



The No-Panic Guide to Remote Legal Work

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INTRODUCTION

Rebuilding our boats on the open sea

Under the shadow of COVID-19, law firms are transforming their industry. They are making dramatic changes to their practice precisely at the time when they cannot physically convene to make new plans, are under increased financial pressure, and face the added stress brought on by the global pandemic and social quarantine rules.

The situation is similar to that described by the Austrian philosopher Otto Neurath a century ago: “We are like sailors who on the open sea must reconstruct their ship but are never able to start afresh from the bottom.”

The reason we still dare call this a ‘No-Panic Guide’ is because lawyers are proving they have better tools at their disposal than ever before. No one is predicting easy years ahead for the legal industry, but with careful focus and smart changes, many firms will be able to weather these storms.

We’ve made this guide to serve legal professionals as they transform their industry. Chapter 1 focuses on specific tools and technologies law firms can use to transition to a remote workforce. Chapter 2 makes recommendations for changes to firm culture and behavior to better support remote work. Finally, Chapter 3 addresses specific ways to better serve clients and your workforce while working remotely in times of crisis.

Through the months and years ahead, whatever happens with the current pandemic, remote work will remain a key facet of the legal industry. We hope this guide is helpful as lawyers renovate their practice—one plank at a time.

CHAPTER 1

Taking the leap

Tools and Tech for the Remote Work Transition

Even when circumstances require a firm to adopt remote work rapidly they should proceed with care. Going back to the boat metaphor: rapidly ripping out all the old carpentry will only make you sink faster. Policy adaptations and technology investments should always align with the firm's priorities.

The most important consideration for law offices adopting remote work practices is to take stock of their current capabilities. They should begin with the structures already in place and work out from there to eventually develop a full-fledged remote legal office.

The 3 Basics:

For firm managers overwhelmed by this time of radical transformation, it can help to first focus on the bare essentials.

1. Access to the Cloud

When COVID-19 hit, many businesses scrambled to stay afloat. But one sector soared: [the cloud](#). When you lose the central office space, you need a virtual tool to provide that core space. The cloud is the most important tool to provide coherence, direction, and accessibility to a remote workforce.

With [cloud-based practice and document management](#), your case files, time-tracking tools, reports, and documents can be available at your remote office, from any device. It doesn't require complicated technical support or new training—just like in the office, you log on and get to work.

If your firm hasn't invested in a cloud-based legal operating core, analyze whether you have other cloud-based tools at your disposal. Does your business use Google Docs, iCloud, Evernote, or Office 365? It might be more difficult to organize an entire practice around generic business tools, but these can at least provide basic access to your files.

What about firms that haven't yet seriously invested in the cloud? According to the [2019 ABA TechReport](#), only 58%

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Even under the best of circumstances, transitioning to the cloud takes time and resources. That's why so many firms have put it off this long. But the earlier firms invest in secure, comprehensive cloud-based tools the earlier they can reap the benefits of remote work. This is why [business analysts are predicting](#) that those who invest now in digital transformation will outperform those who take a more conservative approach.

If you're only now transitioning to the cloud, you may need to bring a 'triage' mindset to the process. To determine your priorities, ask:

- Which files and matters are most urgent, needing immediate cloud accessibility?
- Can you bring on additional help or services to digitize files?
- How will you ensure security for each other and your clients throughout the digitization process?
- Do you have remote desktop access in place that can be used as a stopgap measure (and if so, is it sufficiently secure)?
- Will you need to hire additional IT help to get your team through this transition?

The COVID-19 crisis transformed the way people think about legal services. Even once the crisis has abated, the cloud will remain a crucial legal tool. Clients will increasingly come to expect legal services that can succeed remotely. And the right technology will position lawyers to better comply with their ethical obligations to protect confidential client information, as set out in [ABA Model Rule 1.6, Formal Opinion 477r](#), and the [ACC Model Information Protection and Security Controls](#).

2. Secure Mobile Devices

Each member of your team needs a secure device, prepped and ready for mobility.

The standard law firm model relies on desktop computers, but this is an era for mobile laptops and tablets. Affordability, rapid deployment, and easy

access to all your cloud-based tools make laptops and tablets an effective solution when it comes to workplace mobility.

Whatever tools you choose, it's crucial to ensure they're continually updated. Older software is more likely to have vulnerabilities that hackers can exploit. Ensure your mobile devices are frequently updated manually to include all important security patches.

