
Preparing Your Law Office to Operate Remotely



A Guide by

 **CosmoLex**[®]
By Tabs3

The decision of whether or not to work remotely isn't always in our control. It could be a natural disaster, illness, or even a water leak in your office that's forcing you to go remote, but having the right setup in place is the difference between a smooth transition for you, your staff, and clients and a scramble to get the right technology and tools in place to continue working on cases.

This setup can offer benefits beyond daily remote work—off-hours requests and issues can also be managed more effectively this way. With the right tools in place ahead of time, you'll be prepared to work from anywhere.

If you need to get up and running remotely quickly, our tool roundup can be helpful in narrowing down your options.

The cloud & remote work

When it comes to working remotely, the cloud is always involved. Over the years it's become easy to manage and put into place and gives you access from anywhere on any device. It's also always up to date and backed up, which means you don't have to worry about running system updates or getting employees to run data backups if they're remote.

STORAGE

One of the most common ways firms use the cloud is for storage. There are plenty of options: Google Drive, Office 365, and Dropbox are among the most popular, especially given their high levels of security. The systems offer some big



benefits for law firms, including saving on IT costs and giving you data redundancy while letting you access files from anywhere.

COMMUNICATION

Communication tools are also essential when it comes to remote work. Having to call someone every time you have a question or hope that they see your email can quickly lead to frustrations. Instead, look to chat-based tools that create transparency and let you answer quickly while keeping focused on your work.

Some favorites that will let you communicate better with everyone from anywhere include:

- Slack, an industry leader that comes with a free option
- Microsoft Teams, a direct competitor to Slack with similar features and costs
- Teamwork Chat, similar features but best when used along with Teamwork Projects

TASK MANAGEMENT

Keeping track of everything you need to get done is always a challenge, no matter where you're working from. Cloud-based tools can help you prioritize, track time, and delegate - and keep your sanity.



Here are a few to help you keep that to-do list in order:

- **Monday.com:** featuring a board concept, easy-to-use interface, plenty of integrations, and automation features making it a solid choice for teams
- **Teamwork:** classic task management with not much else. Feature-rich on this though, with an excellent assigning system, time-tracking, and comment capabilities
- **Trello:** a Kanban-style layout and a great tool for those looking to get organized and manage tasks visually

VIDEO CONFERENCING

Even if you're not right in front of someone, that doesn't mean you don't get to see them. Video conferencing is a fantastic way to continue personal connections, even from a distance. It can also help keep people engaged and focused on the meeting - no more muting that conference call.

Check out:

- **Whereby (appear.in):** no logins, no downloads, no fuss - just a simple tool to do a video call
- **Zoom:** an industry leader with a free option (40-minute limit) and a robust

feature set, it's hard to go wrong with this option

- **GoToMeeting:** one of the oldest tools on the market, it's lasted for a reason, with every feature you could look for in a meeting tool

PASSWORD MANAGER

Staying secure is especially important when working remotely, as not every network is equipped with the same features as an in-office one. A password manager can help protect sensitive data and prevent issues. There's also the added bonus of not having to reset your password every time you forget it.

Take a look at:

- **LastPass:** free to use, with a robust set of features including multi-factor authentication and IP restricted access
- **1Password:** many similar features to LastPass, but with a more user-friendly interface
- **Dashlane:** a new one in the business space, they also offer credit monitoring



PROGRAM BLOCKERS

Stay focused! It can be easy to get distracted, particularly if you're working from home. Keep on track with these tools:

- **StayFocused:** a simple Chrome extension that allows you to restrict the time you spend on a certain website
- **Productivity Owl:** another Chrome extension that has a slight twist on the "stay focused" mindset and plenty of options
- **Cold Turkey:** a desktop app (just in case you don't use Chrome) that has many of the same features

VOICE OVER IP (VOIP)

You need to be able to take office calls even when you're not actually in the office. With VOIP you'll also get lower costs, increased accessibility, clearer voice quality, and more flexibility. There are a lot of opinions out there when it comes to the best, but here are the top contenders:

- **Jive:** another tool in the LogMeIn family, along with GoToMeeting
- **RingCentral:** an industry leader, but much like other VOIP choices at this level, all have similar feature

- **Google Voice:** will get the job done, but not the most reliable system

LEGAL-SPECIFIC SOFTWARE

There's a lot that goes into running a law firm: accounting, billing, matter management, email tracking, client communication. To keep your practice fully operational, check out legal software that can help:

- **Clio:** practice management software, requires a separate accounting software that isn't legal-specific
- **CosmoLex:** integrated, all-in-one solution that combines practice management, billing, and accounting
- **TimeSolv:** a pure billing solution

EFFECTIVE REMOTE WORK

To be able work remotely and keep your efficiency at in-office levels, it's critical to have the right pieces in place. Hopefully, the list above gives you some guidance on where to start if you haven't already. If you'll be working remotely long-term, also keep in mind the importance of creating a solid schedule, using video conferencing wherever possible and limiting distractions.

About CosmoLex

CosmoLex is a leading legal practice management solution that is trusted by thousands of law firms across North America. CosmoLex is a single solution that lets solo legal professionals & small law firms manage their practice, billing, AND accounting all in one login, on any device, at any time. CosmoLex users can eliminate the need to maintain multiple programs because CosmoLex does it all -- including time & expense tracking, billing, business accounting, trust (IOLTA) accounting, calendaring, task, email & document management, even secure client communications -- in one web-based application. Please visit www.cosmolex.com for more information. Questions or comments about this publication or the topics involved can be addressed to info@cosmolex.com.