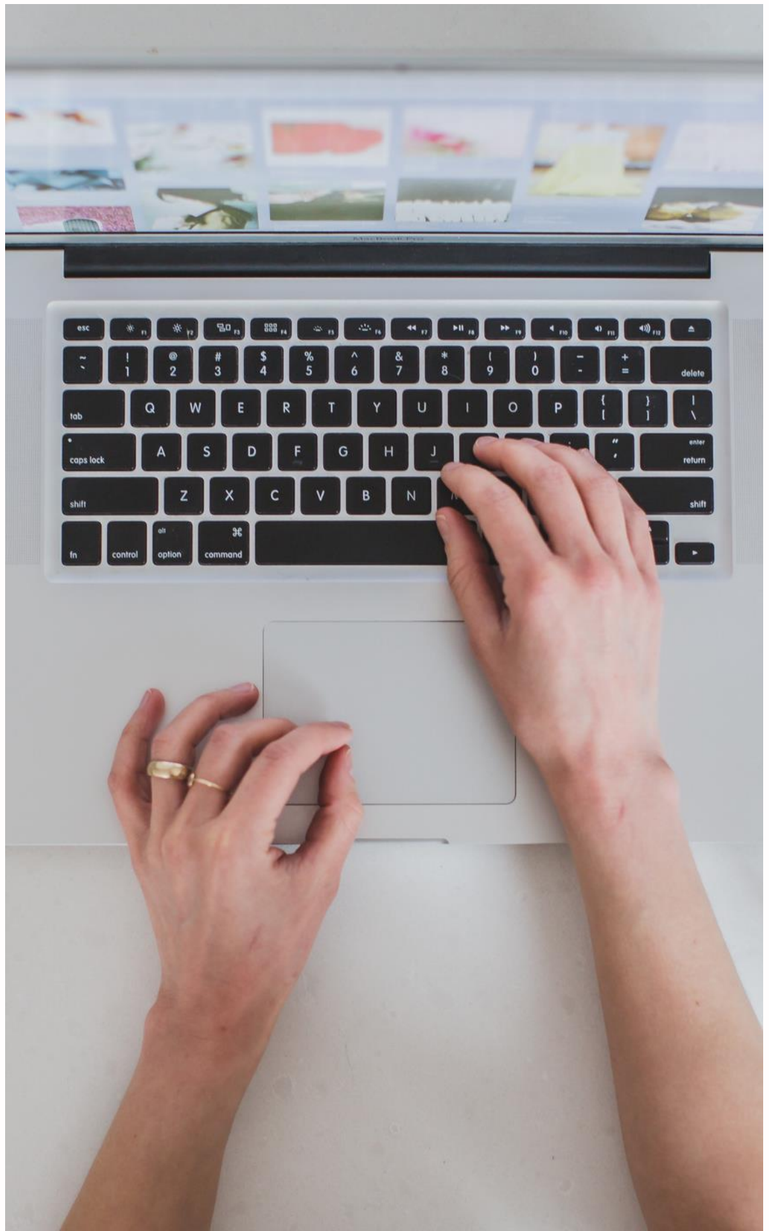
WEALTHY®
WOMAN LAWYER

Tech Guide to Automate Your Small Law Firm

100+ Tech Tools and Resources for Your Use



AUTOMATE YOUR SMALL FIRM

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Introduction

Are you ready to leverage automation and other resources to scale your law firm business to and thru $1M? If so, then I think you will enjoy this tech guide I've created for you as a companion to the Scale to 7 Law Firm Systems Solution program.

In the Scale to 7 Law Firm Systems Solution program, I teach you step-by-step how to implement the 7 Essential Law Firm Systems every law firm business needs to be profitable, sustainable, and able to operate without the business owner's day-to-day involvement in operations.

Once you have done the "systems thinking" in your business so you know exactly what changes you need to make to begin pulling yourself out of the day-to-day operations, you'll now need not only a team of A+ employees and/or contractors but also the right tech tools. This is where this guide comes in handy.

I trust you will find it useful.

Client Attraction & Conversion Systems

Your Client Attraction and Conversion system technology tools are centered around marketing and legal service sales. Done right, you'll attract not only more clients, but better clients, which is the goal. For more information on marketing, grab a copy of my book on the subject: The Wealthy Woman Lawyer's Guide to Law Firm Marketing in the Virtual Age: 10 Bold Actions to Take Now to Attract Your Ideals Clients with Total Ease

My general recommendation is to outsource your marketing with the exception of content you must create yourself as the "face" of the firm, such as raw video content. While it may be a good use of your time to record a video, it is not a good use of your time to edit it and post it to all your social media. It's also not a good use of your time to create memes, write email blasts to send to your list of past or current clients, or create your own Google, FB or Instagram ads. Still, marketing efforts like these must be done.