You could also consider implementing a Mobile Device Management (MDM) solution to help reduce the security risks to these devices. MDM software is available to help you inventory, secure, manage and protect mobile devices and ensure they are patched, encrypted and only authorized software is installed and used.

Of course, for these devices to be useful, you also need a stable internet connection. That might mean beefing up on bandwidth for some home offices. Here are a few stop-gap measures if your internet is slow or choppy:

- During video calls, shut down other bandwidth consuming applications.
- If a video call still freezes or has choppy sound, close the visual portion and rely on audio.
- Stagger video meetings with others who are working in the same location, if possible.
- If working from home, establish ground rules with children about when they can use the bandwidth with Netflix and online games.



3. A Shared Communication Platform

Your team needs to communicate across distance, in written chats, and on video calls. To find the platform that will work best for you, start with the systems that are already in use. If your law firm is already an Office 365 customer, consider going with Microsoft Teams. If you're a firm that uses GSuite, Google Meet can bring you together. Other popular meeting technologies include Zoom, Slack, and RingCentral.

By sticking with communication platforms that are already familiar to your team, you can make your initial transition smoother. You also might want to consider which platforms the majority of your clients are already using, so you can find one solution that enables easy video conferencing with them as well.

Whatever your team chooses, make sure everyone can connect to it on the operating system they're using, and that the sound and video quality meet your needs.

Ensure any cloud hosting services you consider using for your shared communication platform are either SOC 2 Type I & II compliant or they are working towards their compliance certification.

16 Advanced Steps for a Fully Remote Office:

With your basics in place, you can move to incorporate other tools and technologies, expanding to give your team fully-functioning legal offices from their homes.

1. Calendars

Make sure your team is all on one shared calendaring system. If you use a robust legal operating core like Filevine, your deadlines and meetings will already be accessible through the cloud. Rules-based calendaring tools can make it easier to ensure no deadlines are missed. If those aren't already in place, then law firms will need to rely on other tools like Outlook Calendar or Google Calendar, or worse, multiple calendars simultaneously.

Whatever tool is chosen, make sure it's something that the entire team can employ. Many lawyers may be accustomed to someone else setting up their calendars for them. In a time of flux, it's best if everyone understands how to run their calendar themselves.

2. Time Tracking and Billing Software

In 2019, Filevine surveyed 200 randomly-selected lawyers about their experiences tracking time and billing for their work. Respondents said, on average, they believed they failed to capture around 20 hours of billable work every month. 75% said it was too difficult to account for their time, and 70% said they felt under pressure from their firm to meet billable hour targets.

The looser structure of remote work can exacerbate all of these problems, making cloud-based time tracking and billing tools even more essential. They help you keep a meticulous record of your work and send out accurate invoices.

While there are a number of stand-alone offerings that cover billing and time tracking, these can also be included in your legal operating core (as with Filevine). By staying within one system, you enjoy the added efficiency of tracking your work within the same system where you do your work.



3. E-Signatures

In the past, when important documents had to be signed, did you ask clients to come into the office? Did you mail out a hard copy and expect your client to mail it back to you? Remote workers can benefit greatly from e-signature tools like [Vinesign](#), which allows clients to digitally sign securely (and quickly) from their mobile devices.

4. Digital Mailroom

Digital communication can easily transition to remote work. Older media are more intractable. Many firms are turning to digital mailrooms for help. Companies like [Earth Class Mail](#) provide a unified location to receive your mail, scan it into your cloud-based case management system, mail anything you physically need to your home office and shred the rest. They can even directly deposit checks you receive.

5. Virtual Reception and Intake

Remote lawyers and firms can retain the same call answering standards clients expect when they call the physical office. Virtual reception services can keep the phones running even through the most difficult transitions.

from the first call. Enabling rapid responses to potential clients is even more important at times of financial turmoil.

6. Online Texting

Lawyers and staff may want to stay close to clients without giving away their personal phone numbers. They also want to ensure that client communication is archived and accessible to other legal team members. Online texting abilities can form a core part of a unified communication strategy with clients. With [text-to-case file](#) technology, texts can also be turned into tasks with scheduled follow-up.

