

REFLECTIONS

Best practices for being remote

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Working remotely as a lawyer or legal professional might seem like a perk.

To some it might even seem unorthodox, but as the world continues to change with the pandemic having pushed us in that direction, working remotely has become the norm for many.



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INTRODUCTION



Leah Molatseli is a lawyer, published author, speaker and Legal Tech and Innovation Specialist who currently holds the role of Head of Business Development at Legal Interact. She focuses on the intersection between law, innovation and technology, using her expertise to educate and empower the legal market. She is a Guest Lecturer at the University of Cape Town where she develops and teaches legal tech and innovation related courses to the broader legal industry. She is a Mandela Washington Fellow, a University of Notre Dame alum who enjoys everything that speaks to using technology and innovative processes to empower lawyers in whatever roles they find themselves in, from practicing lawyers to inhouse legal teams.

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Whether you are digitizing or simply looking for ways to be a remote working lawyer. This guide is packed with practical tips and techs on best practices for remote work for lawyers.

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Tools for Remote Work



The other day a Software Engineer friend of mine, posted about having travelled over 7 countries in the past year while working remotely for a company in South Africa. This got me thinking whether it was even possible for lawyers, given the tech that we have and use and the industry we operate in. Whether you've looked at working remotely as a lawyer in the past with hopes of being a digital nomad or whether this is the first time you are looking into it, this guide will provide insights into the ways you can achieve a productive remote work lifestyle.



● IN THIS ARTICLE WE WILL BE LOOKING INTO:



Actions to follow for successful remote work



What to do if you still need to meet clients in person



A basic list of tools to use for remote lawyering

In typical lawyer style though the answer to whether working remotely as a lawyer is possible, is critical clear, it is based on several factors, e.g., your practice area, what an average day looks like to you, your employer, your teams and your clients to name a few. However, in short, YES, it should be possible to do your work remotely.

Attending court may be an issue, however with the current use of video conferencing platforms in South African courts like Caselines, attending court virtually makes remote working possible under those circumstances.

Software development and tech has allowed lawyers to be able to do legal work from anywhere. Some examples include the drafting of legal documents, via Microsoft Word online, Google Docs or integrated legal tech solutions like Legal Interact's [Matter Manager](#) or [Practice Manager Pro](#) and have those legal documents signed electronically (in some cases) whilst still keeping clients updated and ensuring that client data is kept securely and privately.



Actions to follow when working remotely as a Lawyer:

1

Communicate changes with clients, staff, and colleagues

- If you're opening a remote-first practice from the start, this point isn't as relevant. But if you're shifting from a more traditional law firm model to remote work—permanently or temporarily—it is of utmost importance to clearly communicate any changes and new policies.
- Send an email making it clear that you're shifting to remote work and set expectations: from which communication channels to use, how meetings will take place, and how often you'll be contacting clients. If you're cancelling all in-person meetings, let everyone know far in advance so they can adjust their plans.
- Make the switch to video conferences easy by adding links to video invites within the notes section of any calendar events.
- Make it easy to schedule meetings by including links to schedule online meetings at convenient times.

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Get a strong internet connection

- Working remotely means a lot more time in front of your computer, and as a lawyer, you can't afford losing connection in the middle of a video conference meeting.
- Sometimes you might need to collaborate with clients or colleagues on important legal documents and having a strong internet connection allows for easier access to the cloud document when collaborating online.

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Set up remote access to cases and documents

- **Scan Paper Documents**
First, digitise anything you might need that's paper-only and which hasn't already been scanned into your computer or the cloud.
- **Store Documents in The Cloud**
Cloud-based document storage solutions allow you to securely access your files from if you have an internet connection. You can also collaborate easily with staff, colleagues, and clients utilising Legal Interact's legal tech solutions like Matter Manager and Practice Manager Pro.

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Prepare a positive remote experience for clients

- Clients will be looking for you and your services whether you're working remotely or not. Provide clear information on your website, social media or anywhere where you have a business presence online.
- Create a streamlined onboarding process and be upfront about the fact that you're working remotely, and the experience clients can expect.
- Consider offering consultations over the phone or via video to create peace of mind for potential clients.
- Send newly signed clients a welcome letter with:
 - How best to contact you
 - How often to expect communications
 - Times you'll be available if you're working unconventional hours or in a different time zone.
 - Send a modified version of the letter to existing clients as well.
- To keep potential clients and new client onboarding organised, you may want to invest in a customer relationship management (CRM) and client intake solution like Legal Interact's Practice Manager Pro which helps with contact organisation, etc. If you use a different solution for client intake, make sure you're able to access any information about potential new clients remotely.