Until you have crossed over the $1M mark in gross revenue, I do not recommend you hire in-house marketing employees. Instead, outsource marketing projects to virtual assistants specializing in the social media you are using, and/or to marketing vendors.

Virtual Assistant Services

SOCIAL MEDIA MANAGEMENT & ADMIN

- HireMyMom
  - Great for hiring Virtual Executive Assistants. You make the deal directly with the person you are hiring.
- Equivity
  - This is an agency so instead of hiring directly, you'll be hiring the agency. It can cost a bit more, but you don't have to do the vetting of the individual. And if anything goes wrong, they can pull in someone else on the team.
- Upwork
  - My go-to for Graphic Designers, Copywriters, Creatives, Paralegals.
- Zirtual
  - Email Management. They offer other services, but I like that they have people who just do email management.

Bulk Email Services

FOR SENDING OUT E-NEWSLETTERS

Bulk email services are not "Outlook" or "Google." Bulk email services are email services required when you send out emails to a list of people—such as your past clients, current clients, or attorney colleagues, or people who have "opted in" to your list on your website to receive a "lead magnet."

I have seen clients increase the number of prospective new client leads just from sending out email blasts (aka newsletters) two times a month.

If you choose to do this, you will need a bulk email service. If you try to use your regular email service, you will get blacklisted. Nobody wants that! Bulk email services are designed to help you comply with anti-spam laws.

Bulk Email Services

FOR SENDING OUT E-NEWSLETTERS

Here are some of my preferred options. I'd hire a V.A. with experience in the tool you choose to help you design and post your emails. I'd also hire a content writer to help create the content. Upwork.com is a good place to find writers with experience working with attorneys and law firms. If the first one doesn't work out, don't give up! There are good ones out there. You just may need to be persistent to find the best one for you.

- ConvertKit
- MailChimp
- ConstantContact
- ActiveCampaign
    - Also a CRM

Online Intake Forms

If you have a case management system software then, most likely, there's already an intake tool built-in. However, if you do not use a pre-built case management system for law firms, and you are wanting to cobble together your own preliminary intake form and automate it, you might consider using some other tools. Gravity Forms can be used to create a preliminary intake form from your WordPress website. Acuity Scheduling (and I'm sure Calendly) lets you create an intake form through your online scheduling app. Zapier is a great tool to help you integrate various software tools.

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- Gravity Forms
- AcuityScheduling
- ClioGrow
- Lawmatics

Online Advertising, Marketing, Webdesign

I highly recommend you outsource your website design and online advertising. There are literally thousands of companies out there who can design a website for you in all price ranges. You also can hire writers to help write the content—most web design companies do not do this for you unless you pay an additional fee. Here are three website design and online marketing companies:

ZIIIametrics
Array Digital
Everest Legal Marketing

If you would like to hire a Google Ads Certified company to help you with setting up a Google Ads funnel, I recommend my own company, D. Frederick Media and Marketing, LLC. We only create Google Ads funnels for law firms. You can book a consultation here.

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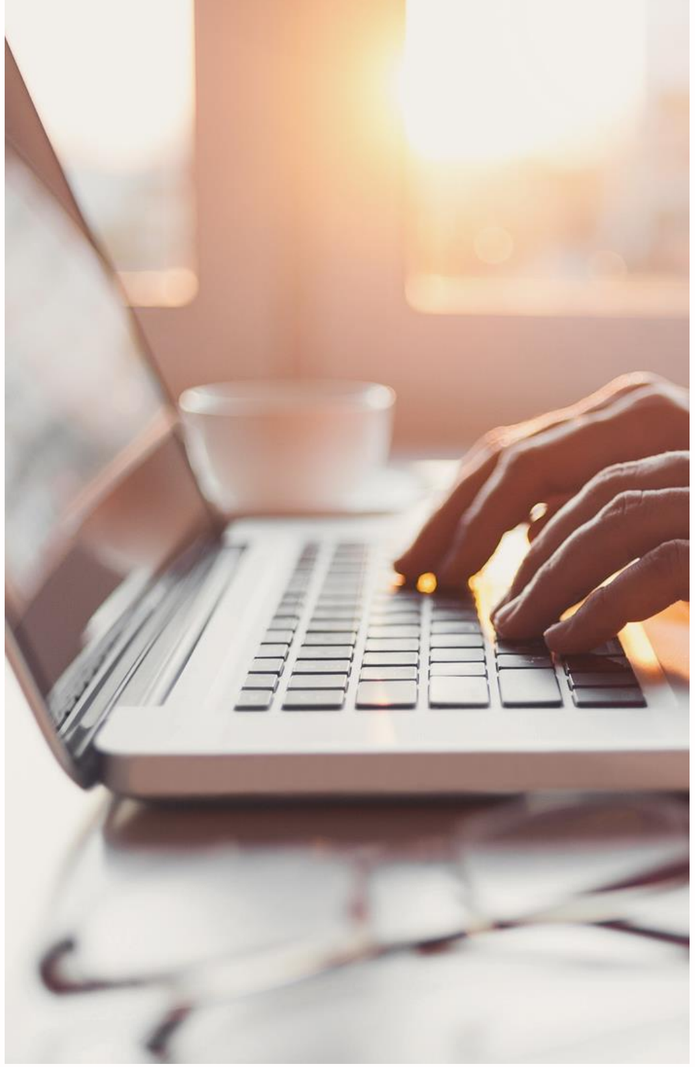