7. Online Faxing

Many businesses and institutions still rely on faxes to send and receive information. Rather than buying a fax machine for each remote firm member, you can use [online faxing tools](#) to send faxes remotely and keep a detailed record of all of your communications in one central location.

8. Secure Document Sharing

Remote legal professionals need to develop a strategy for sharing documents with clients, third-parties, service providers, and others. It must be robust enough to handle the large documents and various file types that legal professionals deal with, and should also be easy for the receiving party to understand and access. It must provide end-to-end encryption and security, protecting sensitive client information and ensuring regulatory compliance. A robust, secure, cloud-based solution will ensure maximum accessibility for legal professionals working away from the office—and will allow much faster file sharing than traditional methods.

One option is using [file sharing links](#) connected to some legal operating cores like Filevine. These allow you to send access to a document while retaining control over your information. You can choose whether to require an additional password for access, as well as set an expiration date to determine when the file will no longer be accessible to those with the link.

Both in-office and remote lawyers frequently rely on virtual intake services to ensure top service to potential clients, from the first call.

In addition to managing incoming calls, services like [Ringbird](#) offer full legal intake services. When a potential client is searching for a lawyer to represent them, you want to make sure someone immediately answers their call, engages with them compassionately, records their information, and sets follow-up tasks for lawyers and staff. Both in-office and remote lawyers frequently rely on virtual intake services to ensure top service to potential clients,

9. Voice Assistants

Are you accustomed to using dictation services to compose your thoughts? Now's the time to get comfortable with the voice assistants that exist within the tools you already have. Whether you use Siri or the other capabilities built into your PC or Mac, you can enable full dictation and begin to vocally compose your notes.

Also look into the way that AI assistants can help you with calendaring, research, and other tasks.

10. E-Payments

The transition to remote work is an optimal time to switch to e-payment tools. Lawyers working in an office can accept payments in person or through the mail, but remote workers need a virtual alternative. In addition, an e-payment tool can also lead to faster payments and improve realization rates.

E-payments are also preferred by clients, who are [already paying nearly half of their bills](#) and a quarter of their discretionary funds online.

Some services can also send clients payment reminders and allow automatic recurring payments. To read about some of the top e-payment tools for lawyers, check out [this article](#).

11. Remote Notary

Inside a physical law office, paralegals and other staff members are often authorized to perform notary services. But when a lawyer moves to remote work, the issue can become more complicated.

Remote notarization can help. In 2012, Virginia became the first state to allow notaries to authorize signatures through a video call. Since then, 15 states have followed their lead, with 6 more set to allow it in the future. When COVID-19 hit the US, many hold-out states made temporary allowance for remote notarization. For a frequently-updated list on where states stand, check out the [National Notary Association page on the subject](#).



12. Stylus Pen

If you're accustomed to working with paper copies of your documents, the move to remote work can be extra difficult. One way to ease your discomfort is to find the digital equivalents of your hard-copy habits.

Many lawyers find using a tablet with a stylus pen can make digital work more comfortable. You can still mark up your documents like you used to, without needing to first print them out.

13. Performance Dashboards

If you're moving your office into a new system, you need a way to measure how the change is affecting your practice and your firm.

Tools like [Audit Report](#) for Filevine can give you an overview of your entire firm and analyze the changes over time with the metrics that are important to your firm. They can show how each member is coping with the change, and raise warning flags regarding decreased performance before it becomes a bigger problem for your firm or your clients.

Much research has shown that, on average, [remote workers outperform office workers](#). By monitoring performance dashboards, you can address problems early on, and ensure your team is also harnessing remote work's benefits.

14. Online Community

Remote workers need to guard against professional isolation.

Reach out to bar associations, social media groups and hashtags, and other forms of the online community. Join the [LegalWFH group on Slack](#) which Filevine has created to enable ongoing conversation about the challenges faced by those working at home. Share what's working for you and learn from your peers. Look for online conferences and webinars that can help you bring new ideas to your crew.

The future of law will be mobile, paperless, and highly efficient.

15. Ensure you use unique Passwords for each of your remote applications.

One of the most important steps when setting up remote applications is to ensure you do not use the same password for each of these services. It is recommended to use a unique passphrase instead of a simple password to protect these accounts. An example of a passphrase is a series of short words that you can easily remember because they have meaning to you but they are difficult to guess. Such as, "GreenSoccerShoppingPie". In this example, it represents a color, sport, hobby and food you may enjoy. The National Institute of Standards and Technology (NIST) updated guidelines for passwords in 2018 and concluded, the most important aspect of the password or passphrase is how long it is, and its uniqueness from other passwords you use.

