

VIRTUALLY PERFECT PRACTICE

Making Your Law Firm Succeed

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Jean-Louis Law

ABOUT ME



- Founder of Jean-Louis Law
- Former Dancer
- Legal Commentator and Speaker
- Graduate of Duke Law School and NYU

Introductions

- Your Name
- Where are you currently?
- What stage of development is your law firm in? (Fill out poll)

Overview

- Start Your Law Firm
- Use Apps to Manage Firm
- Market, Market, Market

STEP 1

START YOUR LAW FIRM



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Types of Business Forms for Solo Attorneys

- Sole proprietorship
- Professional Corporation
- Professional Limited liability company

Which type of business form should you choose?

- Costs
- Legal liability
- Taxes
- Firm goals

Sole Proprietorship

- **Formation**
 - For the most part, automatically when an individual starts to conduct business
 - Ex. start taking clients
- **Advantages**
 - No state filing required to form a sole proprietorship, although many file a DBA (I did this)
 - Pass through taxation - owner reports business profit and loss on their personal tax return.
- **Disadvantages**
 - Owner remains personally liable for lawsuits filed against the business
 - This doesn't really apply to virtual lawyers (see Malpractice Insurance)

Professional Corporation

- **Formation**
 - Filing paperwork with the state
- **Advantages**
 - Independent legal and tax structures separate from their owners.
 - Helps separate your personal assets from your business debts.
 - Generally, owners (who are called shareholders) are not personally liable for lawsuits filed against the business (caveat for lawyers – see Malpractice Insurance).
 - Tax savings if you're taxed as an S-corp.
- **Disadvantages**
 - Double taxation - taxed on both corporate profits and shareholder dividends (solution – see S-corp designation).
 - Must follow certain formalities to keep corporate form/protection.

Professional Limited Liability Company

- **Formation**
 - Filing paperwork with the state
- **Advantages**
 - Independent legal structures separate from their owners.
 - Help separate your personal assets from your business debts.
 - Pass through taxation - taxed like a sole proprietorship or partnership.
 - Generally, owners (who are called members) are not personally liable for lawsuits filed against the business (caveat – see Malpractice Insurance)
 - As compared to a corporation, less formalities are required to run an LLC.
 - Tax savings if you're taxed as an S-corp.
- **Disadvantages**
 - Some states don't allow law firms to operate as PLLCs (ex. California).

Physical Address

- **Bar Association**
 - Some states, like NY, require law firms to have a physical address
 - See bar association has a virtual law program (ex. NYC Bar Association)
- **Co-Working Space**
 - I never used this, but have heard great things about WeWork or Greendesk
- **USPS or UPS Box**
 - If your state doesn't require a physical address, then get one.
- **Your Home**



Malpractice Insurance

- **Get it as soon as possible!**
 - Regardless of business form, you can always be sued for malpractice in your individual capacity.
- **Bar association discounts**
 - Many bar association provide affiliate discount codes.
- **Reduced/part time rate**
 - When first starting out, ask if your company will give you a rate for part time practice.



STEP 2

USE APPS TO MANAGE FIRM



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Google Suite

- **Gmail**

- Gives you access to all of their apps (including Calendar, Docs, Sheets, Drive, Hangout)
- I used this for client and team management for years.

- **Voice**

- If you need a phone number, you can get a free one here.

- **Boomerang for Gmail**

- Plug-in used to schedule when emails are sent and return emails to inbox (great for task management).

Client File and Team Management

- **Dropbox or Box**

- Use to store documents in the cloud

- **HelloSign or DocuSign**

- Use to execute documents (ex. attorney-client agreements)

- **Trello or Airtable**

- Project management software that can help you organize your tasks and assign them to your team

Calendar Management and Automation

- **Calendly or Acuity**

- Schedule everything (consultations, networking meetings, and team meetings) using these apps

- **Zapier**

- Create integrations between apps so they become automated (increases productivity)
- Ex. If someone schedules a meeting via Calendly, they get added to your mailing list

Client Payment

- **LawPay**

- Use to accept client payments via credit, debit, or E-check
- Because of software, you don't have to chase your clients for payment

- **PayPal or Stripe**

- Use in association with Calendly or Acuity to accept consultation fees

- **Bank Transfer**

- Use for extremely large transfers

Practice Management Software

- **Clio**
 - I use this for client billing and organizing matters.
 - They also have software for client intake
- **MyCase**
 - One of the oldest practice management software
- **Dubsado**
 - Great if you have a flat fee practice

Answering and Chat Services

- **Smith. Ai or Ruby Receptionists**
 - Both offer live chat and receptionist services
 - Smith.Ai also offers a free chat bot you can install on your website

STEP 3

MARKET!



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Legal Marketing Mantra

Marketing is constantly telling anyone and everyone what you do. You offer great services to others. They will not know about them or you if you remain silent.

This way you will be top of mind should they or someone they know have a need.



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Website and Online Groups

- **Website**

- Get a branding analysis completed prior to creating website
- Make sure your website can capture emails (offer a freebie)

- **Blog**

- Write blog posts about your particular area and post them on your website
- Build a niche if you can

- **Guest Blog**

- Ask someone with an established blog if you can contribute

- **Listserve or Facebook Groups**

- Join communities where your potential clients will be



Clients

- **Do great work for clients**
 - Clients will rave about you to their friends and colleagues
- **Let them know you appreciate them**
 - Send them a thank you card/email or a Starbucks card when they become a client
 - Send them something when they hit a business or personal milestone



Email

- **Mailchimp**

- Take steps to get emails to add to your mailing list
- When first starting, add emails from your personal email list
- Send out a newsletter every 1-2 months to keep people in your circle abreast of your activities.

- **Wisestamp**

- Create a bold, customized email signature

In-Person and Virtual Networking

- **Conferences**

- Attend conferences where you'll find clients
- Make sure to connect with attendees
- Collect as many cards/emails as possible and add them to mailing list
- If you're presenting, connect with other speakers

- **Business Cards**

- Make sure yours is memorable
- Once you create a mockup of your business card, create a screenshot and post it when you comment on posts on Facebook

- **Solo Attorney Groups**

- Find them! Great place to search for them is your local bar association.

Social Media

- **Repurpose content**
 - If you write a blog, repost portions of it on social media (ex. create an Instagram post based off of different paragraphs)
- **Create a social media calendar**
 - Use software like HootSuite to schedule when posts are posted
- **Makes sure content shows people who you are**
 - Clients will probably assume you're intelligent since you're a lawyer
 - They'll become your client if they like you



QUESTIONS?



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