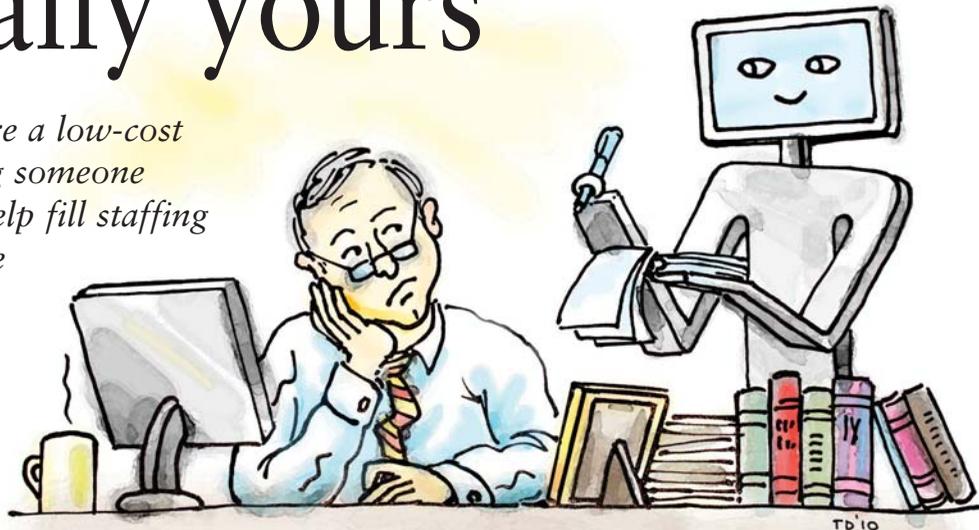


Virtually yours

Virtual assistants are a low-cost alternative to hiring someone full-time and can help fill staffing shortages. But there are drawbacks.

by James Careless



Jason Cherniak is a lawyer based in Richmond Hill, north of Toronto. When he began practising law in February 2008, money was tight. To save precious cash, Cherniak opted for a virtual office and virtual assistant. “I did all my work at home and online, and had my packages delivered to an executive suite complex where I could access a legal assistant on an as-needed basis, and rent the boardroom for meetings,” he says. “Starting out this way was one-fifth the expense

(www.vlotech.com). “All of my online communications with clients are encrypted,” Kimbro says. “All of my case and client files, and backend law office data, are hosted on a secure server, allowing me access wherever I may be.”

The virtues

Andrea Riccio is Managing Solicitor with the Kre8tive Law Group in Calgary. His firm combines a traditional real office with a virtual office at www.kre8tive.law.com. “Our virtual model is based on providing cheaper yet better service to our clients, while boosting our own profitability,” Riccio says. “The Web is perfect for people filing information on simple documents such as wills and estate plans, which are then reviewed by a full-time, fully-certified lawyer. Not having to have our people collect this information in person reduces our costs, providing savings that we can pass onto our online clients through set fees. Everybody wins.”

What about hiring a virtual assistant to handle legal paperwork? Such pay-as-you-go services are readily available, through firms such as The Satellite Secretary (www.thesatellitesecretary.com) and Executive Assistance Business Solutions Inc. (www.executive-assistance.ca). “We provide document preparation, transcription and billing for our clients over the Web,” says Marion McDonald. She owns and operates The Satellite Secretary from her home in Muskoka, Ont., serving lawyers across North America. “When you don’t want to pay a secretary to sit in an office for eight hours a day, we can provide what you need on a per-use basis.”

Virtual assistants are not hired by starting lawyers only. “We are often called in by established firms during

Shortcomings notwithstanding, virtual assistants and offices are becoming an accepted option for lawyers, and not just for those starting out.

of opening a ‘real’ office with a full-time assistant. It allowed me to build my practice by controlling my costs.”

Today, Cherniak has a bricks-and-mortar office, which he shares with

another lawyer. “I was getting too busy to work at home,” he explains. “Going in with another lawyer allowed me to split my personal life from my business life and increase my efficiency. Besides, I did become tired of arriving to meetings at my own ‘office’ after my clients. It just didn’t have the same cachet as a real legal office, either for them or me.”

Shortcomings notwithstanding, virtual assistants and offices are becoming an accepted option for lawyers, and not just for those starting out. Stephanie Kimbro, a lawyer in Wilmington, North Carolina, runs ‘Kimbro Legal Services’ entirely on the Web, using a secure Web-based legal platform provided by Virtual Law Office Technology LLC

busy periods,” says Elayne Whitfield, owner of Executive Assistance Business Solutions. “Our advantages include offering trained people as you need them, and being responsible for all the technology we need to do the job for you. We don’t take up a footprint in your office or on your physical inventory sheet. As well, once we’ve worked for you once, we get to know how you do things. Having access to a backup workforce who understands your legal operation can be a big stress-reliever.”

Get real

The many advantages of a virtual legal practice do not mean that traditional ‘real’ offices are on the way out. Even today, major clients prefer working with professionally staffed and equipped law firms, with all the costs this entails.

“There is no doubt that a physical office makes an impression on some people, that a virtual office does not,” says Jason Cherniak. “In particular, older clients like to see real people at actual desks. It makes them feel more secure in doing business with you.”

Real offices also make sense for lawyers who have lots going on, and require full-time staff/assistants to help them out. In the same vein, having the staff in the same physical space allows for face-to-face meetings, which can be important to effective management and avoiding costly miscommunications.

A balancing act

With his mix of real and virtual legal services, Riccio has struck a balance that aids clients and his Calgary firm’s bottom line. “There are some matters that can be dealt with on the Web, as long as they are overseen by qualified lawyers,” he explains. “There are also complex legal matters that demand in-person consultation and support from lawyers, that should never be delegated to an online Web form.”

In truth, there is room for real and virtual legal practices in today’s world. Meanwhile, for lawyers just starting out, virtual legal practices offer a cost-effective way to get started in a difficult economy. “I recommend the virtual route for those starting out,” says Cherniak. “It certainly worked for me.”

James Careless is a freelance writer based in Ottawa.



Getting best results from a forensic accountant

How to work with a team to get the best value from a fraud investigation.

By **Ken Froese**, CA*IFA, FCFI

It could be a vendor that’s been shipping counterfeit components to your client. Or, an employee who’s been “buying” services on its behalf — but the cheques are going to a dummy consulting firm set up by the employee. Perhaps the fraud involves collusion between an employee in accounting and one in sales.

Whatever the situation, you’ve been

asked to work with a team of forensic accountants. How can you get best value and results from them?

One of the most important steps is to work with the forensic accountants to determine, right at the start, the purpose of the investigation into money lost through fraud. Now that the horses have escaped from the barn, so to speak, do you want the accountants to help