16. Secure Multi-Factor Authentication (MFA) or Two-Step Authentication for all business and personal accounts.

After ensuring you have a unique passphrase, it is important to check each of your remote accounts to ensure that MFA is turned on. This will add protection to help you guard against account compromise, password exposure and unauthorized access to your email system, document management tools and the Filevine Operating Core platform. Ensure you or your IT team has turned on these essential security features to protect your business and your clients.



CHAPTER 2

Shifting the culture

6 Adaptive Behaviors for the Remote Office

Good technology can move your legal office in the right direction. But successful teams are also undergoing a dramatic cultural shift. Not only do these changes support remote workers, but they can also enhance productivity, profitability, and work-life balance for all firms.

1. Embrace Centralization

When everyone's in the same office together, people might be able to get away with following their own idiosyncratic systems for scheduling, research, and client communication. But a culture of centralization brings coherence to a dispersed workforce.

Centralized systems and workflows keep the team accountable to each other, making sure no tasks slip through the cracks. Performance dashboards clarify the workload of different firm members, while centralized scheduling platforms help you understand each others' availability throughout the week.

One easy way to adopt centralization is to invest in a coherent legal operating core. But even if your firm patches together various systems, they can achieve firm-wide buy-in to a shared central process.

Centralization allows for greater collaboration. Beyond giving a boost to remote legal workers, this move to collaboration will position firms to succeed amid the [increasing complexity](#) of legal work. As this shared centralized process is adopted, be sure to fully document how things work at the firm. This will help future new hires to quickly understand the shared central process and collaborate effectively with other employees.

2. Extend Security Vigilance

Changes in your workflow can open up new security vulnerabilities. Lawyers working on personal devices and home or public Wi-Fi connections raise a new set of concerns for law firms focused on protecting their clients' information and maintaining client confidentiality.

A culture of centralization brings coherence to a dispersed workforce.

Ensure that any Wi-Fi connections that you use are trusted. This means that you should only connect to wireless networks that use strong encryption such as WPA2 PSK instead of the older WEP or WPA protocols. If a trusted Wi-Fi network is not available, consider using your smartphone's personal hotspot, following the strong passphrase guidance previously mentioned in this guide.

To enable remote work, firms must not only rely on secure technology but also inculcate a healthy security culture into their daily work. The transition to remote work is a key time to update security protocol and training materials. Remote workers need to be trained about keeping their devices encrypted, managing their passwords, using only authorized, firm approved software and physically securing their devices.

The Firm should ensure they are updating and reviewing their information security policies, procedures and privacy statements to incorporate new threats from the internet and adversaries that wish to cause reputational or financial harm. This includes extreme care for Accounting staff or Accounts Payable (AP) employees to ensure they remain very diligent when making any changes to existing methods performing wire or electronic funds transfers, or SWIFT system payments.

In addition, take time to train all firm employees on how to spot email phishing attempts, avoid unsafe websites, and avert attempts at [social engineering](#). Insecure email and password reuse attacks remain the most common threat vector for firms that lead to a data breach. Ensure email is protected with DMARC, DKIM, SPF and MFA. If you do not know what these are, make sure your IT team or outsourced IT service providers do this for you.

3. Gain Greater Competence Around Video Conferencing

Remote legal workers need to stay socially connected across distance. This goes beyond the specific technology they employ, and into their abilities as facilitators in a medium that may feel awkward.

When you can't share information as a casual byproduct of proximity, video conferences can keep everyone in-the-know. A few key practices can transform these meetings from awkward silence to engaged cohesion. Here are some recommendations:

