

# (Re)Starting Your Law Firm

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A Checklist to Emerge from the Crisis or the Crowd



# Whether you're emerging from quarantine or setting out on your own, 2020 has become the year of the great equalizer.

Never before have law students, law firms, courts, and clients been so reliant on technology and innovation to ensure success. But of course an internet connection and a web camera is only the starting point; to plot a new path forward legal professionals will need a clear and recursive strategy to build a long-lasting foundation for the future.

The checklist we've compiled here—with input from former and current attorneys, as well as legal technology experts—is designed to help you craft a step-by-step map to start—or restart—your firm in the wake of unprecedented disruption.

The following sections correspond to each of the steps in the checklist. We've also included links to relevant resources. Have more questions or want to learn how Smokeball can help you reach your goals? We're here to help and [ready to get started](#).

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## Who is Smokeball?

Smokeball is legal software for life. Your life. Designed for and by lawyers, Smokeball legal management software automatically records your time, fills in your documents, and provides you with state- and practice-specific forms ready for editing. It was designed with your specific practice in mind.

We take care of your business so that you can take care of yourself while practicing law. We're ready to be your strategic partner, helping your practice accelerate your success, whether that be through growth, billable hours, or spending less time in the office. Let us work for you: for more information visit us at [www.smokeball.com](http://www.smokeball.com).



# Checklist for (Re)Starting Your Law Firm

	Completed	In Progress	N/A
<b>Business</b>			
Establish Goals (KPIs)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Consider physical location needs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Establish marketing and intake strategies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Establish virtual vs F2F policies with clients	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Labor</b>			
Establish WFH/remote work policies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Establish hiring goals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Evaluate diversity policies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Legal Practice</b>			
Leverage eSigning and eFiling practices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Establish billing strategy (e.g. hourly, fixed, contingent)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Offer just-in-time communication	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# Business

**Establish Goals** • Consider physical location needs • Establish marketing and intake strategies • Establish virtual vs F2F policies with clients

## Establish Goals (KPIs)

You won't know success until you define it, so the first step for any (re)opening law firm is to decide what success will look like. Start with finite time benchmarks—6 months, 1 year, 3 years—to know when to accurately self-assess. Then define key metrics that are measurable and workable; these are often called key performance indicators (KPIs), but you can simply call them goals.

Everyone's goals are different so don't stress about finding the right ones; instead measure what's most important to you, for example: monthly revenue, number of cases worked, number of hours worked (or not worked), etc. Finally, be flexible and kind to yourself. The goals you set in January 2020 are likely different than the ones you'll set in July 2020. Goals change as your firm does.

### Need more information? Consider:



**E-BOOK**

Ultimate Guide to Small Law Firm KPIs →



**E-BOOK**

The Three Pillars of Successful Small Law Firms →



**BLOG**

Using KPIs to increase law firm profitability →



**SMOKEBALL FEATURE**

Law Firm Insights →

# Business

Establish Goals • **Consider physical location needs** • Establish marketing and intake strategies • Establish virtual vs F2F policies with clients

## Consider physical location needs

Many law firms—like most small businesses—lease their space. The brick and mortar presence of a law firm has been a given for generations. However, with the rise of flexible workspaces (e.g. shared workspaces like WeWork) and telecommuting (i.e. use of mobile technology), a brick and mortar office is no longer assumed.

While you may not be ready to completely forego a static address for your firm, you may want to research and consider sharing office space with others, moving to a block schedule of “office hours,” and/or becoming a virtual law firm even if for only certain days or times of the year.

### Need more information? Consider:

 **E-BOOK**

Guide for Law Firms Working Remote and Working From Home →

 **BLOG**

How viable is the virtual law firm? →

 **BLOG**

How to start a law firm →

 **SMOKEBALL FEATURE**

Mobile App for Lawyers →

# Business

Establish Goals • Consider physical location needs • **Establish marketing and intake strategies** • Establish virtual vs F2F policies with clients

## Establish marketing and intake strategies

Whether you are starting a firm from scratch or reemerging after time in the shadows you will need to cultivate a list of clients and prospective clients by communicating with them frequently and effectively. Most small law firms have enough on their hands with practicing law and running a profitable business, but setting up a successful marketing and intake system is both important and easier than you might think.

