
The Modern Lawyer's Guide to Running a Virtual Law Firm



Running a virtual law firm can be hugely beneficial. Working from a remote office can help you lower costs and overhead, earn you more flexibility to serve clients, specialize in niche legal offerings, and improve your work-life balance. But to run a successful virtual firm, you have to walk first—ensuring your practice is set up to handle a remote workload with integrated software solutions for client intake, marketing and lead generation, and contact and document management.

Explore what a virtual firm is, key differences between virtual and traditional firms, and learn how to run an efficient virtual law practice.



What Is a Virtual Law Firm?

A virtual law firm is a law practice that operates online without physical office space. Virtual firms are run remotely, with each team member collaborating and accessing documents from secure computers or mobile devices. This digital model allows virtual law firms to boost profitability and efficiency while positioning themselves for growth by cutting overhead costs.

A virtual law firm may serve clients anywhere its attorneys are licensed to practice, expanding the potential pool of clients and growth potential for these types of firms. Running a virtual firm with the help of legal software, client services can take place entirely or primarily online. For most virtual firms, a website becomes the digital home for the practice. Client communication can take place via email, text message, phone call, or in-person (if the attorney and client are in the same area).

Roughly 59% of law firms are already using web-based software, making the leap from traditional to virtual a natural step for those who want to reduce overhead costs while increasing flexibility in work arrangements.

State regulations and laws regarding virtual firms vary widely and see regular updates. While most states have provisions for virtual law firm operations, some still have Bona Fide Office rules in place that may prevent you from running a virtual law firm without meeting certain criteria. It's important to understand your state's regulations on virtual law firms if you plan on starting or transitioning to this type of practice.

Virtual vs. Traditional Law Firms:

Key Differences

Virtual and traditional firms may accomplish the same goals—providing quality legal services and representation for clients—but there are key differences in the way the two types of firms operate.



Virtual Firms

- Remote “office” run with integrated software solutions
- Limited overhead costs
- More flexibility for attorneys, staff, and clients
- Increased ability to offer niche legal services
- Potential for increased efficiency & growth

Virtual firms need no office space, which ranks as one of the highest overhead expenses for law firms ^[1]. This cost savings significantly cuts overhead and creates a more flexible arrangement for attorneys and clients. All documentation is digital, but in-person meetings can still take place. With lower overhead and more efficient operations, virtual firms have increased potential for growth.



Traditional Firms

- Physical office space to accommodate staff
- Higher overhead costs
- Limited flexibility in working arrangements
- May appear more legitimate or trustworthy to clients

Traditional firms can appear more professional or legitimate to clients than virtual firms, but this prestige comes at a higher cost with the need for office space large enough to accommodate all attorneys and staff. In-office meetings limit flexibility for both attorneys and clients, while higher overhead costs can inhibit growth and profitability.

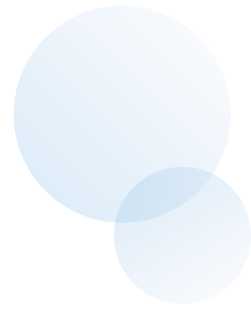


4 Keys to Running a Virtual Law Firm Successfully

With an array of benefits for practices of all sizes, making the choice to run a virtual firm can boost your growth potential and minimize costs. Running a virtual law practice successfully and efficiently requires four key solutions:

- 1. A dedicated legal CRM**
- 2. Online client intake**
- 3. Automated marketing**
- 4. Electronic documentation**

Each of these components is crucial to keeping a virtual practice organized while creating a winning experience for clients. Capturing and tracking leads with a legal CRM platform, handling client intake online, automating marketing tasks for fast follow-up, and relying on electronic documentation with the ability to send eSignature requests to clients can all help position your firm for success without stepping foot in a physical office.

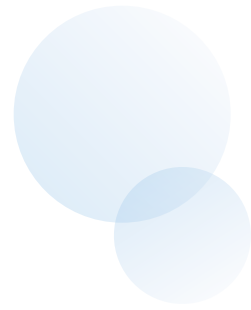


1. Use a Dedicated Legal CRM

-  Look for a legal CRM platform with industry-specific features
-  Capture, track, and organize leads

Customer relationship management (CRM) platforms form the basis of successful virtual firms, enabling you to effortlessly track, assess, and follow up with every lead and client. While there are thousands of CRMs on the market today, it's critical to use a dedicated legal CRM with robust, compliance-minded features designed just for law practices. This ensures you'll have the features and capabilities you need to run a virtual firm and helps you stay in compliance with better safeguards for client confidentiality and data security ^[2].