- **Use the camera feature** on your calls and encourage others to do so as well. It allows you to read each others' body language and creates a deeper connection. It also discourages 'tuning out' in meetings, because others can see your own facial responses. As a by-product, it encourages everyone to maintain a professional appearance, which can have a positive effect on remote workers' morale.
- Don't take it for granted that people will practice the right **online meeting etiquette**. Take a little time to train everyone on basic usage, so everyone knows how and when to mute and unmute themselves, how to chime in and ask questions, and how to use other features that are included in your video conferencing platform.
- **Stick to an agenda**. If participants are drifting off into a tangent, gently but firmly direct the conversation back to the point at hand. Everyone will appreciate your ability to stay on target and conclude meetings on time.
- Sticking to an agenda doesn't mean being robotic or harsh. **Begin meetings with a brief ice breaker**. This will help people connect on a more human level and get the ball rolling. If you don't have any good questions in mind, pull one off of [this list](#).
- Consider scheduling in some weekly or monthly **'water cooler' talk**, where everyone can connect as people rather than strictly as workers. There are even [games specifically designed for remote worker socializing](#).
- Know when to pick up the phone or have a one-on-one meeting for de-escalation. Working across distance, we might not understand the body language and intention behind each message. **Address tension or misunderstandings early on**, before they escalate into harsher negative feelings.

- **Reframe home-based distractions.** If meetings with those who work from home are interrupted by children or pets, take a moment to admire and celebrate this glimpse into someone's life, and then refocus on the issue at hand.
- **Secure the Meeting.** New video conferencing applications have new security features to lock the meeting, provide secure passcodes to enter the meeting, audible sounds to alert the meeting organizer of new attendees and other security features to ensure meeting attendees are the intended parties. Becoming familiar with these settings will help employees follow best practices for meeting security.

4. Create Protocols around Messaging and Response Times

For many legal professionals, the biggest change with remote work is the way they receive messages. Rather than quick check-ins and chats at the office, they now receive all that information through phone calls, texts, emails, instant messages, and new updates and notes on their case management system.

Law offices need to think hard about how this change will affect their team members. An overflow of messages, and the expectation for immediate response, can lead to higher stress and anxiety, and decreased job satisfaction.

Neurologists have found that frequent phone multitasking might even [erode our brains](#). Reduced grey-matter in the anterior cingulate cortex of phone multitaskers makes it harder to make decisions and

control impulses. Some countries have even passed ['right to disconnect' laws](#), which ban bosses from sending work-related messages after-hours.

However, many decisions are time-sensitive. How can you ensure prompt responses for urgent issues—without driving everyone to distraction? **By creating clear expectations around sending and responding to messages.** These will be different for every firm, but here are some ideas:

- To cause the fewest distractions, **communicate as much as possible through the case management system.** Try to move all updates into your digital case notes, so people can address new tasks and questions on their own time, as part of their workflow. Adding deadlines to those needs helps each member prioritize incoming information.
- **Schedule a daily teleconference check-in** for legal teams, and encourage members to bring up questions then, rather than cluttering inboxes throughout the day.
- **Avoid communicating through email where possible.** The risk of user error with email is incredibly high, such as when you send an email to the wrong person or a client sends a confidential message in a 'reply all.' Hackers and spear-phishers are increasingly sophisticated and increasingly targeting law firms. And an overflowing inbox increases the chances of missing a message completely. **When emails are necessary, follow all security protocols.**
- **Data Loss Prevention (DLP)** is a tool provided in most cloud email systems which allows the firm to designate attachments containing Sensitive Personal Information (SPI) such as national ID numbers, Social Security Numbers, and other confidential data and flag it or prevent it from being sent outside of the firm. Using DLP can greatly reduce the risk of accidental data exposure via email.
- **Create sensible response time expectations for important emails.** This will allow anxious overachievers to relax, knowing they don't have to immediately respond to emails that come in late at night.



- **Clarify expectations for messaging apps.**
Collaboration apps like Microsoft Teams and Slack allow group discussions to take place in different channels. These include both important work discussions and ‘just for fun’ channels to socialize and build comradery across distance. Make sure everyone understands which are which, and the attention expected from them. Avoid making important team decisions through messaging apps, since those who are focusing on other issues at the moment won’t be able to contribute their thoughts.
- **Reserve phone calls, direct instant messages, and texts only for time-sensitive issues.**
- **Preserve all important information and data.** Avoid sanctions for spoliation of evidence. Add emails and text messages in the relevant case files.

For further ideas on establishing etiquette of workplace chat apps, check out the [Slack Etiquette Guide](#) created by Zapier, an app integration company that has been fully remote since 2011.

5. Get Serious About Disaster Management Plans

Lawyers are trained to obsess over worst-case scenarios and create tools to protect themselves and their clients from harm. With this skillset, it’s surprising that many firms did not have adequate disaster recovery (DR) and business continuity plans (BCP) in place when the COVID-19 pandemic hit.