Wordpress Website Security / SEO

No matter what company you choose to hire for website design services, be sure to ask them about security for your website. The more traffic you begin to drive to your website, the more likely your site is to be targeted by hackers and spammers. Here are the tools we recommend if you have a WordPress site (which also is our preferred website platform).

- iThemes (security)
- Askismet (anti-spam)
- Yoast Pro (SEO)
- BackupBuddy (backups)

Client Intake & Onboarding Systems

If you do not have an in-house receptionist OR you want to train your receptionist to be your Client Care Specialist and you need someone else to handle the busy phones, collect preliminary info, and schedule consultations, then here are some reception services I recommend.

REMOTE RECEPTION SERVICES

- Smith.ai
  (Disclosure: Wealthy Woman Lawyer is an affiliate of Smith.ai)
- Lexreception
  (Disclosure: Wealthy Woman Lawyer is an affiliate of Lexreception)
- Back Office Betties
- Answering Legal
- Lawyerline
- Ruby Receptionist

Automatic Scheduling Services

If you would like to provide the ability for prospective clients (or current clients) to schedule consultations with you, your Client Care Specialist, or anyone else on your team, without having to call your office then I recommend these online scheduling services. They easily allow you to funnel different types of meetings to pre-reserved/blocked times. If you love "time blocking" as much as I do for a productivity tool, then I highly recommend you incorporate this type of service into your business.

- Calendly
- Acuity Scheduling
- Setmore
- Doodle

E-Signing Services

If you like to send your contract to prospective clients who are ready to commit to being your client through email (and who doesn't in this new, virtual world), I recommend an electronic signature service. I've used all three, and prefer Adobe, with HelloSign as a second fav.

- HelloSign
- Adobe
- DocuSign

Legal Payment Services

Anything you can do to make it super-easy for your clients to pay you, you need to do. LawPay is hugely popular and has a ton of 5-star reviews. Also, if you still are refusing to take credit cards because you are worried about the fees, or you are trying to pass these fees onto your client, I recommend you rethink your stance on this issue. These days, most people are looking for convenience. I, for one, will not work with any business that makes me jump thru hoops to pay them. I don't think I'm alone in that.

- LawPay

Video Conferencing / Meeting Services

I'm a fan of Zoom for video conferencing. I've used many services as I've been invited to many, many podcasts where the hosts selected alternative video conferencing services and it was not a positive experience from my end. I hosted my own podcast using Uberconference for a while. It was great because my team could "pick up" my recordings and I didn't have to send them to them afterward, but the video quality was awful.

I love Zoom for all the reasons. They poured a ton of money into improving it during the pandemic, and it shows. Meets all my needs for online meetings, podcast recordings, video-making, etc. Still, there are many options. GoToMeetings has been around forever for audio conferencing. You do you but if you meet with me, it likely will be on Zoom.
(P.S. I've included a recent NYT article about the best video conferencing services, so check that out.)

My pro secret: Krisp.ai. If you WFH and don't want anyone to hear your barking dog, meowing cat, crying baby, loud-talking spouse, the yard guys, or the Amazon delivery gal, get Krisp.ai. It is a software you can add that drowns out all background noise but keeps your voice nice and crisp! This has been a life-saver for me. You are welcome.

- Zoom
- GoogleMeet
- Article
- Krisp.ai

Client Service & Fulfillment System

I anticipate most of you already have a case management system you are using. Again, there are a plethora, so do your own due diligence. In the module on Client Service and Fulfillment in my Scale to 7 Law Firm Systems Solution program, I've set out some criteria when selecting a good case management tool.