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Communicate with clients securely

- If you're working remotely, you likely won't be meeting clients in-person. Of course, this depends on the type of law you practice, but at the very least, you'll need to prepare to provide case updates and ongoing communications online, via text, or over the phone.
- Luckily, there are plenty of options available. And as a bonus, your clients may even appreciate the convenience of different communication methods. The main thing is to make sure any channels you're using are encrypted and secure. As a lawyer, you need to uphold our duty to keep client information confidential, and if communication channels aren't encrypted, it's all too easy for others to gain access to client conversations.
- Tools like Skype are fine for short video chats where you won't be discussing anything substantial, but when you'll be discussing sensitive information with a colleague or client, we recommend tools which use encryption to keep our video calls secure.
- For longer messages, document sharing, and invoice sharing, email can work. However, lawyers must ensure they're using an encrypted email service, e.g., Microsoft Outlook.

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Be reachable by phone

- You may not be at the office, but your clients will still phone you! Even if you don't have an office, it's likely you'll have at least some clients who want to get in contact via phone. For example, clients with limited access to technology might have an easier time phoning you than texting, emailing, or video chatting.
- For temporary remote work, make sure all calls are forwarded from the number at our law firm to our cell phone, or another number you can easily access while away from the office.
- For permanent remote work, consider switching to a Voice Over Internet Protocol (VOIP) phone service. Such services allow you to make phone calls from our computer. It's also worth investing in a headset for top-notch sound quality on any calls.

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Use e-filing if available

- If you need to file documents with the courts, investigate e-filing as an option. We have options such as Legal Serve which facilitates e-filing. What is interesting to note is that the SA Judiciary is in the process of implementing a court online system for litigation lawyers. You can find out more [here](#).

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Plan for professional video meetings

- It's a given that you'll need to look professional for video meetings, but with only a little bit of effort and planning, you'll look extra sharp and create a strong, positive impression on clients and other legal professionals.
- Keep your background tidy. What's the view behind your computer? Tidy any shelves, keep the kitchen or laundry baskets out of view, and if all else fails, sit in front of a blank wall. If you have a home office, try to take video meetings there. It's important to meet professional contacts from a professional space.
- Prevent distractions. Lock the dog out of the room, give a heads up that our kids are home, and turn down the volume of other devices (or turn them off). If you're not at home, find a quiet place to meet. It's easier than you think to get distracted when meeting remotely.
- Choose strong lighting. Harsh or dim lighting can make it appear as if something is off when you're on video. If you can, sit in a room with stronger-than-you-think-you-need incandescent light (or LED energy-saving lights that imitate incandescent light) commonly known as "ring light".
- Keep your video on. The best video meeting etiquette is to always appear on video. It shows you're present and engaged in the conversation and gives your clients and colleagues visual cues about how you're reacting.
- Use a headset. Today's laptop mics are strong, but a headset will ensure crisp, professional sound quality on our calls—a critical consideration if someone on the call has low hearing.
- Consider muting yourself when it's not your turn to talk. Take stock of your surroundings, and mute yourself if needed; just be sure to give your full attention to the video camera (and maybe disregard this rule for 1:1 meetings).

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Take care of your mental health when working remotely

No matter why you're doing it—or where you're doing it from—remote work can be isolating. If you're used to interacting with others directly daily, suddenly sitting alone all day can be a tough change for your mental health. To combat the downside of remote work, create a routine, and create some distance between your work and personal life.



What if you still need to meet clients in-person?

Depending on our practice area, you may still need to meet clients in person, even if you're working remotely. For example, you may need to meet clients so they can sign their will. If you work from home, and if there are no extenuating circumstances preventing you from meeting with clients, this isn't a problem. You can schedule a time to meet at the office or rent a meeting room at a shared working space if you don't have an office.

Working remotely for teams

We've covered a lot about how to work remotely as an individual lawyer, but what if you work at (or own) a small or medium-sized firm? How do you grapple with the realities of remote work when your team numbers more than 20? How do you set up our law firm employees and staff to collaborate effectively and ensure our firm is profitable?

There are many things to consider here, but we'll touch on two of the most important points:

1. Have a clear remote work policy and implement it
2. Tracking firm productivity when everyone is remote

WHAT MAKES A GOOD REMOTE WORK POLICY?

Whether you're creating a work-from-home policy or a policy that allows employees to work remotely from anywhere, your policy (or lack thereof) can make or break the success of remote work at our firm.