For those still scrambling with a plan, here are a few resources:

- The ABA has posted a [Continuity of Operations template](#) specifically around the issue of pandemics, developed by FEMA.
- The Lawyers Mutual insurance company has a useful [Disaster Management and Recovery Guide](#) for lawyers.
- The U.S. Chamber of Commerce Foundation has a [“Resilience in a Box”](#) tool, with the top 20 steps they recommend for business preparedness.

Whether a firm is dealing with a global pandemic or a small, localized flood that has shut down their office for the week, the tools enabling remote work can be a key part of a coherent disaster management plan.

Creating a plan is just the beginning. Even firms that have developed an extensive DR or BCP plan often fail to follow it or can’t even find it when disaster strikes. Amid the chaos, make sure to create time to evaluate your response, build better solutions into future drafts and ensure the plans are available remotely and securely via the cloud if the office is physically shut down.

6. Create New Guidelines Around the Remote Office

Remote work brings its own set of distractions and disconnection. It requires new habits to stay focused, professional, and connected to others—while maintaining their work-life balance.

Law offices should clarify expectations around availability and overtime with their remote workers. Though remote work allows for greater flexibility, law offices should clarify if there are specific core business hours they want all members available. They can also set out expectations for professional appearance and behavior in teleconferences with clients and colleagues.

In addition to official policy, a culture of routine and discipline can help individual workers stay productive. For those working from home, tested tips for a daily routine may include:

- Take care of personal hygiene before jumping on your computer. Resist the temptation to immediately jump on your computer, and instead shower and brush your teeth first.
- Make your bed.
- Change out of your pajamas and into clothes that remind you that you’re a professional.
- Establish work goals for your day.
- Actively identify and avoid distractions (whether it’s external distractions from others in your home or the internal urge to check social media).

- For those who are caring for children while they're trying to work from home, creating a more flexible schedule can allow for childcare during the day. Sometimes this can mean saving certain tasks for early morning, nap time, or after their bedtime. Temper expectations of rigid routines and perfectly clean houses. Also look for online help, like virtual playdates, [creative activities](#), [fun movement and exercise guides](#), and [media content](#) for kids of working parents.
- Engage with one difficult and important task before checking your email.
- Leave time in the day to exercise.
- Schedule regular breaks to go outside and see sunlight.
- At the end of the day, analyze what you've accomplished.
- Close your computer and tidy your workspace.
- Close the door to your office (if you have one) and focus on connecting with your loved ones and caring for your personal well-being.

Many of these practices first became imperative for firms with the COVID-19 pandemic. But shifting the culture to enable remote work has the potential to improve legal work for many in the long term. Allowing remote work at law firms can give lawyers greater flexibility, a deeper engagement with their family, and save on commuting time (which means more time for wellness activities like exercise). For society at large, reduced travel means fewer emissions and less street congestion and noise. And the firm reaps the rewards of [increased worker productivity](#) among remote workers, as well as reductions in operational expenses such as real estate leases as office space needs decrease.



Case Study

How One Firm is Using Filevine to Support Clients Through a Crisis

When the COVID-19 pandemic hit, firms that had already invested in a cloud-based legal operating core were well-positioned to continue their practice amid the chaos.

One of these offices is [Bergeron Clifford LLP](#), a personal injury firm based in Kingston, Ottawa. Founded in 1999, they have 5 locations and forty staff members. Over the past year, they have developed new practices with Filevine to allow full remote work. This was spurred by the need to serve rural populations and clients with decreased mobility. But these same tools and practices are protecting their practice throughout this pandemic.

Bergeron Clifford began using Filevine in September 2016. Lawyer Kanon Clifford explains how it has empowered them to continue to serve their clients through the pandemic.

Cloud-Based Practice Management

Before Filevine, every time someone away from the main office needed a file, they had to send a request to their headquarters in Kingston. It typically took 2-3 days to get their documents. The alternative was using a cumbersome 3-step remote access process to reach their main archive. That meant downloading a program on their desktop, accessing a safety net feature, and finally accessing their remote desktop. The system was complex, awkward, and slowed down remote workers.

“Now with Filevine,” explains Kanon, “we just go online and log in. As long as we have the internet, we can access our files. The cloud-based aspect is amazing for us.”