If you do not have a case management system, here are some popular ones. Some are better for certain practice areas than others. For instance, FileVine and Smokeball are two popular systems for personal injury attorneys. My recommendation is to set up consultations with vendors and get them to walk you through demos. Try more than one to see what works best for you.

- Clio
- MyCase
- Practice Panther
- Filevine
- CosmoLex

Project Management

ALTERNATIVES TO CASE MANAGEMENT

Maybe you are like some other attorneys and don't want an out-of-the-box case management system designed specifically for law firms. If that's you, know there are other tools you can use to put together your own. Here are three project management tools. Trello also may be an option if you are a very visual person, although it's designed for "creatives." One thing to consider, though, when putting together your own system is SECURITY. You want to make sure whatever tools you choose will keep your clients' information secure. Egnyte appears to be a good, secure solution for online collaboration, so could work well for keeping client files, data, and documents. The other project management tools might be good for using with managing your teams.

- Dubsado
- Asana
- Monday

Secure Collaboration

- Egnyte

Team Communication

If you want to communicate throughout the day with a remote or distributed team, here are a couple of options to help you do that.

- Slack
- Microsoft Teams

Document Collection

Great tools for allowing clients to upload documents to your firm (if you don't already have this option in your case management system.

- PipeFile
- Collect

Cloud Computing & Storage Services

Everyone loves “the Cloud.” Be mindful, though, of security issues with materials stored in the Cloud. Check the security tools section of this document for more information.

- DropBox
- OneDrive
- GoogleDrive
- Clinked
- Box
- ShareFile

Client Review Collection Services

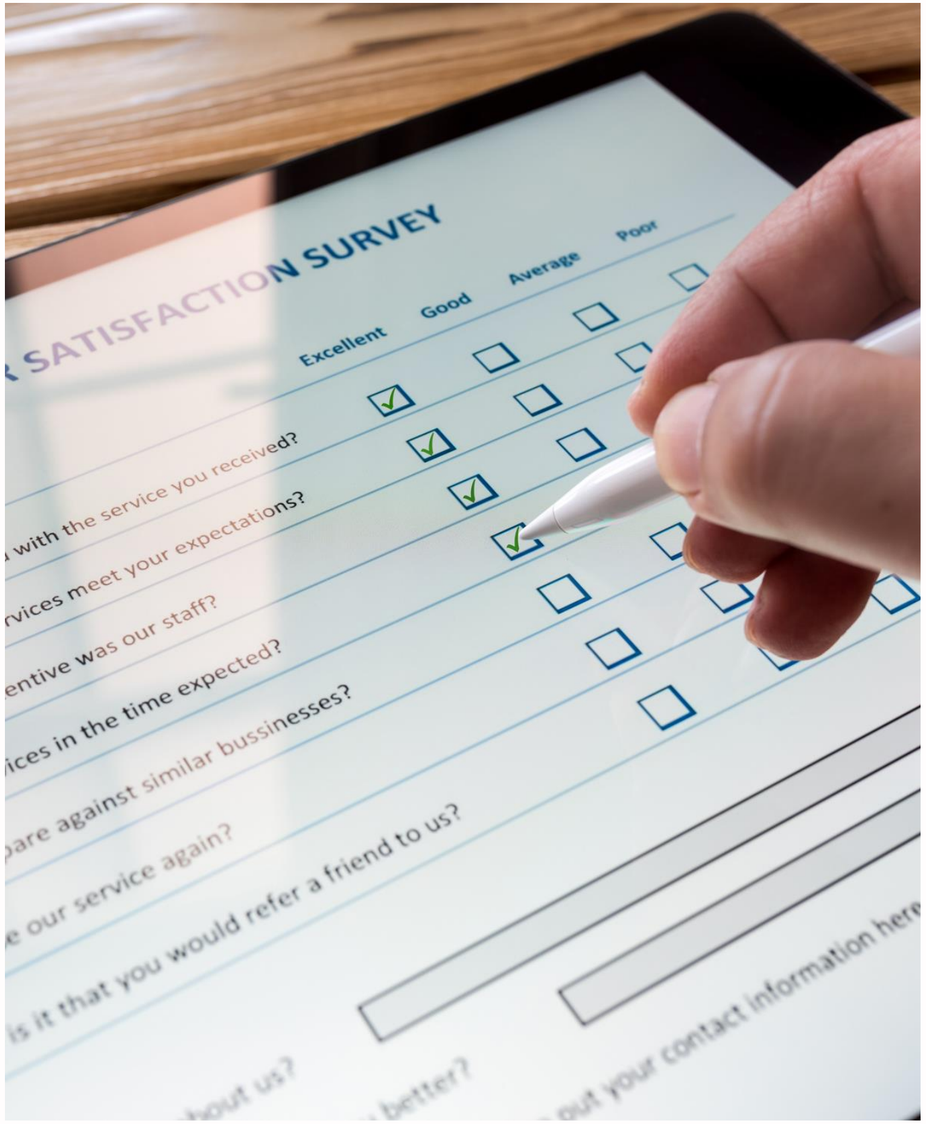
Here are some services to help you automate collecting reviews. As these services can be costly, it may make sense for you only later down the line after your revenue has increased enough to invest in them. At the very least, after a positive outcome, hand your clients an iPad with Google opened right to the spot where they can leave you a review. Sending emails with the link to the review site can work but does not always. Think about your own habits. How many times has someone asked you for a review and you've forgotten or failed to follow thru? You may want to set up (or, more correctly, have your marketing person set up, an automatic email sequence to ask for reviews multiple times).

