

## Virtual Legal Assistant

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### ABSTRACT

A virtual legal assistant (VLA) is a skilled professional who provides remote assistance to legal practitioners and law firms. They provide remote administrative, technical, and legal support to lawyers or law firms, handling tasks like document management, scheduling, client communication, and legal research, freeing up attorneys for core legal work. VLAs are transforming the legal industry by bringing a new level of efficiency and expertise. With a rapid development of law firms, legal virtual assistants have been in much demand because they play a major role in analyzing significant legal documents, drafting various contracts and agreements for the company, handling different case laws, managing the paperwork of the firm, etc. This article examines how virtual legal assistants improve productivity and free up legal professionals to concentrate on what they do best.

**KEYWORDS:** *visual legal assistant, VLA, attorney assistant, virtual paralegals, law, legal industry*

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### INTRODUCTION

It takes hard work to run a law firm. It is not possible for the company to handle all the legal affairs by itself. Lawyers often experience workplace stress, which leads to a lack of work-life balance and poor management. They are often overwhelmed with the sheer amount of work involved with running a legal practice. They spend an average of 2.3 hours of their billable day on actual legal work. The rest is consumed by admin tasks that drain productivity and limit revenue potential. Having administrative support can make the difference between being ready for your next case and becoming overburdened. More and more law firms are choosing virtual legal assistants to handle these routine but essential tasks. Virtual legal assistants (VLAs) are responsible for handling repetitive but essential tasks, such as transcription, file management, legal research, email and call handling, and client scheduling. With a legal virtual assistant handling these tasks, your team can focus on what matters most. These knowledgeable individuals offer remote support, handling administrative duties, and offering invaluable assistance to legal practitioners as the world becomes more interconnected.

The digital age has revolutionized the workspace, and virtual legal assistants are becoming a crucial part of this change in the legal field. The emergence of legal virtual assistants in the legal industry represents a transformative shift in how legal practices operate. These experts provide specialized remote services and support, allowing lawyers to focus on core legal tasks and client needs. The responsibilities of a virtual assistant for attorneys extend to managing client calls, coordinating meetings, and overseeing contract management. Figure 1 shows a team of attorneys [1].

### WHAT IS A VISUAL LEGAL ASSISTANT?

The landscape of the legal industry is changing rapidly. The legal profession seeks new and innovative ways to streamline operations and provide the best possible client services. One increasingly popular option is hiring virtual assistants. A virtual legal assistant is a remote professional who provides legal and administrative support to law firms, handling tasks such as scheduling, correspondence, document preparation, and client management, without being physically present in the office. In addition to basic administrative duties, virtual

assistants for lawyers often take on roles that require legal research, document drafting, and case management.

Virtual legal assistants, also known as virtual paralegals, support lawyers by organizing legal documents, conducting research, and assisting during trials and hearings. The major difference between a virtual and in-house paralegal is that virtual paralegals work remotely. In-house paralegals could be full-time, part-time, or contract staff, while virtual paralegals mostly work on a freelance or contract basis [2]. They work from their own offices or homes, while in-house paralegals work within a law firm or legal department's physical office. VLAs work closely with attorneys to take care of some of the time-consuming administrative work that reduces lawyer efficiency and productivity. Figure 2 shows a typical virtual legal assistant [1].

Think of a virtual legal assistant as an extension of yourself for administrative tasks, allowing you to focus on lawyering and billable work. The primary responsibility of a legal assistant is to provide law and legal assistance to the team and support with administrative tasks like organizing documents and files, managing schedules, handling correspondence, conducting research, and drafting and proofreading legal documents. Virtual legal assistants typically have legal experience and are familiar with legal terminology, procedures, and documentation. Figure 3 presents must-have skills for a virtual legal assistant [3]. The minimum educational requirement for virtual legal assistants is a high school diploma or GED, though many hold bachelor's or master's degrees.

VLAs handle various administrative tasks such as calendar management, appointment scheduling, document organization, and correspondence drafting. They conduct in-depth legal research, compiling pertinent statutes, rules, and other legal resources. They can represent attorneys in client communications and act as a point of contact for clients [3]. A VLA can act as a communicator between the client and the law firm. It will provide the lawyer assistance in preparing for trials.