Prior to the pandemic, just two workers were fully remote. Now the majority of lawyers and staff are working remotely. Staff members are working from their home desktops or have signed out one of the firm’s iPads or tablets.

Bergeron Clifford has integrated Filevine with its Office 365 tools, which they use for emails and scheduling. This automatically updates their Filevine calendars and gives them a coherent, central system to work on.

Because of its investment in a cloud-based legal operating core, the firm is continuing to serve its clients and provide continued employment for its staff, even through the chaos of COVID-19.

Centralized Document Management:

Spread across 5 locations, Bergeron Clifford wanted a centralized system for creating and managing documents. Over time, each location had developed their own templates and systems. With Filevine's **Document Generation tools**, they can now ensure the entire firm is operating on the same system, with consistency and meeting the highest firm standards.

The firm has customized folders in the Documents Tab in Filevine. They rely heavily on Filevine's **Edit-in-Place feature**. "It means we don't have to worry about fumbling through or downloading additional apps on our devices, and then re-uploading documents," says Kanon. "We can just work on it right in Filevine."

For collaboration outside of the firm, they use Filevine's **Guest Access** abilities. "We often work with employment lawyers, medical malpractice lawyers, or want to allow medical experts to look at documents in the file," says Kanon. Previously, they would copy and mail documents to people. With Filevine, access is immediately available.

The firm also uses Vinesign for forms that need signatures. "I can email documents to my clients, they sign them and email them right back to me," says Kanon.

Managing Workflows

"The ability to assign tasks and create deadline chains has been a huge lifesaver," says Kanon. "As lawyers, one of our biggest fears is missing a limitation period." But with Filevine's tools, they can easily stay on top of their workload and ensure nothing falls through the cracks.

The firm uses Filevine's **Advanced Reporting** to keep track of all tasks that have been assigned out. With the pandemic, the firm has created new regular reports in Filevine to ensure their team remains active, the work is completed on time, and clients receive excellent service.

Remote Intake

The firm uses a dedicated section in Filevine for their intake interviews, which are now conducted solely over the telephone or through video conferencing. "This allows anyone with internet access and a telephone to do intake at any location," explains Kanon. "This also allows our intakes to be put into our systems right from the start, with the potential client's information accessible immediately to everyone who works remotely."

Strength Beyond the Current Emergency

The tools that help Bergeron Clifford adapt to changes brought on by the pandemic will also be valuable when the world returns to calmer times. They have a deep commitment to meeting their clients on their own turf. “We’re often ‘out in the boonies’ serving our clients,” laughs Kanon. “We visit their hospital beds, their homes, and their farms.” Prior to Filevine, opening a new file meant printing out around 100 pages, bringing them to the client, and rifling through them to get all the signatures and information needed. “With Filevine,” says Kanon, “we just bring an iPad.” They can scan in documents or take pictures and immediately upload them to the file.

Further, Kanon believes Filevine has helped build a strong shared culture across all firm locations. “Everyone works a little differently or has a different mind about things. But now with Filevine we know there are set standards in place for documents, we can be confident that we approve of all the work.” This has also been beneficial in bringing on new staff members since they can be trained on a coherent, shared system.

Finally, Filevine has already helped the firm cut down their real estate costs. The firm must keep their files for 12-15 years after a matter has closed. Previously, this meant printing off everything and putting it in several banker boxes. These would be placed in storage units. “We were spending close to \$10,000 a year just on different storage units,” Kanon explains. Locating an archived file meant traveling to a storage facility and rifling through the boxes. With Filevine, they can archive a file with a click of a button and later search for archived files in Filevine.

Bergeron Clifford had the foresight to invest in a cloud-based legal operating core, centralized document management, and the other tools they need to support remote work. That means they are well-situated to serve their clients and support their staff, throughout the pandemic and well into the future.

CHAPTER 3

Serving Clients and Managing Staff in a Crisis

Developing Your Voice as a Firm

Remote legal work is a valuable capability in times of crises, big and small. But as the legal team disperses across remote locations, they must maintain a unified voice. This means creating a Crisis or Disaster communication team. The speed of messaging is crucial, which means the team needs to be small, agile, and with full authority to speak for the firm.

When a crisis hits, people are desperate for guidance, reassurance, detailed instructions, and honesty. This is the most important time for firms to communicate their values and vision. Finding the right ways to express resilience, strength, and compassion can help firms gain loyal team members and long-lasting community trust for the years ahead.

