



The Quick Action Guide to Take Your Law Practice Virtual

Learn a new way to find, engage, and serve delighted families and business owners, virtually, and still develop a genuine personal connection and charge the same fees as if you are serving in person.

Meet your Trainers



Ali Katz (NLBM Founder)

Ali serves business owners all over the country, virtually. She is paid between \$2,500 to \$5,000 per month for her virtual business services, and her clients are thrilled to be able to get her strategic guidance on their businesses, all remotely.



Bonnie Bowles (NLBM Accelerator Co-Founder)

Bonnie lives in Colorado and serves families in Texas and New Mexico, and has for many years. She is paid between \$3,000 and \$5,000 on average for her virtual estate planning services, so if you think that you need to discount to serve virtually, you do not! In fact, clients are happy to pay your "affordable premium" fees, when you serve as we teach.

Most Common Questions

Why is it important to go virtual as soon as possible?

The importance of setting up your virtual office cannot be understated today given that many communities are dealing with local COVID-19 transmission. Operating your law firm as a virtual office is best practice to protect your own health and to assure your community that you are taking the CDC guidelines for social distancing seriously – and to be able to continue to serve your community.

What do we mean by your “virtual” office?

You will hold your prospect and client meetings virtually, online and ideally with a webcam so you can nurture personal connection with your prospects and clients. (We don't mean you work from home in your pajamas, though you can do all the back office work wearing PJs, if you want.)

Should you cancel the in-person meetings already on your calendar?

Keep these appointments as scheduled and hold them as virtual meetings. Your prospects and clients will appreciate your quick pivot! And, be understanding if people want to push their meetings out while they get their bearing. We anticipate that people will be ready to focus again on forward planning (rather than present moment planning) by the week of March 23rd, so do not be surprised if people reschedule their appointments. Just be understanding and reschedule them and be prepared to serve them virtually.

Will prospects be less likely to engage my services if all meetings are virtual?

Absolutely not! If anything, your prospects and clients will appreciate your sensitivity to the current environment plus your rapid pivot to providing legal services in a way that meets prospects and clients where they are.

Is virtual notarization possible in my state?

A lot of states have made moves toward remote or virtual notarization, but there is no overarching best practice here as this is mostly new and novel across the board. Some states have already implemented virtual notarization (specifically Texas, Virginia, and Nevada), but some of the statutes don't come online until July, so we'll need to be creative. We've got a discussion thread happening in our forum, and will be available to support you with making your decisions on how best to handle this piece there.

How can I still be a leader in my community if I am not “out there” in-person?

We are in the midst of a huge opportunity for service as leaders in our communities. You ARE a trusted advisor, if you choose to be. And, if you have not been in the rhythm of educating your community by way of seminar and in-person presentations, know that educating your community online is hands-down the most value you can offer to your community. And second, to practice the social distancing necessary right now, now is the time to start educating your community virtually through online presentations.

It's All About Vision First

“ *My Virtual Practice Adds Tremendous Value to My Community, and Supports + Wows My Clients* ”

If You Commit, You Can Do It.

1

Commit to the Vision

Remember, Your Law Degree is Your Most Valuable Asset When Used to Serve Your Community as the Leader You Are.

2

Get Clarity On Your Time/Money Goals

How Soon Do You Want to Be Ready to Engage Clients Virtually at \$3000 to \$5000 Each For Estate Planning Services, Virtually?

3

Get Clear On Just the Right Next Step for YOU

Yes, This Takes Some Work to Set Up. And, It's Well Worth It To Be Able to Use Your Law Degree to Serve Clients With a High Value Service Most People In Your Community Need ... and To Provide the Services Virtually. We'll Make It As Easy As Possible.

So Let's Look at How Bonnie Runs Her Virtual Practice Serving Estate Planning Clients



Big Picture

I live in Denver, Colorado, and serve my clients virtually who live in Texas, New Mexico, and rural Colorado. And with the current environment, I plan to serve all my clients virtually. I've had the question from lawyers before about how much I discount my estate planning fees when I do virtual meetings, and the answer is, I don't! The value my clients receive is the same whether we meet in person or virtually. Focus on the value to your clients as the determining factor for your estate planning fees. And, keep in mind that serving clients virtually is even more valuable than them having to come in and meet with you in person. You are making planning more convenient and easier for them to do the right thing for the people they love.