[Law Ruler](#) is a dedicated legal CRM that can help you manage every contact and client at your virtual firm. Powerful, built-in features make it easy to automate processes that drive the success of your practice, from intake to follow-up. Use Law Ruler to capture and track leads, increase client retention rates, and supercharge the growth of your virtual firm. With automated reports and a centralized dashboard to track the status of every lead, you'll never let leads or follow-ups fall through the cracks and can more efficiently manage your virtual firm.

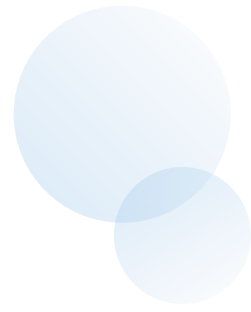


2. Streamline Online Client Intake

-  Use client intake software to create online intake forms
-  Streamline intake to quickly qualify prospective clients

The client intake process can make or break a virtual firm. To run a virtual practice, you need a streamlined intake process—and without paper files and forms, that means finding software solutions that help you efficiently manage intake online. Your clients will simply visit your website to fill out intake forms and questionnaires, saving you both time and hassle. But it's important to offer a smart intake form that helps you manage, assess, and qualify leads to keep intake efficient.

The Law Ruler legal CRM includes client intake software that automates and improves the process to ensure every lead is properly assessed and qualified without the need for long, unnecessary forms. Law Ruler's Intelligent Client Intake Form Builder helps you analyze prospective clients and their legal needs, automatically adapting the form questions based on client answers. The result is a shorter, more convenient intake experience for clients that quickly finds which cases are a good fit for your firm.

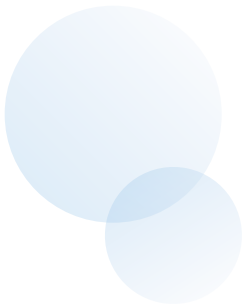


3. Automate Marketing Tasks

-  Use software to automate follow-up with leads and clients
-  Create email, text, and phone marketing campaigns

A virtual law firm needs a steady stream of leads and new cases. Automated marketing solutions can help your firm be consistent with outreach, follow-up, and client communication. Software that helps you automate key marketing tasks will help ensure valuable leads don't fall through the cracks with missed follow-up opportunities. To gain a competitive edge as a virtual firm and win more cases, you must consistently and promptly respond to every email, form submission, call, and text.

Master the art of follow-up and consistent marketing with automated emails, text messages, and voice calling campaigns on the Law Ruler CRM. Send automatic emails and texts to follow up with prospective clients in minutes, helping your firm stand out as responsive and client-focused. With a complete marketing dashboard, you'll be able to see the status of every contact and follow-up at a glance to keep your finger on the pulse of your practice.



4. Electronic Documentation Solutions

-  Assemble & store electronic documents on a secure platform
-  Use eSignature requests

Virtual firms run on electronic documentation, so ensuring you have a reliable solution for document assembly and eSignature collection is key. Assembling and drafting documents is time-consuming and prone to error, and collecting client signatures can create frustrating delays that halt case progress. Automation platforms can nip those issues in the bud and offer a streamlined solution for documentation.

The Law Ruler CRM platform features built-in document assembly and automation with one-click eSignature requests to keep your virtual law firm running efficiently. You can build professional document templates that auto-populate with client information to prevent errors that slow your progress. Trigger automatic document sends and one-click eSignature requests to collect the signatures you need in minutes, and securely store and manage every file for access when you need it.



Create a Path to Success with Your Virtual Firm

As more law firms transition to virtual operations and away from costly office space, the importance of knowing how to efficiently run your virtual practice will only increase. Without a physical office, your success hinges on how efficient the internal operations of your firm are.

A comprehensive, dedicated legal CRM like Law Ruler can help you create a path to success for your virtual firm with built-in solutions for contact management, client intake, marketing, and documentation. To see how the Law Ruler CRM platform can help you streamline your operations, run your virtual firm nimbly, and create a winning experience for clients, [schedule a free demo now](#).

Schedule a Demo

SOURCES

[1] <https://www.thomsonreuters.com/en-us/posts/legal/midsize-law-firms-expenses/>

[2] https://www.americanbar.org/groups/law_practice/resources/law-technology-today/2024/ensuring-security-protecting-your-law-firm-and-client-data/