At the very least every law firm should have a website, social media presence, email marketing program, and ratings platform presence (e.g. Yelp.) None of these platforms require much, if any, money, and all of them act as *de facto* advertising for your firm on search engines. Even if you have had a firm website for years, now is the time to reconsider the content that you put on it (e.g. blogs, news/updates, etc.) so that Google and Bing can more easily link to you.

### Need more information? Consider:



#### E-BOOK

[Social Media Workbook for Attorneys →](#)



#### E-BOOK

[Social Media for Personal Injury Attorneys →](#)



#### BLOG

[Four critical ways to modernize your firm's website →](#)



#### WEBINAR

[How Modern Consumer Habits Are Changing Law Firm Intake →](#)

# Business

Establish Goals • Consider physical location needs • Establish marketing and intake strategies • **Establish virtual vs F2F policies with clients**

## Establish virtual vs F2F policies with clients

Even if you're not ready to be a virtual law firm, chances are that at least some of your clients will now desire virtual consultation, if not representation. Video conferencing, mobile file sharing, and virtual hearings are here to stay. Many law firms will continue to offer face-to-face (F2F) open door policies and in-home visits to clients, but many clients will now prefer to shop for, and interact with, law firms the way they do shopping on Amazon.

Firmly establish the assumed methods of contact you'll have with clients. Put those policies into writing and clearly communicate them on your website and materials. The actual policy is up to you, but clearly stating how accessible you're open to being will be crucial for clients in late 2020 and beyond.

### Need more information? Consider:

 **E-BOOK**

Turning Crisis Into Opportunity →

 **E-BOOK**

The Future of Law →

 **BLOG**

How the coronavirus pandemic has transformed the legal profession →

 **SMOKEBALL FEATURE**

Video Chat that Saves Directly to Your Legal Matters →

# Labor

**Establish WFH/remote work policies** • Establish hiring goals •  
Evaluate diversity policies

## Establish WFH/remote work policies

Many law firms began working remotely and working from home (WFH) long-term for the first time in 2020. While it was a steep learning curve for many, and while many firms will always prefer employees work in-person, some firms may be open to extending a policy of working from home for their colleagues. If so, it is best practice to get a policy in place and set expectations early.

Needless to say that if a law firm is going to be virtual and decentralized it will also need a technology plan in place. Ensuring that all employees have access to laptops and software for case management, document automation, billing, video conferencing, etc. is a top priority. It is also not a given that employees will always have reliable internet service, so do your research on cloud software and choose a hybrid model (both locally installed and accessible via the internet) when possible.

### Need more information? Consider:

 **E-BOOK**

Choosing the Right Remote Cloud →

 **E-BOOK**

Is Legal Practice Management Software Worth It? →

 **BLOG**

Working Remotely: A practical guide for small law firms →

 **SMOKEBALL FEATURE**

Maintaining Control of Tasks and Deadlines While Working Remotely →



# Labor

Establish WFH/remote work policies • **Establish hiring goals** •  
Evaluate diversity policies

## Establish hiring goals

Whether you're starting your law firm and debating a full-time or part-time legal assistant, or restarting your physical firm and debating hiring summer associates or clerks, hiring is an essential task. This is especially true as law firms experience a backlog of casework resulting from the closure of courts nationwide.

Like setting business goals (KPIs), your firm should set hiring goals, delineating not just how many employees you need, but what you need them to do, how long you will need them, what success looks like for each of them, etc. Set immediate and annual goals so that you can periodically review your business's success and growth plan.

### Need more information? Consider:

 **E-BOOK**

Hiring and Managing Staff to Increase Law Firm Profitability →

 **BLOG**

Hiring your law firm's first employees, simplified →

 **BLOG**

Law firm hiring: How to get the most out of your new hires →

 **SMOKEBALL FEATURE**

The Future of Summer Associate Programs →

# Labor

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**Evaluate diversity policies**

## Evaluate diversity policies

The coronavirus pandemic will undoubtedly be the story of 2020 as its implications are felt globally across social, economic, and political realms. But the year has also seen tremendous social justice protests not experienced in a generation. As law firms are often the first contact for a public seeking justice, it is important for law firms to consider what role—if any—they want to play in vocalizing their policies on diversity, equality, and justice.