Step One Educate Your Community Virtually

After educating 676 members of my community through in-person seminars, I decided to take my education online to reach even more people. I started hosting webinars online so that community members could access this important information in the comfort of their home or office, even before the current environment where we're navigating COVID-19 challenges. Now I've educated 858 families (and counting) prospects via webinars and have served \$1.9M in client revenue exclusively from webinars, with the same success rate in helping my community understand the need and value of estate planning for their family and loved ones.

The lesson

- True genuine connection during webinars can happen online, virtually, with or without webcam. (So if you are camera-shy, that's okay!) What matters is authenticity and a desire to serve.

Resources to have

- **Webinar script:** Webinar that educates, empowers, inspires and invites people to take clear next steps to schedule a private session with you to discuss their family dynamics and assets and to create their plan.
- **Email automation and online scheduling:** System for prospects to RSVP for your webinar, send emails before webinar to encourage people to show up live, and send emails after the webinar to encourage watching the recording + booking a private session.
- **Webinar hosting service:** Hosting platform, such as Zoom or GoToWebinar to host and broadcast webinar.

Step Two

Promote Online Scheduling Of Your Private Session

During my webinar, after I've helped my viewers focus on learning from me and giving them value in having their eyes opened about all the aspects of protecting their family and loved ones with a plan, I explain my three-meeting process and the expectations, and I share my online scheduling link that includes the option to schedule a virtual appointment (because the biggest mistake we see lawyers make is educating their community but being unclear or silent as to how your viewers take the next steps. We promise, they do want to know! So tell them, and make it easy). I have the exact script in place that ensures my prospects understand this meeting has the same expectations as if we were meeting in person.

The lesson

- Online scheduling is easy, efficient, and prospect-oriented. You'll hear pings on your phone of emails coming in that prospects scheduled before your webinar is over!

Resources to have

- **Online scheduling:** System for scheduling, such as Calendly, Acuity, ScheduleOnce or AppointmentCore. We use AppointmentCore.
- **Virtual Intake Process:** A series of emails + videos that go out to the people who schedule with you to prepare them for their meeting, and a virtual pre-meeting preparation package with homework that can be completed online. We use Infusionsoft to send our emails, ClickFunnels to host our video pages, and Formstack to host our online pre-meeting homework, which is the Family Wealth Inventory & Assessment/Personal Resource Map.

Step Three

Conduct Your Virtual Planning Session

I conduct the Planning Session via Zoom, using a webcam (must use the webcam!) just as if we were meeting in-person. It's imperative to make that personal connection, and start with presenting the agenda just as I would in a in-person meeting, and running the meeting exactly as I would an in-person Family Wealth Planning Session. The only difference is to explain upfront how the virtual process works, end-to-end, especially virtual signing and making payment – those are the two biggest questions your prospects will have, so anticipate those and answer them before they ask. I have found this sets prospects at ease that I have the right technology setup to facilitate virtual services and that I have a plan in place to serve them efficiently and effectively.

The lesson

- Set your prospects at ease by having the right technology and expectations setup to serve them efficiently and effectively, online.

Resources to have

- **Online video conferencing:** We use Zoom
- **Scripted Process:** Family Wealth Planning Session, Agenda to Present, and System for Quoting Fee and Designing Plan + Structure for Signing + Final Meeting Process to Build Relationship for Long-Term Maintenance of Plan.

Step Four

Conduct Your Virtual Signing Ceremony

I conduct the Signing Ceremony exactly as if I were presenting a final, ready-to-sign estate plan in person. The only thing that happens after the Signing Ceremony is the actual signing in front of a notary, which would normally be handled with a mobile notary, but which we need to get creative with in this world of social distancing. I review their plan in the exact order of legal documents I always do, in a professional looking format on the screen, I explain how they can indicate any minor adjustments to their plan, and how to sign in front of a notary when they receive the package with their printed-and-tabbed estate plan, and what to do with the originals from there.

The lesson

- Signing Ceremonies are equally valuable virtually + in-person. Know your state's laws for virtual notarization and design a process around helping your clients get their documents notarized swiftly.

Resources to have

- **Signing ceremony process:** Scripted process, including full color diagrams, to walk clients through the plan, so they fully understand their plan so they could explain it to the people they love.
- **Virtual notarization process:** This is where you're going to have to get creative. And at all times, ensure you are in compliance with your state's laws on valid execution and notarization of estate planning documents. Virtual/remote notarization will likely be your biggest challenge. This is 100% state dependent, and you need to ensure you comply with your state's notary requirements at all times. We will help you figure this part out when you join us in our Bootcamp.