Here are some key ways a virtual legal assistant can support your practice [4]:

- Assisting with legal research
- Calendar management and scheduling
- Compiling reports and summaries
- Confirming meetings and setting appointments
- Email handling and outreach
- Handling client intake
- Keeping up with client communication
- Managing online files
- Updating documents and presentations

- Inbox management
- Onboarding new clients
- Liaison with intake specialists
- Systems creation
- Data analysis
- Naming electronic files and organizing them
- Sending out retainer agreements and retainer invoice
- Accounts receivable and payable
- Setting up new matters in case management software
- Uploading expenses into bookkeeping software
- Adding people to mailing lists

Figure 4 shows those who need legal virtual assistant [3], while Figure 5 shows a snapshot of the legal specialties VLAs can work with [5].

### USES OF VISUAL LEGAL ASSISTANT

A legal assistant completes necessary routine tasks on behalf of a lawyer. The job often includes elements of administration, customer service, and coordination. Lawyers or law firms hire virtual legal assistants to handle the repetitive but essential tasks of a law office, including transcription, file management, legal research, email and call handling, and the like. Tasks to outsource to legal virtual assistants include the following [6]:

- *Administrative Tasks:* Virtual legal assistants are remote professionals who provide essential administrative support to law firms without being physically present in the office. Virtual legal assistants support attorneys with various administrative tasks such as scheduling, correspondence, document preparation, making travel arrangements, coordinating meetings, and providing general administrative support. Virtual legal assistant services are used by law firms, whether that be for legal research, drafting documents, managing cases, or communicating with clients. A virtual legal assistant is not just an administrative helper. They play a crucial role in ensuring that legal operations run efficiently.
- *Sort Through Emails:* Chances are there are lots of unread emails. A VLA will go through your work emails and notify you of important correspondence. The virtual legal assistant will respond to client inquiries as they sort through the emails. Your virtual legal assistant crafts newsletters and emails to keep your clients informed and engaged, ensuring your messages stand out in crowded inboxes.
- *Respond to Inquiries:* First impressions count, especially when potential clients contact your firm. Your virtual assistant is your frontliner,

handling initial client inquiries professionally and efficiently. As a lawyer, you have clients to meet, witnesses to interview, and proceedings to attend. The virtual legal assistant will make sure you are aware of all the inquiries and how they were handled just so they will not be left in the dark.

- *Manage Your Calendar:* Calendar management typically means booking, rescheduling, and reminding clients of appointments. Calendaring requires precise attention to detail, keen listening skills, articulate communication about availability, expectations, and associated costs. It may also include light outreach to clients who are due in court to ensure they appear on time and are presentable. It will be your remote legal assistant's duty to manage your calendar and keep you on track. VLAs can handle all aspects of calendar management, including court dates, deadlines, and appointments, ensuring you never miss an important event. They will make sure you do not miss meetings, appointments, and important deadlines by reminding you of your schedule. Having an organized calendar will also help the VLA keep track of your activities so they can make changes if necessary.
- *Organize Files:* The virtual legal assistant is tasked with keeping all the files organized. Lawyers cannot afford to lose or misplace even one document. The files should be accessible from any device so you can take a look whenever and wherever you are.
- *Draft Contracts:* A contract is a set of promises that is legally binding. It ensures that the parties involved will stay true to what has been agreed upon. A contract can be a verbal agreement but this can easily be disputed. The virtual legal assistant will help draft contracts using the details you will provide.
- *Create Presentations:* Lawyers often rely on presentations to communicate their capability to prospective clients. Your chances of you representing them may depend on how clear and impressive your presentation is. The virtual legal assistant may assist you by creating PowerPoint presentations that convey your message with less text and more graphs, figures, and other visuals.
- *Assist in Pre-trial Preparations:* The virtual legal assistant will provide the lawyer assistance in preparing for trials. They will be tasked with writing reports, drafting contracts, and other legal documents necessary in a case. The VLA may also be asked to procure documents that will be used as evidence such as affidavits and formal

statements. A bilingual virtual assistant can streamline your law firm's operations, improve client communication, and help you reach new markets.

- *Conduct Research:* There is a bit of investigation involved in law practice. Much of the investigation will be done through thorough legal research. Proper research is vital to a case and while lawyers gain that skill from law school and during practice, they cannot find everything they need all at once. The virtual legal assistant can aid the lawyer by doing some of the necessary research. They conduct thorough legal research, summarizing findings to support your cases effectively, and give you clear summaries, so you can focus on analysis and strategy.
- *Legal Education:* In the field of legal education, a VLA can assist with curriculum management, student communication, and administrative tasks, ensuring smooth operations. Virtual assistants support online schooling systems and assist in research and recruitment, benefiting educational institutions.
- *Invoicing and Billing:* The virtual legal assistant may count billing and invoicing as one of their duties. The VLA can prepare the attorney invoice and send the billing documents to the clients after you have reviewed them.
- *Website Management:* Lawyers need to market themselves and their firms so people are aware of the services they are offering. A website is one tool that can help lawyers and small firms get noticed. The remote assistant will be responsible for maintaining the website. The virtual legal assistant needs to update the website regularly.
- *Customer Support:* Customer support for attorneys often takes the shape of providing case updates, answering and returning calls, replying to emails, monitoring social media, monitoring reviews and requesting them from clients, and triaging communications in general. Monitoring is an essential responsibility of firm owners placing legal virtual assistants in frontline service roles.

