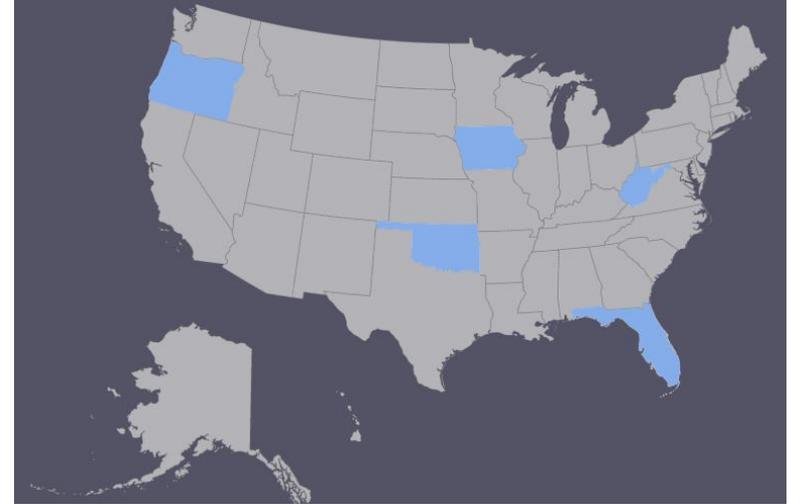
**Team has weekly Zoom meetings, individual performance meetings, celebrates b-day's and family events**

# JOHN TUCKER EXPERIENCE

1) Pre-COVID: Without a plan, virtual just occurred as employees moved away. It was retention in action.

2) COVID: Brought on the realization the firm was already operating in a hybrid remote model.

3) 2023: 16 employees in 5 states. Remote team members include the Firm Manager, the Head Bookkeeper, Intake Personnel, and Attorneys.



\*\*All are firm employees, not independent contractors

\*\*Cost savings was not a driver. Based in Florida, John did not acquire talent at a lower cost like some northern and west coast firms

# CONSIDERATIONS IN MAKING VIRTUAL WORK FOR YOU

1. Developing virtual policies and procedures
2. Know your constraints, personally and professionally
3. Understand behavioral drivers
4. Recognize critical client and team needs
5. Manage and measure productivity
6. Foster trust and communication
7. Manage the security risks
8. Create a structure of accountability
9. Build and sustain your firm culture
10. Think big! Or consider your new options





**POLICIES**

**PROCEDURES**

## FIRM POLICIES FOR REMOTE WORK

- Remote work conduct
- Timekeeping and availability
- Technology (computer, mobile devices)
- Shared data access procedures
- Office set-up
- Firm's access to computers
- Property ownership

# SAMPLE POLICY PROVISIONS:

- You will have a dedicated workspace that is private, including a door
- You will protect the attorney-client privilege at all times. This includes, but is not limited to, structuring your workspace so no other individuals will hear your discussions about private client matters or view any documents or computer screens
- The dedicated workspace will have restricted access, and only you will be able to access the workspace

# KNOW YOUR CONSTRAINTS

# KNOW YOUR CONSTRAINTS

Which positions can't go remote due to critical in-person operations in the firm?

- Client intake: some clients will not adjust to virtual meetings and want to see an established brick-and-mortar office
- Corporate clients may also prefer an established office for meetings



# KNOW YOUR CONSTRAINTS

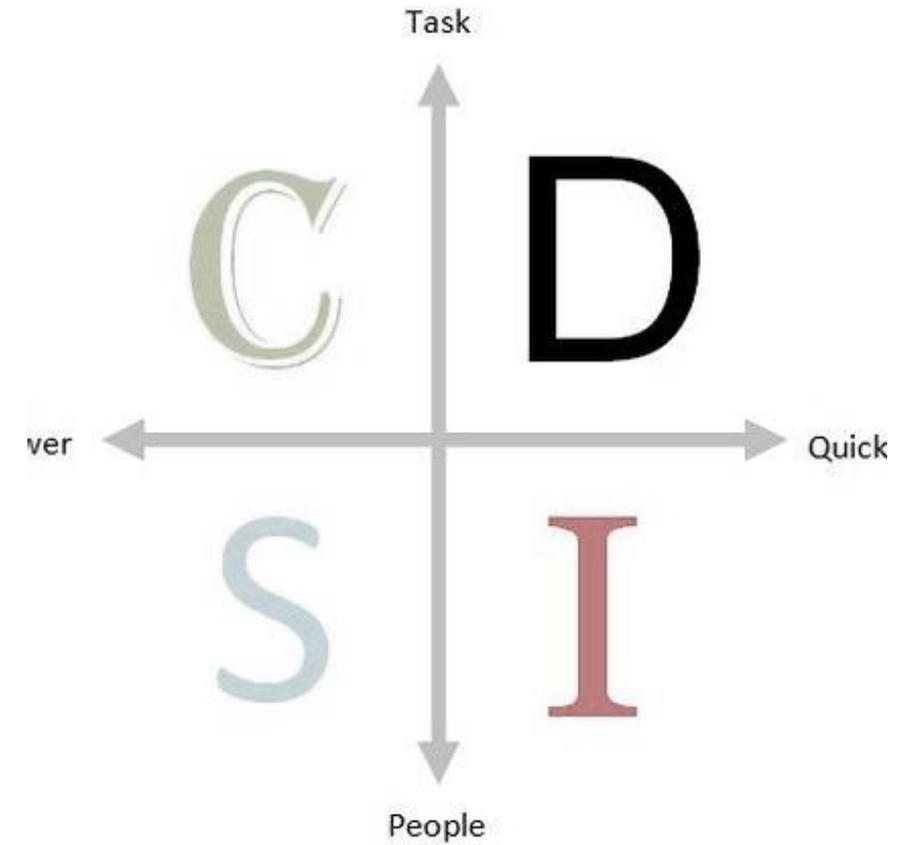
- Complex work that requires collaboration
- Who earns the privilege of working remote
  - High performers
  - People who can/do measure productivity