The best remote work policies include these points:

- 1. Make it clear when it's OK to work from home.**

Ambiguity is the enemy here. If you're okay with lawyers and staff working from home as they please, say that. If there are specific circumstances under which it's OK to work from home or abroad, lay that out clearly too.

- 2. Set clear expectations.**

Set guidelines for what you expect of firm members when working remotely. Examples may include to dress professional while on video, to be available on certain internal channels and respond promptly, and to use firm-mandated tools. If you can, speak to employees about the policy before formally implementing it to ensure any questions are answered.

- 3. Ensure employees are working securely.**

To keep client data safe, everyone must uphold the same security standards that they would while working in the office. Make sure everyone is using computers and other hardware provided by the law firm and have a clear device policy if they're using their own devices. Stick to firm-mandated apps and software programs as well and ensure everyone is following data security best practices.

TRACKING PRODUCTIVITY

When everyone at your firm isn't at the same location, how do you track productivity? How can you ensure our firm is profitable and productive—and if there are issues, how do you pinpoint them so you can fix them?

There's no simple answer to these questions, and if you're used to seeing everyone in the office, not having that visibility can be a jarring transition. But the fact is, remote or not, technology can help you rally your team around goals and track progress towards desired targets. Whether you use case management software with built-in analytics, or whether you use different software for tracking firm success, this type of technology is essential for getting objective performance insights to help you drive the best business decisions.

[Practice Manager Pro](#) shows your firm's utilisation, realisation, fees and rates so you can see:

- How many billable hours your firm is logging every day per fee earner
- How many of those billables are making it onto invoices

This allows you to track revenue, measure changes in performance over time, and pinpoint areas for improvement. You can also review performance at an individual level to help with coaching, professional development, and more.

With a clear remote work policy, a plan for tracking success and ensuring firm productivity, firms of any size can work remotely, successfully. The most important thing is to talk to everyone at your firm about the transition and ensure you're all on the same page about what's expected. This will help avoid any hiccups, so that your firm continues to thrive while everyone is away from the office.



Tools for Remote Work

Your tech stack may differ depending on your practice area, the size of our firm, and your responsibilities to the firm. This list covers our basic recommended tech for optimal remote work.

LAPTOP

First and foremost, you'll need a computer. Just make sure your laptop has enough processing power to handle your work; You can't have your computer crashing each time you go to edit a large legal document.

SCANNER

Even if you've gone mostly paperless, you'll need to be prepared to keep the odd letter or document organized in the cloud.

HEADSET

Most modern computer mics are powerful, but you may still want to consider investing in a headset for clarity during important calls. Nothing will remove a clients' peace of mind like being unable to hear you on the phone or over video.

CLOUD-BASED EMAIL

If you use an email program that depends on a local server, it's worth switching to something secure and cloud-based when working remotely. This ensures you'll be able to access our email from anywhere. Follow best practices for email encryption to keep communications secure. Gmail or Microsoft Outlook are excellent choices.

CLOUD-BASED PRACTICE MANAGEMENT SOFTWARE

Case management software like Legal Interact's [Practice Manager Pro](#) solution allows you to keep all your cases, contacts, bills, calendars, and more organized in one place while working remotely. It ensures that the whole firm is working in one workspace and all documents are accessible given the required permissions are held.

VOIP PHONE PROVIDER

It's important to be available on your business number whether you're at home or abroad. If you're working from home, you can ask for calls to be forwarded there, but a VOIP provider will ensure any calls to your business number go directly to you, preventing any being missed.

VIDEO MEETING PROGRAM

As mentioned earlier in this guide, working remotely means you'll need a replacement for meeting clients in-person. You need to look sharp, but communications need to stay secure.



What's Next?

Working remotely as a lawyer is entirely possible no matter when or why you need to work remotely, it's entirely possible to do so.

With the right tools, and by following a few key best practices, you'll continue to run a profitable firm while providing good client service and experiences. In the digital age, depending on the situation, your clients may even appreciate the convenience of a remote experience.

Choose secure tools, communicate clearly and effectively about the way your remote practice will operate and ensure you've got a strong internet connection. Set it up correctly and your firm will be able to thrive from anywhere.

Beyond anything as the world as we know it continues to evolve with the Web3 developments and the Metaverse it has become even more important for lawyers to be able to navigate the world in a new way. Small developments have been seen currently in the use of AR and VR devices and tools in litigation matters, e.g., court proceedings and the process of giving evidence as a witness. Where this will take us only time will tell, but what is clear is that technology does not wait for us, either as lawyers we adapt or remain behind and stagnant.



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