- Get More Reviews
- BirdEye
- TrustPilot

Client Survey Services

If you listen to the module on Client Service and Fulfillment in my Scale to 7 Law Firm Systems Solution program, you'll see I recommend "training" your clients to provide feedback throughout the course of their engagement of your firm. Here are tools I recommend you use to automate these functions.

- Delighted
- Podium
- SurveyMonkey



Email Management Services

Is your email like an albatross around your neck? Either hire an email management V.A. from a service like Zirtual, or use an AI (artificial intelligence) tool that you can "train" to help filter and sort your email.

Of course, **my clients know that I recommend keeping ALL client communications within your case management client portal and training your clients to NOT email you. Why? Because the larger your team grows, the more likely important correspondence and attachments will get lost in someone's email. Also, it's cut your email down by 85%. Lastly, if you have ever had a client "reply all" to OC correspondence, then you know one of the dangers of emailing clients.**

Email with the court and OC but train your clients to communicate through the portal. It's great for them AND for keeping all their info confidential and secure. Plus, they can access all the documents you've filed on their behalf, therefore, saying your team time responding to these types of requests.

- SaneBox
- Front
- Zirtual

AI Tools for Attorneys

As of August 2023, there are several AI tools that can be beneficial for lawyers and law firms. Here are some of the best AI tools specifically designed for legal professionals:

- ✓ **Casetext**: An AI-powered legal research platform that helps lawyers find relevant cases, statutes, and legal analysis quickly and efficiently.
- ✓ **Ross Intelligence**: An AI-driven legal research tool that uses natural language processing to help lawyers find relevant case law, statutes, and secondary sources.
- ✓ **Kira Systems**: An AI-powered contract analysis software that helps lawyers review and analyze contracts, identifying key clauses, and potential risks.
- ✓ **Luminance**: An AI platform for document review and analysis, which can be used for due diligence, compliance, and contract management.
- ✓ **Lex Machina**: An AI-driven legal analytics platform that provides insights into judges, lawyers, parties, and the subjects of cases, helping lawyers make data-driven decisions.

AI Tools for Attorneys

- ✓ **Neata Logic**: An AI-driven platform that enables lawyers to automate repetitive tasks, such as document drafting and client intake, through the creation of expert systems and chatbots.
- ✓ **Everlaw**: A cloud-based AI-powered e-discovery platform that helps lawyers quickly identify relevant documents and collaborate on complex legal matters.
- ✓ **Judicata**: An AI research tool that analyzes and summarizes legal briefs, helping lawyers quickly identify key arguments and authorities.
- ✓ **ChatGPT**: ChatGPT is a chatbot and virtual assistant developed by OpenAI.
- ✓ **PatentPal**: Generative AI for Intellectual Property Automate mechanical writing in your patent applications.
- ✓ **AI Lawyer**: Say goodbye to routine tasks. AI Lawyer automate your legal research and paperwork, granting you more free time.

These AI tools can help lawyers and law firms streamline their work processes, save time, and improve the quality of their legal services. However, it's important to note that AI should be used as a complementary tool to human expertise and not as a complete replacement for legal professionals.

Research Services

There are alternatives to LexisNexis and Westlaw.

- Casemaker
- Casetext
- Fastcase
- Tracers
- LexisNexis
- Westlaw

Writing and Editing

I write. A lot. And I type pretty fast. Mistakes happen, and these two tools have made a huge difference for me. They'll not only catch mistakes but improve your writing as well. Highly recommend. P.S. Pay for them. Free versions are not sufficient.