Part 1: External Communication

In the example of COVID-19, courts closed, deadlines were deferred, and many struggled to pay their legal bills. This only increased the responsibility to communicate with clients.

When it comes to communicating in a crisis, approach it from the perspective of your clients. What do they need to know from you right now? What are the problems they're experiencing? Every message should center around their needs.

Make sure your communication answers these questions:

- Are you still open?
- Are you accepting new clients?
- What services are you providing?
- How can you best be reached?
- Do you offer remote services? If so what kind?
- What precautions are you taking to keep your clients and community safe?

Only 58% of firms acknowledge the use of web-based software in their firms.

- Where can clients get the best updates regarding health and safety recommendations?
- How can we help you?

There are a number of locations where you can disseminate this information.

Use automatic document generation to create personalized emails for all clients.

Create your own disaster-specific webpage and link to it from a banner on your homepage.

Post on social media.

Create helpful blog posts addressing common questions your clients might have.

Update your Google, My Business profile with new hours and contact information.

In addition to widespread messaging, you'll need to connect with clients regarding how the crisis will affect the status of pending matters and cases. Determine how you wish to discuss financial concerns with worried clients as well, as financial and social turmoil can leave many clients strapped for cash.

Part 2: Internal Communication

How you communicate with lawyers and support staff during a crisis will also shape your success in the months and years that follow. Prompt and compassionate communication will encourage a stronger bond among coworkers and greater long-term loyalty to the firm.

Ideally, you already have a **communication plan** in place that you can follow. If not, quickly create a strategy for regular, prompt, and clear communication about expectations and policies.

This might be a **dedicated channel in your messaging app** just for important announcements. Some firms and businesses have developed **information hubs or wikis** to keep people informed. If employees know what to expect with a communication strategy, they will also be less likely to fall for harmful phishing scams.

Communicate quickly, even in the face of uncertainty. You might be tempted to wait until more definitive information comes through before you reach out. But even amid uncertainty, your team needs to know that their firm is at least working on answers.

When you provide updated policies and expectations, make sure you also explain the context around them. Share which trusted sources helped you make your decisions. Build unity around a shared concern for those outside of the firm as well—your families and community.

Examine your firm's legal obligations to workers. Consider all the workplace protections enshrined in the NLRA, OSHA, and ADA. The Society of Human Resource Management can also provide useful guidance. In the case of the COVID-19 crisis, the Society of Human Resource Management put together several [COVID-specific resources](#) for employers, while the CDC published its own [interim guidance for employers](#).

Be mindful of the way your treatment of support staff may differ from your treatment of lawyers. Are some being asked to endanger their health and well-being, while others are immediately allowed to work from home? Writing for Above the Law, [Molly McDonough reminds us](#):

Treating support staff as second-class citizens is a mistake. And how firms communicate with and treat their workers — all workers — will define them and reverberate for months and years to come.

When the crisis abates, take what you learn from your experiences with internal and external messaging, and update your disaster and crisis communication plan so it's available to your firm in future events.

CONCLUSION

Watching the next curve ahead

Under the shadow of COVID-19, law firms are transforming their industry. They are making dramatic changes to their practice precisely at the time when they cannot physically convene to make new plans, are under increased financial pressure, and face the added stress brought on by the global pandemic and social quarantine rules.

The situation is similar to that described by the Austrian philosopher Otto Neurath a century ago: “We are like sailors who on the open sea must reconstruct their ship but are never able to start afresh from the bottom.”

The reason we still dare call this a ‘No-Panic Guide’ is because lawyers are proving they have better tools at their disposal than ever before. No one is predicting easy years ahead for the legal industry, but with careful focus and smart changes, many firms will be able to weather these storms.

We’ve made this guide to serve legal professionals as they transform their industry. Chapter 1 focuses on specific tools and technologies law firms can use to transition to a remote workforce. Chapter 2 makes recommendations for changes to firm culture and behavior to better support remote work. Finally, Chapter 3 addresses specific ways to better serve clients and your workforce while working remotely in times of crisis.

Through the months and years ahead, whatever happens with the current pandemic, remote work will remain a key facet of the legal industry. We hope this guide is helpful as lawyers renovate their practice—one plank at a time.



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