Many law firms and companies adopted “anti-racist” policies in summer 2020 that encompass hiring, training, and business practices. There are myriad resources available to research this approach. The ABA also has a [deep shelf of resources](#) addressing not just race, but also gender, disability, and other differences in the workplace.

### ABA Diversity and Inclusion Resources



#### DIVERSITY AND INCLUSION CENTER

Programs, resources, and information across the American Bar Association →



#### RACIAL EQUITY IN THE JUSTICE SYSTEM

Central clearinghouse of ABA-related information and resources →



#### TOOLKITS AND PROJECTS

Learn more about combating implicit bias in the profession →



#### GOAL III REPORTS

Monitoring ABA's progress in promoting full and equal participation →

# Legal Practice

**Leverage eSigning and eFiling practices** • Establish billing strategy •  
Offer just-in-time communication

## Leverage eSigning and eFiling practices

Many states already encouraged, if not required, eFiling (or e-filing) before 2020, but following the pandemic and WFH norm, the electronic communication and sharing of legal files between client, law firm, and court is more important than ever. Likewise eSigning (or e-signing) is an associated task that can not only speed up transmission of documents, it can also give clients an option to interact with your firm virtually.

In the same way that a paralegal can be a notary to save your office time, legal software that handles both your case management and eFiling/eSigning needs can make your firm more efficient and transparent. eFiling doesn't have to be seen as an extra step; by rolling it into one software and process it can become the new norm in your firm.

### Need more information? Consider:

 **BLOG**

eFiling tips for attorneys →

 **BLOG**

eFiling may be the key to unlocking post-COVID future of law →

 **SMOKEBALL FEATURE**

Simplified E-Signing →

 **SMOKEBALL FEATURE**

E-Filing & Electronic Signatures for Law Firms →

# Legal Practice

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## Establish billing strategy (e.g. hourly, fixed, contingent)

For decades certain areas of law practiced certain types of billing. However, those strategies are beginning to be rethought and the effects are being felt across every area of law. Before assuming the old ways of billing are right for your firm, research the trends in billing hourly, fixed amounts, or on contingency. As other firms change their strategies, clients may have new expectations that vary from your assumptions.

Regardless of the type of billing that your law firm employs, keeping accurate track of your hours worked is the first step in moving to collecting from your clients. Every modern law firm should be making use of automatic time tracking software. Even if your firm decides not to bill by the hour, accurate time tracking can help to ensure transparency for your clients and protect against judicial inquiry into ethical practices.

### Need more information? Consider:



#### E-BOOK

The Definitive Guide to Better Legal Billing →



#### BLOG

Law firm tips for capturing (and billing) more time →



#### SMOKEBALL FEATURE

Automatic Lawyer Time-Tracking →



#### SMOKEBALL FEATURE

Legal Billing Software →

# Legal Practice

Leverage eSigning and eFiling practices • Establish billing strategy •

**Offer just-in-time communication**

## Offer just-in-time communication

Working remotely may feel new to many, but mobile work—on laptops and mobile phones—is anything but. Clients and legal professionals alike are always connected to each other and their work via mobile technology. The result is that law firms need to offer instant and always-on communication to match the online experiences clients enjoy elsewhere. Where client portals once dominated legal technology, lawyers can now use mobile apps and one-time file sharing to keep clients informed and up to date.

Law firms also need to stay in touch with colleagues, especially if employees are working remotely. Likewise, law firms need to rely on their network of fellow law firms for just-in-time resources and feedback. All of this requires a tool—like [Smokeball's Communicate feature](#)—that can give law firms access to people and resources just when they need it. Make sure that your law firm is never closed even while you're away.

### Need more information? Consider:

 **BLOG**

What is the “new normal” for law firms? →

 **BLOG**

Group chat and file sharing for dispersed teams →

 **SMOKEBALL FEATURE**

Group Chat and File Sharing Feature Released in Smokeball →

 **SMOKEBALL FEATURE**

Secure Client Messaging and File Sharing →