- WordRake
- Grammarly

People Management Services

People management requires systems for hiring, training, reviewing, termination and a whole lot in between. Here are some tools to help make that easier for you.

JOB POSTING SERVICES

- ZipRecruiter
- Indeed
- Glassdoor
- LinkedIn

Team & Personality Assessments

Personally, I would no longer hire anyone before they take a personality assessment to see if they have the right personality for the job and for the team. There are many—Meyers Briggs, DISC, Enneagram—I prefer the two I've listed here. Clifton Strengths is my fav. You want to make sure you read and understand which of the four categories their top 5/6 strengths fall into. Are the Strategic? Relationship-oriented? Executors? Or Influencers? You are not looking for people who mirror your strengths, you are looking for people who compensate for your weaknesses (depending on the position).

- Kolbe
- Clifton Strengths

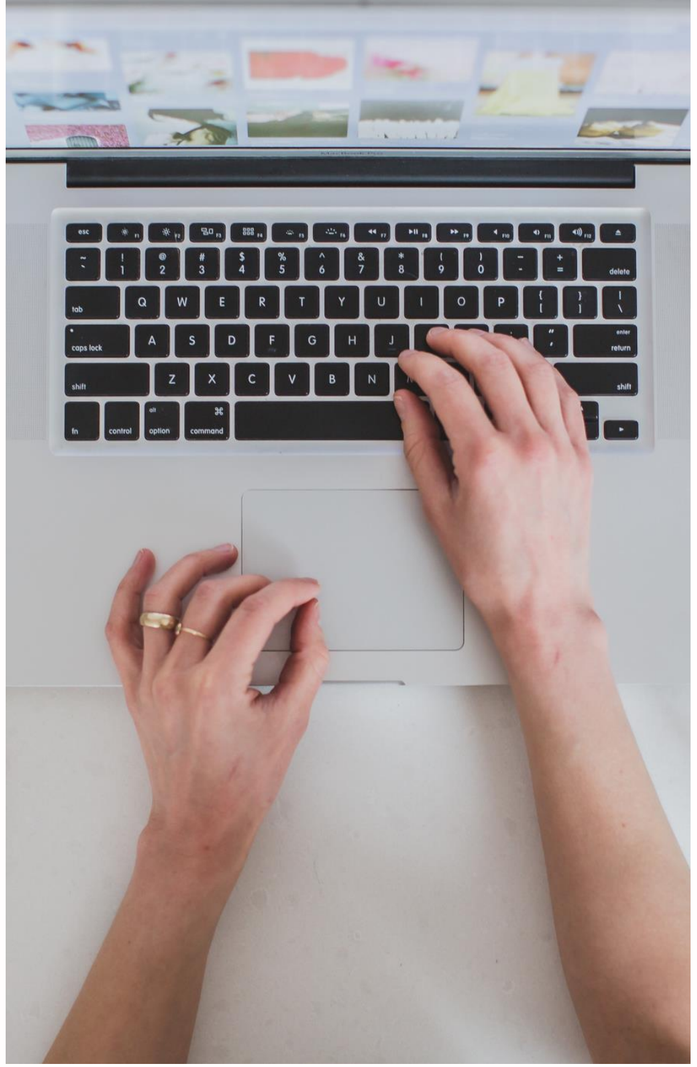
Employee Handbook

If you do not have an employment lawyer you can pay to review your employee handbook for compliance with state and federal laws (or to just write the thing for you), you should probably **hire one**.

As your law firm grows and you begin to hire more and more people, the law firm's potential legal issues around employment will become more complex. How should you calculate vacation time in a way that is fair and equitable? What is your policy for sick days or personal (mental health) days? What is your Covid-19 policy? What is your social media policy? Do you have a probationary period? Is there a dress code (yes, even if meeting virtually with clients or the court)?

Your employee policy and procedures manual is critical to protect you and the law firm. Here are some services to help you create one.