Step Five

Conduct the Final Meeting + Build Relationship

Once I've compiled the clients' original documents into their estate planning binder, I send it to my client and then hold their Final Meeting virtually. I review their binder together with them, along with crucial details they need to know about what happens going forward, how they update their estate plan and personal resource map, when needed, with my ongoing membership maintenance and support program, and show them the letters we will send to the people they've named in their plan so everyone knows what to do when something happens to them, review their remaining asset transfer needs and how to complete them, and their Kids Protection Plan®, if they have minor children. I also encourage them to review the Legacy Interview prompts in their binder, and hold their Legacy Interview during the meeting, virtually, recorded for posterity, so we are ensuring they pass on more than just their money.

The lesson

- Third meeting is where a relationship is created. Most lawyers don't do this. And this is why plans fail. You can truly serve at the highest level here.

Resources to have

- **Final meeting process:** Scripted process for final meeting, letters to send to all people named in the plan with their roles and what to do if something happens to client, inventory of assets (personal resource map), Kids Protection Plan®, updating/maintenance program and process for passing on the clients' intangible assets.

How To Get Virtual ASAP

Embrace Technology

Just as you need a physical office to hold in-person meetings, you need technology platforms to hold virtual meetings. Each technology platform you need to run your virtual practice comes with a cost. There is a cost of the technology itself and the cost of setting up and using the technology. If you are stressed about the cost, just remember that the more clients you can serve, the more money you make, when you are charging “affordable premium” fees for your services of \$3,000 to \$5,000 on average per estate plan. And, you should focus on educating your community and engaging and serving more clients, and invest in the fastest/easiest setup of your technology.



Understand Technology Is Not What You Are Trained To Do

We're about to go over all the “whats” of your technology: what functionality you need and what functionality is nice to have. Before we dive in, let's center on why you are here. You are here because you are a trained lawyer, a pillar in your community, a changer of your clients' lives when you help them protect their family wealth and legacy. You are NOT a tech expert nor are you expected to be. Listen and learn from the perspective of understanding the different facets of running a virtual office, not from the perspective that you intend to sit down, sign up yourself for each account, do all the setup, integrate separate systems, etc. Read to the end to hear how to get support in setting up your virtual office so you can focus immediately on serving prospects and clients (not getting bogged down in your tech stack).



Technology Tools You Need

Now that we know (1) we need technology to run our modern virtual practices, and (2) you are not, and are not expected to be, a technology expert, let's discover what technology capability you need, and how you can get these established in your practice ASAP with our guidance.

Features/Functionality You Need	What NLBM Accelerator Team Uses	Other Options
Online Scheduling	AppointmentCore (included complimentary with Accelerator)	Calendly Acuity ScheduleOnce
Webinar Hosting Service	GoToWebinar (included complimentary with Accelerator)	Zoom
Landing Page Builder	Infusionsoft (included complimentary with Accelerator) Clickfunnels (included complimentary with Accelerator) Wordpress	Leadpages
Online Forms for Intake Process	Formstack (included complimentary with Accelerator)	Formsite Typeform (maybe) Clio
Virtual Meeting Hosting Service	Zoom GoToMeeting (included complimentary with Accelerator)	
Client Relationship Management (CRM) System to Gather Data + Send Emails	Infusionsoft (included complimentary with Accelerator)	ActiveCampaign Ontraport Clio
Obtaining e-Signature on Engagement Agreement	DocuSign	Echosign HelloSign Clio
Accepting Payments Online	Quickbooks Online + Quickbooks Payments	Lawpay
Secure Document Storing + Sharing	Smartvault.com	Dropbox.com Box.com
Online Dynamic Task Management	Smartsheet.com	Google Sheets
SMS Reminders	Infusionsoft + Twilio + PlusThis (included complimentary with Accelerator)	Salesmessage.com
Real-Time Dashboard for Reporting/View of Campaign Results/ Intake of Clients	Infusionsoft (included complimentary with Accelerator) Clickfunnels (included complimentary with Accelerator) Google Analytics	

How To Take Next Steps and Get Virtual From Wherever You Are Starting Now.

We've Got the Support You Need to Take the Very Next Step to Get You to the Ultimate Outcome of "My Virtual Practice Adds Tremendous Value to My Community, and Supports + Wows My Clients." If You Commit to the Long-Term Vision and Take Just the Next Right Step, You Can Do It.

