

Checklist: Adapting Your Law Practice in Light of COVID-19

In the rapidly evolving environment of COVID-19, take practical steps to adapt your law practice, handle client matters, and continue to build and maintain relationships.

ADAPTING YOUR LAW FIRM PRACTICES AND WORKFLOWS

- Post an office/firm policy on COVID-19.
- Plan for staff absences.
- Ensure that colleagues and staff are well-informed about important matters to avoid disruption if attorneys or key staff members become ill.
- Consider business interruption insurance; review existing policies to determine if coverage is provided.

COMMUNICATING WITH CLIENTS

- Announce the steps your office is taking to promote the protection of the vulnerable population of clients, referral sources, and leads.
- Video conference with clients.
- Offer telephone seminars or video webinars.

IMPLEMENTING TECHNOLOGY

- Video conferencing: Utilize a virtual meeting solution; check for free time.
- Telephone: Consider using a Voice over Internet Protocol (VoIP) service which enables phone calls over the internet (and usually through an app on your phone).
- Consider switching from the desktop version of Wealth Docx® to the Wealth Docx® online.
- Leverage other online document solutions for real-time collaboration on text documents, slide presentations, and spreadsheets.
- Utilize case management systems.
- Use a daily email with a to-do list to help keep colleagues and staff on the same page.
- Beware of security issues:
 - Wifi security:** Never use free wifi for business or legal work. Instead, use your smartphone for providing wifi to your laptop when mobile.
 - Email:** Don't email secured data. Instead, give clients a secured link for transmission of documents.
 - Document storage:** Use secure document storage solutions for transferring sensitive documents.
 - Personal computers:** Avoid using personal computers for storing client documents. In the event of litigation, your personal laptop and data could be discoverable.
 - Verify the identity** of recipients before providing sensitive information.
 - Watch out for fake websites**, including false sites for the World Health Organization (WHO) and the Center for Disease Control and Prevention (CDC). If you click on links to fake websites, scammers can secretly install malware that steals information from your laptop.

GETTING PAID FOR WORK THAT'S ALREADY DONE

- Check your accounts receivable.
- Send invoices with letters.
- Follow-up with calls and remind clients that they can use credit cards or electronic transfer.
- Enforce collections, if you have to.

WORK IN PROGRESS

- What estate planning projects can you finish?
- What trust funding tasks can you complete?
- What trust administration/probate administration work can be accomplished?
- What matters can be handled that don't require in-person meetings?
 - Initial consultations:** Conduct them by phone or by video conference.
 - Document drafting:** Draft remotely.
 - Document review:** Consider your policy on draft reviews with clients.
 - Trust funding:** What tasks can you complete, and bill?
- Signing meetings: What steps is your law firm taking with scheduled in-person meetings? Consider whether these methods are viable and the potential risk
 - Witnesses and notary observe from six feet (or more) away from the signer.
 - Client signs documents and notary book, then departs.
 - All signers take the ink pens with them.
 - Use gloves and clean surfaces before and after the signing.
 - Wear masks, when appropriate and available.
- Document delivery:
 - Suspend in-person delivery; consider mailing documents.
 - Make sure to track document delivery and obtain signed receipts.

NEW WORK OPPORTUNITIES

- Focus on known, high-likelihood prospects.
 - Create A-B-C-D list for free consultations, such as:
 - Recent clients
 - Elderly past clients
 - Non-traditional families
 - Challenged families
- Estate planning: Confirm the content and location of documents.
 - Highlight medical directives and living wills for existing and new clients (call/email clients reminding them to have certain documents on-hand).
 - Offer to send digital copies of medical and health care documents.
 - Confirm that fiduciaries and others in "power positions" still make sense in older estate plans.
 - Offer codicils and restatements to update distribution structures in existing wills and trusts.
 - Offer trust funding services.

- Trust/estate administration: Trustees still have duties and obligations.
 - Consider “check-in” phone calls or video meetings with trustee clients.
 - Expedite ongoing trust and probate administration tasks.
 - Send a checklist to trustee clients with dates to remember.
- Business law clients: Advise small business owners on:
 - Employment policies
 - Reduction of schedule issues
 - Potential exposure of workers
 - Access to cheaper funds in light of interest rate reductions
 - Proposed federal legislation offering relief
 - Renegotiation of payment terms with suppliers and lenders, as well as extensions from landlords if they are having difficulty paying their rent on time

OUTREACH AND RELATIONSHIP NURTURING (Staying top-of-mind)

- Continue outreach to financial advisors, accountants, insurance agents, bankers, trust officers, and other professionals.
 - Make phone calls asking if there are any client matters with which they need assistance.
 - Offer their clients a free video or phone consultation to discuss the importance of estate planning or to answer estate planning questions.
 - Offer to guest-author a blog or co-host a webinar for their clients.
 - Consider crafting an “estate planning check-up or checklist” that the advisor could send to his or her clients (branded with your firm contact and an irresistible offer, i.e. a free consultation).
- Host virtual brown bag “lunch and learns” for financial advisors and other professional referral sources.
- Host an online “cafe” where you invite clients and colleagues to discuss a variety of topics, even those subjects not directly related to estate planning, finance, or the COVID-19 crisis.

WORK ON YOUR DIGITAL MARKETING (tackle practice development tasks you’ve been putting off)

- BLOG! This is a great time to catch up on (or start) your blog.
 - Consider your tone (avoid being alarmist, focus on education).
 - Consider adding a vlog as well (videos do not need to be high-quality!)
- Send newsletters.
 - With clients staying close to home for a while, they might be reading more.
 - Take advantage of this opportunity to create email distribution lists.
- Block your and others’ time for explicit client development activities.