## BENEFITS

One of the main benefits of hiring legal virtual assistants is their ability to integrate smoothly into your team. Unlike traditional assistants tied to a specific location, legal virtual assistants can operate from anywhere. Virtual legal assistants remotely provide legal support and assistance to their clients. A virtual legal assistant can be an asset to a legal practice by offering flexible assistance, increased

productivity, and other valuable support, enabling attorneys to focus on core work. Other benefits of bringing a legal virtual assistant into your practice include the following [4,7]:

- *Working From Home:* This is typically one of the most commonly named advantages of being a virtual paralegal. When you work from home, you can spend more with your family and avoid the daily commute, dress code, and work schedules associated with working in an office.
- *Increased Productivity:* Virtual legal assistants can help your firm run smoother by handling administrative tasks. This frees up your in-house team to concentrate on the work that really matters. VLAs manage your calendar, emails, and documents, letting lawyers focus on legal matters.
- *Cost Savings:* One of the biggest advantages is cost savings. Hiring a virtual assistant can be significantly cheaper than employing full-time, in-house staff. You can save on expenses typically associated with full-time staff, which means more budget for client services. No need to pay for office space or supplies. Research shows that it can cost as low as \$17 per hour for a virtual assistant, while in-house alternatives may cost around \$25 per hour. VLAs typically work on a contract basis, which means law firms can save on overhead costs such as office space, equipment, and benefits.
- *Better Client Satisfaction:* Hiring a legal virtual assistant can lead to happier clients through improved communication and responsiveness. LVA's ensure clients receive timely updates on their cases.
- *Remote Efficiency:* The remote nature of their work offers flexibility and adaptability, aligning with various legal practice models and needs. This adaptability is particularly beneficial for legal practices looking to scale or adjust their operations quickly.
- *Flexibility:* Another great advantage of hiring legal virtual assistants is their flexibility. VLAs are trained to be flexible and adaptable to varying workloads, which can be particularly beneficial for smaller firms that lack the resources to hire full-time staff to manage fluctuating workloads. Their flexibility lets you quickly adapt to changes in the market. As your practice evolves, the flexibility of legal virtual assistants ensures you have the support you need when it matters most. Flexibility and adaptability allow virtual legal assistants to remain effective and productive, even in fast-paced and unpredictable environments.
- *Scalability:* Virtual assistants can scale services easily with business requirements. They can grow or shrink with business needs. They are ideal for startups and small businesses aiming to expand efficiently. As your practice grows or fluctuates, virtual assistants can easily be scaled up or down to fit your needs. You can adjust the number of assistants based on the current workload.
- *Embracing Technology:* Stay ahead with tech-savvy virtual legal assistants ready to implement innovative tools to streamline your operations. They can automate routine tasks, boosting efficiency, and reducing errors.
- *Gaining a Competitive Edge:* In a crowded legal market, leveraging virtual legal assistants can give your firm a leg up. Enhanced efficiency and top-notch service can help you stand out. With help of LVA's, your firm operates more efficiently, strengthens client relationships, and excels in a competitive landscape.
- *Collaboration:* Technological advancements can allow a virtual legal assistant to collaborate seamlessly with attorneys or other legal team members regardless of location, communicating and managing workflows through video conferencing tools, project management solutions, and document-sharing platforms. Collaborating effectively with VLAs requires clear communication and proper management.
- *Effective Communication:* Effective communication is essential to a successful collaboration with a formal legal assistant. Establish clear guidelines on preferred communication channels, response times, and project updates. Use email, instant messaging, and project management systems to communicate consistently and transparently. VLAs can handle client communications, ensuring that inquiries and concerns are addressed promptly. This leads to higher client satisfaction and loyalty. VLA provides effective communication as shown in Figure 6 [8].
- *Time Management:* Effective time management is a vital quality for the best virtual legal assistant, as illustrated in Figure 7 [8]. In a profession where deadlines are critical, being able to prioritize and manage time efficiently ensures that tasks are completed on schedule and to a high standard. With excellent time management skills, a virtual legal assistant can help law firms meet

deadlines, avoid delays, and maintain smooth operations.