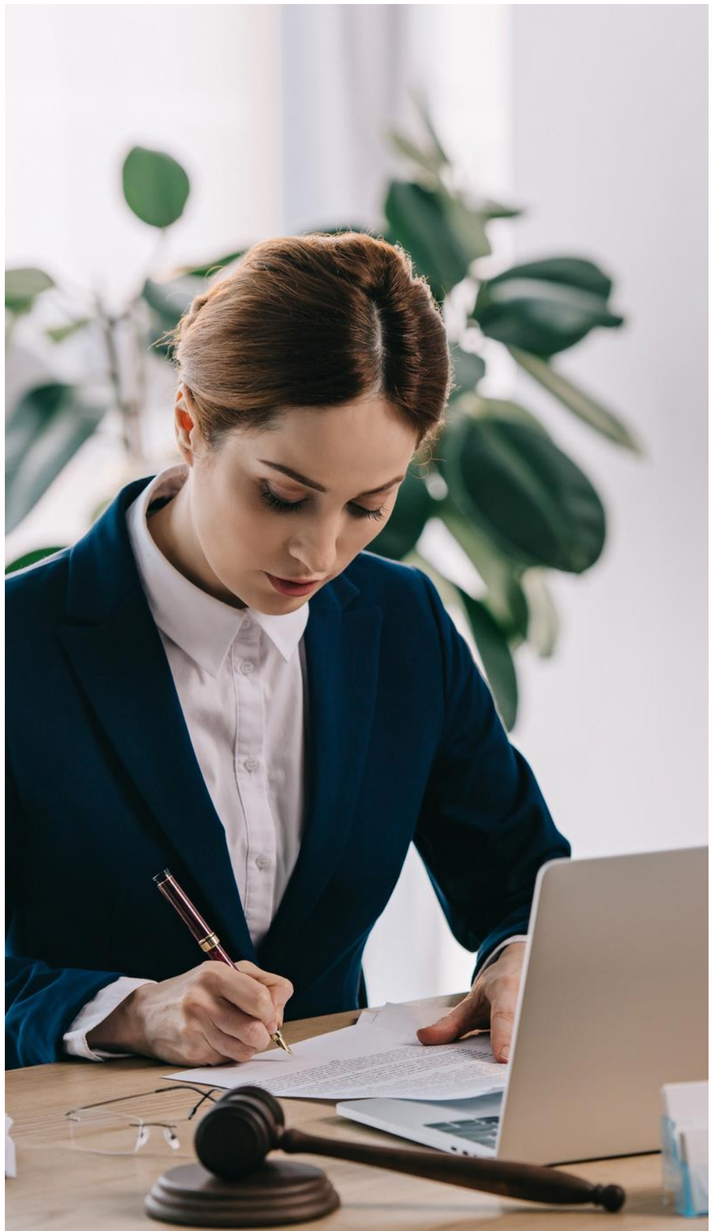
- LegalNature
- Handbooks.io
- FormFindr



Virtual Paralegal Services

The Great Resignation has made hiring great employees much more challenging. Whether you have a virtual law firm or a brick and mortar one, you might decide to incorporate virtual paralegals into your team. For some of my clients who've lost several employees within a short time span, virtual paralegals have been a lifesaver. Others have found it just makes good sense for some of their projects to be outsourced to virtual paralegals. Here is a list of virtual paralegal services. There are many, but this may be a good starting point for you.

- Virtual Paralegal Services
- Virtual Paralegal Pros
- Digital Paralegal Services
- Best Virtual Paralegal



Contract Lawyer Services

I only recommend LawClerk.Legal as a service that manages contract attorneys. There are a couple of others out there, but I do not refer to them because my clients have not had good experiences with them. However, the best way for you to find contract attorneys may be to post in attorney social media groups. Hiring individuals who do contract work (like military spouses, for instance) may be a more cost-effective choice. You don't get the vetting LawClerk.Legal provides but you can work directly with an individual contract lawyer you find through social media and negotiate terms. Still, I like LawClerk.Legal, and recommend your check it out.

- LawClerk.Legal

Technology Management

The biggest concern that should be on your radar as a law firm owner is the security of your clients and the firm's data. Cybersecurity is a booming industry for a reason: because cyber attacks on all manner of businesses and organizations have increased dramatically in the past decade. Do not think just because your business is "small" that you won't become a victim of hackers. As an attorney and law firm owner, you MUST take security seriously. Here are some recommendations to help you do just that (See pages 27 and 28):

Encryptedn Email

- Proton Mail
- MicroSoft Exchange Encryption

Password Management

- LastPass
- Dashlane
- 1Password

System Security

- MicroSoft Windows Defender
- BitDefender

Encryption Services / Software

- VeriCrypt: (to encrypt local hard drives—your physical computers)

Virtual Private Network (VPN)

- Whole network (at the router)
- Proton VPN: (for local)

Financial Management

If you are not using an accounting software to manage your business finances. Stop what you are doing right now and go hire a bookkeeper to help you get your books in proper order. Using business accounting software, the services of a bookkeeper to keep information current and correctly categorized, and the services of a certified public accountant—especially a tax strategist—are critical to your law firm businesses success. Your “books” are your road map to success and the importance of managing them properly cannot be understated. Here are some recommendations if you are looking to put together a financial team.