# BEHAVIORAL CONSIDERATIONS

Who is better equipped to work remotely because of their DISC?

- High Cs will love the uninterrupted time to work
- High Is will begin to feel isolated and may be easily distracted by the home environment
- High Ss may burn out trying to be all things to all people: parent, spouse, home-schooler, cook, chauffeur, pet wrangler
- High Ds are self-starters and can work well independently



# MANAGING PRODUCTIVITY

# MANAGE PRODUCTIVITY

1. Reiterate the production standards of all remote workers
2. Incorporate weekly planning meetings that include remote workers
3. Set up individual accountability meetings with remotes and use KPIs to measure their performance



# MANAGE PRODUCTIVITY

If you don't have a team culture built on trust with high accountability, monitoring remote productivity using software is easier than ever.

Three options are:

- Hubstaff
- ActivTrak
- Smokeball



# COMPENSATION CONSIDERATIONS

# COMPENSATION CONSIDERATIONS

- If a team member works virtually nearby, their compensation may stay the same
- If a team member moves out of an expensive metropolitan area to a less expensive area, some firms are reducing their compensation (following the lead of tech firms, though this is risky)
- Some firms are taking the reduction in overhead costs associated with virtual workers and using that in signing bonuses and other benefits to attract new workers



# FIRM CULTURE

# BUILD YOUR FIRM'S CULTURE

- Your firm's culture reflects your values – if you don't have a values statement, create one with the team. Review them quarterly. Ask team members to take one value on for the quarter and report back
- Add your “Why” (mission) to the firm's goals – this is not only good but retains and attracts workers. Or, allow team members paid time to participate in their charity of choice
- Hold an annual in person (if possible) firm retreat with a teambuilding event that's fun
- Create Zoom meetings that start or end with fun. Pay attention to personal and family happenings

# BUILDING AND DEVELOPING TRUST

- Meet regularly both with the team and with individuals, including remote workers.
- Create a culture of acknowledgement. Start group meetings with a discussion of individual “wins.” Encourage praise of others.
- Use every opportunity to acknowledge clients well-served, a job well done or other team achievements.
- Reinforce team development with quarterly or annual reviews that focus on the individuals' goals and firm goals.
- Train on respectful communication and email communication.

# SECURITY PROTOCOLS

# SECURITY PROTOCOLS

- If possible, use a VPM: a Virtual Private Network
- Team members must use firm-owned computers and equipment
- Establish approved work locations so the team isn't working in coffee shops or on unknown Wi-Fi connections
- Use GPS tracking or tell team you'll "ping" their computer regularly
- Make sure the team member has private workspace and doesn't use a shared printer with others
- Establish written security protocols, drill team on them and have them sign
- Enter protocols into policy & procedure manual



**THINK BIG,**

START SMALL.

*keep moving.*

DEEPER  KIDMIN

- Create a statewide practice operating 24 hours a day
- Set up a remote office in a different state, (Pay attention to state licensure issues)
- Purchase firms in other areas and decentralize workloads

# EXPERIMENT!

- Grow your workforce without paying for more space
- Create a hybrid workforce in your firm
- Outsource some of your work by using remote contractors or overseas agencies



Name: \_\_\_\_\_ Date: \_\_\_\_\_

1	The idea	4	The worst case if we don't do it	
2	Who will benefit?	5	The best case if we do it	
3	How will their lives improve?	6	For this project to be a success, what will have to occur?	

**USE THE PROJECT PITCH  
TO HELP YOU ANALYZE  
WHETHER A REMOTE OR  
VIRTUAL FIRM IS RIGHT  
FOR YOU**

# UPCOMING WORKSHOP AND STAYING CONNECTED



“THE BENEFITS OF A GOOD HIRING SYSTEM – HOW TO USE THE DISC ASSESSMENT TO ATTRACT GREAT TALENT”

---

March 22<sup>nd</sup>, 2023, 2:00-3:30pm ET

- Register at:  
<https://atticusadvantage.com/what-we-do/workshops/>
- At check-out enter “**HIRE50**” to get ½ off registration for the workshop

# UPCOMING WORKSHOP AND STAYING CONNECTED



“THE BILLABLE HOUR LAW FIRM  
WORKSHOP – IMPLEMENTING  
GROWTH STRATEGIES TO  
MAXIMIZE PROFITS”

---

April 27<sup>th</sup>, 2023, 2:00-3:30pm ET

- Register at:  
<https://atticusadvantage.com/what-we-do/workshops/>
- At check-out enter “**BILL50**” to get ½ off registration for the workshop

Thank you!



ATTICUS™

*Great Practice. Great Life.*