Some of these benefits are shown in Figure 8 [3].

## CHALLENGES

Disadvantages of VLA include potential communication challenges, data security concerns, and the need for clear communication and expectations to ensure effective collaboration. Though legal assistants can take on many support and administrative tasks on behalf of a lawyer, legal assistants are limited in what they can do. Non-lawyer legal staff like legal assistants cannot under any circumstances practice law, give clients legal advice, or present themselves as lawyers. Supervising lawyers must make reasonable efforts to ensure non-lawyers that they employ conduct themselves in ways that align with the lawyer's professional obligations. Other challenges or disadvantages of VLA include the following [2,7,9]:

- *No Benefits:* As an independent virtual paralegal, you do not have health insurance, retirement, paid vacation, paid sick leave or other benefits that you may have if you work for an attorney. If you are a virtual paralegal employed by a law firm, you may have these benefits.
- *Increasing Competition:* Virtual paralegals are growing in numbers as individuals look to own their own business, spend more time with their family and be in more control of their career. While the opportunities for virtual paralegals are growing as attorneys seek to reduce overhead costs, the competition for those jobs are increasing as more paralegals choose to go "virtual" with their career.
- *Data Security:* The legal profession deals with highly sensitive and confidential information, and virtual assistants must be entrusted with this information. Remote work introduces potential security risks, including data breaches or unauthorized access, requiring robust security protocols and careful selection of virtual assistants. Sharing of sensitive legal information and documents gives rise to security concerns. Protect sensitive customer information and legal documents by implementing strong security measures. Your legal virtual assistant must sign a confidentiality agreement outlining their responsibility to protect client privacy and data. Regularly review and update your security measures to meet regulatory standards and protect sensitive information within your legal operations.

- *Regulations:* Specific codes, rules, and regulations for working with legal assistants may vary depending on your jurisdiction. It is important to check and abide by your state's rules and regulations for how lawyers may work with and what duties they can assign to legal assistants.
- *Communication Challenges:* Virtual assistants are not physically present in the office, which can lead to communication and coordination difficulties, impacting real-time problem-solving and collaboration. If the virtual assistant is in a different time zone, this can further complicate communication and lead to delays and disruptions.
- *Technical Challenges:* Virtual assistants rely heavily on technology, and technical issues like Internet outages or software problems can disrupt work and communication, affecting productivity. Ensuring that the virtual assistant's software and hardware are compatible with the law firm's systems can be a challenge.
- *Building Relationships:* Building a strong working relationship with a virtual assistant can be more challenging than with in-house staff, as personal connections and rapport may take longer to establish. Clear and effective communication and expectations are key to overcoming this challenge and ensuring a smooth workflow.

## CONCLUSION

The legal industry today is concerned about being efficient and accurate. Virtual assistants have become a game changer in the legal industry, helping lawyers improve their efficiency and accuracy. The role of a legal virtual assistant is dynamic and indispensable. Virtual legal assistants are leading the charge in the digital transformation of the legal industry, revolutionizing traditional business models through the implementation of artificial intelligence. They are reshaping the legal landscape by helping firms gain a competitive edge, streamline workflows, and offer more personalized services to their clients. They have been positively transforming the legal industry over the past few years, providing cost-effective, flexible, and efficient support to law firms of all sizes [10]. More information about virtual legal assistants can be found in the books in [1-14].

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Figure 1 A team of attorneys [1].



Figure 2 A typical virtual legal assistant [1].

### MUST-HAVE SKILLS FOR A VIRTUAL LEGAL ASSISTANT



Figure 3 Must-have skills for a virtual legal assistant [3].



Figure 4 Those who need legal virtual assistant [3].

<ul style="list-style-type: none"><li>• Corporate Law</li><li>• Criminal Law</li><li>• Family Law</li><li>• Personal Injury Law</li><li>• Estate Planning &amp; Probate Law</li><li>• Intellectual Property Law</li><li>• Real Estate Law</li></ul>	<ul style="list-style-type: none"><li>• Employment and Labor Law</li><li>• Immigration Law</li><li>• Bankruptcy Law</li><li>• Tax Law</li><li>• Environmental Law</li><li>• Healthcare Law</li></ul>
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**Figure 5** A snapshot of the legal specialties VLAs can work with [5].



**Figure 6** VLA provides effective communication [8].



**Figure 7** Effective time management is a vital quality for the best VLA [8].

## BENEFITS OF HIRING A VIRTUAL LEGAL ASSISTANT



Figure 8 Some benefits of a virtual legal assistant [3].