Financial Professionals

- Bookkeeping Confidential
- Your Core Solution
- Lael Tax

Financial & Accounting Software

- Quickbooks Online
- CosmoLex
- Xero

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Key Performance Indicators Calculators

Here are some fun calculator tools (for entertainment purposes only) to help you estimate your profit percentage increase from one year to the next, your personal net worth and an estimate of what your business is worth if you were to sell it. Of course, these are free calculators (of which there are many). If your desire is to sell your business, then you will want to hire an attorney or company that specializes in business valuation.

PERCENTAGE INCREASE CALCULATOR

- Calculator Soup

NET WORTH CALCULATOR

- Dave Ramsey Net Worth Calculator

BUSINESS VALUATION CALCULATOR

- Nationwide

Conclusion

I do hope you've enjoyed this presentation and that you will find this tech guide useful. If you are eager to scale your law firm business to and thru $1M in gross annual revenue, and to create a profitable, sustainable business designed to free up your time as well, then I invite you to:

1. Grab a copy of my new book: The Wealthy Woman Lawyer's Guide to a Systems-Driven Law Firm: 7 Essential Systems You Need to Take Back Your Time, Avoid Burnout, and Create Lasting Wealth

2. Sign up for the Scale to 7 Law Firm Systems Solution program where I guide you, step-by-step, through the process of creating a systems-driven law firm business with total ease.

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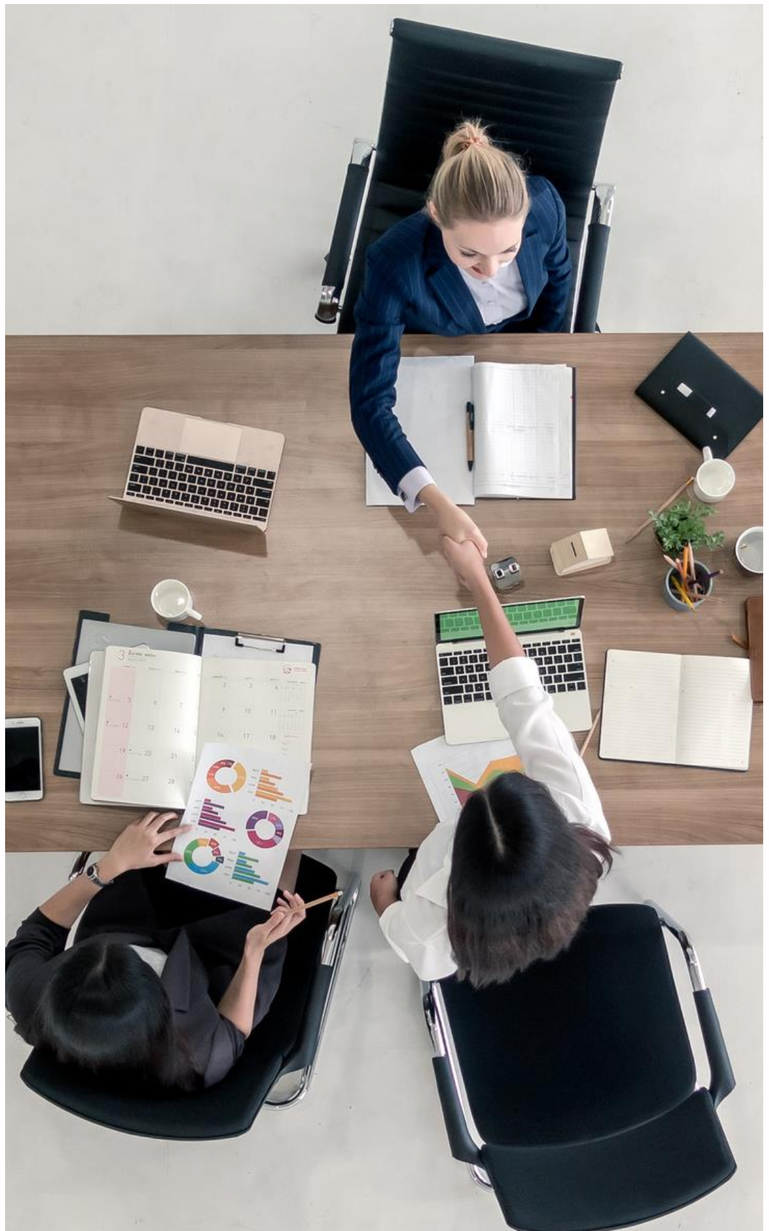
Thank you!