

Taking Your Remote Office To The Next Level (/Article/2021-November/Taking-Your-Remote-Office-To-The-Next-Level)

If you want to cut the cord on the office lease forever, here's how

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Do you remember what your typical day looked like before March 2020? Perhaps such a day included:

Driving to the office, a courthouse for a hearing, or to a deposition;

Overpaying for parking in a crowded lot or garage;

Spending an entire day sitting in an office;

Stressing at the end of the workday about picking up kids, figuring out what to cook for dinner, and thinking about all of the household chores and work that still need to be done when you get home;

Being in bumper-to-bumper rush-hour traffic at the beginning and end of the workday.

If you are dreading returning to that kind of grind, there is another way: Embrace the remote "virtual" office. Running a successful modern PI law practice requires hard work, dedication, adequate understanding of technology, organization, a strong network, and deserving clients with good cases. A modern law practice no longer needs to be tied to any specific location based on fixed, expensive leases. A modern law practice no longer needs to require trusted staff members to come into an office every single day to make sure they stay on task. A modern law practice can go fully (or partially) virtual by harnessing the flexibility created by the technology of today to maximize efficiency and cut down on costs.

Why should I consider a remote office?

Since my own law firm opened in 2014, I have learned more and more about the many benefits and challenges of running a virtual office. When set up correctly, a remote-work arrangement allows a law practice to operate with greater flexibility, efficiency, and cost savings than a fixed location office.

Imagine being able to run your law firm, communicate with clients, appear at court hearings, conduct depositions, and prepare for trial from anywhere in the world: the guest room of a parent's house during the start-up phase, while in a hotel room in Hawaii, Vancouver, or Cabo San Lucas during downtime on a vacation, or the ultimate home office created during the height of a global crisis. All of these places, and many more, have served as the "location" of my law office over the years. I could easily work at times that suited my schedule, rather than being constrained by the usual business hours of 9:00 a.m. to 6 p.m. in an office building. I have saved tens of thousands of dollars by eschewing the traditional office workplace on a day-to-day basis, while finding creative and cost-effective solutions for the times that require the use of a physical office location.

How do I run a remote office?

You are now intrigued about going virtual or have already decided to go virtual, but have questions about how to run your office remotely. Here are some questions I faced and the solutions I found.

How do I get mail?

First, try to minimize the amount of mail you receive. It cuts down on the delay of mailing, the cost of storage, and the time spent scanning and filing documents. Ask opposing counsel and clients to agree to send court filings, discovery, and other documents via email as much as possible. You can cite California Rules of Court rule 2.251(c)(3), which actually requires parties to serve most documents via electronic service when documents need to be filed electronically:

(c) Electronic service required by local rule or court order

[. .]

(3) Except when personal service is otherwise required by statute or rule, a party or other person that is required to file documents electronically in an action must also serve documents and accept service of documents electronically from all other parties or persons, unless:

(A) The court orders otherwise, or

(B) The action includes parties or persons that are not required to file or serve documents electronically, including self-represented parties or other self-represented persons; those parties or other persons are to be served by non-electronic methods unless they affirmatively consent to electronic service.

Second, find a mail-receiving service that works for you. I have at various points over the past seven years entered into a “virtual office” lease with established companies, paid other law firms to use their office address, and become a member of an organization that offers mail storage as a benefit. You can explore organizations such as LawWorks and JusticeHQ, which allow members to use their offices to receive mail as one of their many member benefits. Companies such as Regus, Premier Workspaces, and Barrister Suites offer virtual office leases in which tenants can use their address as a mailing address, in addition to other benefits such as limited conference room use and unlimited use of common areas, for a monthly charge.

If you just need a mailing address and no other perks, consider using a P.O. Box or paying a someone that is already locked into a long-term fixed lease at a physical location to use their mailing address. You can also explore companies that receive, scan, and electronically store your mail, such as Earth Class Mail and VirtualPostMail.

What are my options for in-person meetings?

When Zoom and phone calls are not an option and you need to meet someone in person, there are plenty of places that may work for that in-person meeting. For meetings with clients or opposing counsel, I have rented a conference room at Regus for a relatively small fee when I had used that company for my virtual office. For focus groups of more than a dozen attendants, I have used the CAALA office. I also have very generous friends and mentors who have offered their office space on an as-needed basis for depositions or meetings. Court reporters and mediation offices also often have meeting space especially for loyal customers who ask nicely.

For client meetings, I often offer to meet at their homes, which provides multiple benefits including instant appreciation by clients and often more productive meetings. Also, you can always meet with people over lunch at a restaurant, a beverage of your choice at a local coffeehouse or bar, or even a park, which is where I had one memorable two-hour client meeting at his request.

What kind of technology do I need?

Beyond a reliable computer with wireless internet capability and a good smartphone, attorneys committed to a remote office should invest in certain hardware, software, and cloud platforms. My first purchase as a solo attorney was a Fujitsu ScanSnap scanner, which is still running strong after nearly seven years of use and likely close to 100,000 pages scanned. I also purchased a black-and-white printer, which comes in handy for light print jobs. Other hardware to look into are tablets like iPads or Microsoft Surface, portable hotspot devices, and external monitors.

Software such as Microsoft Office and PDF editors such as Adobe Acrobat Pro are very important investments. I used to try to get away with using free word processing, but quickly realized how difficult that made sharing documents with colleagues. The time saved by purchasing and utilizing the right software more than makes up for the price tag.

Even when I was a solo attorney without any staff, I set up my files to be on cloud platforms such as Google, Dropbox, and Microsoft SharePoint. I have had the misfortune of hard drives crashing in the past, which would have been devastating if the files had not been backed up. Now, I also use cloud-based platforms for project management to help organize case files with my team. Larger firms can utilize cloud-based management platforms geared towards lawyers such as Clio or FileVine.

What should I do with physical items?

While many items can be digitized and discarded, certain items such as original documents and evidence need to be kept safely and securely in their physical form. When those items are relatively small, any number of solutions will do, including a closet in your home or even your car for a short period of time as long as those locations are safe and maintain the confidentiality of your clients.

What about larger items that may need to be stored over a long period of time? In those situations, you may need to rent a storage unit, which may generally range in price from \$100 per month to \$300 per month depending on the size and location of the unit.

How will my team stay productive without an office?

I have a team of four people working for my firm. I get asked regularly how I monitor the productivity of my team. We have worked completely remotely since March 2020. I purchased work computers for each team member and set up a VOIP telephone system. We send daily emails, instant messages, and text messages. We call each other constantly. We maintain a firmwide calendar and utilize a shared project management platform. We hold meetings once a week. Even after explaining my firm's procedures, inevitably the question turns to "how do I make sure they are working hard when I am not there to breathe down their necks?"

The key to running any firm larger than one person is trust. You trust your team with your clients and your business. They should reflect your firm's core values and add to the success of your firm. You have to hire good people. You have to treat them well, hold them accountable to deadlines, and empower them to want to work hard. If you cannot trust them when they primarily work from home, then I have a hard time imagining that you could trust them when they work in an office. This advice holds true for firms working remotely as well as firms that continue to meet every day in an office.

Concluding thoughts

The coronavirus pandemic served as a catalyst for significant changes in the way law firms operate. I imagine many more attorneys have been forced to lean into the virtual law firm model since Stay-at-Home orders were put into place by state and local governments in California in March 2020. Whether you welcomed working from home or begrudgingly accepted the need to do so, law firms of all sizes can implement the lessons learned from operating remotely to save on costs, enhance productivity, and reduce stress.

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