



WSSFC 2024

Practice Management Track – Session 7

Getting Help: Virtual, Remote or Part-Time Staff

Presenters:

*Jody L. Cooper, Cooper Law Office, Milton
Ashley Quinto-Powell, My VA Rocks, Madison*

About the Presenters...

Jody L. Cooper is a graduate of UW-Whitewater with a Bachelor of Arts degree in Political Science and a minor in German. She graduated Magna Cum Laude from Marquette Law School in 1995. Since graduating from law school, Attorney Cooper has been involved in the private practice of law including real estate, bankruptcy, estate planning, probate, contracts, and family law. Jody continues to practice law in her solo office in Milton, where she works in a variety of practice areas in addition to providing consultations related to office management, legal technology, and data privacy. Attorney Cooper's teaching experience started at Blackhawk Technical College, where she ran the Legal Administrative Professional program for 12 years and received the Teacher of the Year award from her colleagues and students. She is currently a full-time faculty member in the Legal Studies/Paralegal Program at Madison College. Her teaching focuses on law office technology, e-Discovery, legal research, employment law, and contracts. Ms. Cooper is a DEIB Partner through the Institute for Equity & Transformational Change at Madison College.

Ashely Quinto Powell is a keynote speaker, facilitator, and subject matter expert on career, entrepreneurship, and motherhood. Her speaking style is funny, informative, and inspiring with lots of energy. She's well known for bringing humor to weighty topics and leaving audiences ready to take on the world. Recent appearances include TEDx, Chicago Ideas, Nokia, Pinterest, Google and the American Family DreamBank.

2024 Wisconsin Solo & Small Firm Conference Session: **Getting Help**

Presented by:
Jody L. Cooper + Ashley Quinto Powell

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Delegating is an act of self care!



LET ME INTRODUCE YOU TO THE MYVAROCKS 6 T'S OF DELEGATING!

- ⚡ Is it tiny?
- ⚡ Is it time consuming?
- ⚡ Is it tedious?
- ⚡ Is it terrible?
- ⚡ Is it teachable?
- ⚡ Is it time sensitive?

If you can answer yes to one of these, there is something you can delegate.

Examples of tasks you can start delegating

- ✓ Calendar/Scheduling Management
- ✓ Organizing/Managing Emails
- ✓ Sales Support/Outreach
- ✓ Personal Tasks
- ✓ Speaker/Podcast Outreach
- ✓ LinkedIn Outreach/Management
- ✓ Organize Google Drive/Sharepoint
- ✓ Project Management/Event Coordination
- ✓ Travel Booking and Planning
- ✓ Expense Management
- ✓ Data Entry
- ✓ Process Documentation
- ✓ Pre-week Planning
- ✓ Take Meeting Notes
- ✓ Create Meeting Agendas
- ✓ Create Powerpoint Presentations

SPECIAL TASKS UPON REQUEST

- ⚡ Newsletters
- ⚡ Editing/Proofing
- ⚡ Bookkeeping
- ⚡ Web Design Support
- ⚡ Copywriting
- ⚡ Grant Writing Assistance
- ⚡ Content Creation
- ⚡ Social Media Support

Contact your Onboarding Specialist for more information on how to add special tasks!



6 T's of Delegation Worksheet

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Adapted from the Harvard Business Review Article:
"How to Decide Which Tasks to Delegate" by Jenny Blake

Tiny

Not important or urgent but they interrupt you and add up to be intrusive and time consuming. Example: Registering for an event, including booking travel, adding to calendar etc.

⚡ _____
⚡ _____
⚡ _____
⚡ _____

Tedious

Straightforward tasks that can be handled by someone else. Tasks that are not the best use of your time. Example: Data entry tasks, color coding a spreadsheet

⚡ _____
⚡ _____
⚡ _____
⚡ _____

Time-consuming

Time consuming tasks that don't require YOU to do the initial 80% of research or initial steps. Example: Researching new software

⚡ _____
⚡ _____
⚡ _____
⚡ _____

Teachable

Complex tasks that can be systematized so you only need to check for quality and approve. Example: Ongoing monthly or quarterly tasks i.e. updating a repeating report

⚡ _____
⚡ _____
⚡ _____
⚡ _____

Terrible at

Tasks that not only do not fall into your strengths, but an area where you feel unequipped. Example: Your strength is accounting and you need a presentation designed or graphics made

⚡ _____
⚡ _____
⚡ _____
⚡ _____

Time-sensitive

Tasks that are time-sensitive but compete with other priorities; there isn't enough time to do them all. Example: Calling an airline to rush change seat assignments while you are in all-day meetings.

⚡ _____
⚡ _____
⚡ _____
⚡ _____



Rockin' Email Management

Tools, tips and tricks on working with your VA to manage your inbox

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1 DISCOVERY & GOAL SETTING

To start off, your VA will seek to understand your email workflow, including any areas of priority or stress. They'll help you document & identify inbox goals and guidelines before transitioning into clean-up mode.

2 CLEAN-UP & IMPLEMENTATION

In the clean-up phase, your VA will be working on initial inbox clean-up by filtering, decluttering, and organizing your emails. Systems will be implemented to help you move into maintenance mode.

3 MEETING & PROGRESS CHECK

In this phase, once you and your VA have set clear rules and expectations on how to manage the inbox, you will begin to refine processes to identify what's working, and what's not.

WHAT TO EXPECT DURING THIS PROCESS ⚡

Step 1

- Deep-dive into your workflow and pain points.
- Set inbox goals together.
- Identify how emails should be dealt with. E.g repetitive, junk emails, customer/client emails etc.
- Start a "who's who" list. You and your VA can identify and prioritize who is of greatest importance, and how they interact with you.

Step 2

- VA will begin "cleaning up" by organizing emails and filtering any "junk." Don't worry, they won't delete emails without consent.
- VA can create filtering and tagging systems to automate future emails and prevent clutter.
- VA will also start to identify and familiarize themselves with tasks that may be taken off your plate.

Step 3

- VAs thrive on feedback!
- VA will also have created an SOP to document the processes you have developed together to ensure continued success.
- Meet with your VA to identify what's working and what can be improved.
- Love the work your VA is doing? Consider delegating more tasks for even more benefits!

ROCKIN' INBOX GOALS



Inbox Rules and Expectations



80/20

Your VA handles 80% of email traffic. You handle the other 20% of prioritized email tasks.

INBOX 10

Between you and your VA, your inbox should have no more than ten pressing emails at a time.





DAILY

Your VA will check your inbox consistently to ensure your inbox is always under control.

24 HRS

Any emails your VA is responsible for will be addressed within one business day or less.

PRO TIPS

-  It may take some time to get your inbox to "maintenance mode." There are a number of influential factors, such as how many emails are stored in your inbox. Thank you in advance for your patience and understanding!
-  As your schedule allows, or if you want to take a break from screen time by taking a walk, use this time to jump on a call with your VA and sort through emails together!
-  If you consistently receive emails that require the same response every time or to which your VA would know the answer, feel free to lean on them to respond on your behalf!
-  A weekly meeting with your VA is vital to maintaining clear communication and a tidy inbox. Commit to a recurring time that works for you and your VA early on!

Contact Us!



Jody L. Cooper
Cooper Law Office
(608) 921-2311

[linkedin.com/company/
jcooper-law-office](https://www.linkedin.com/company/jcooper-law-office)

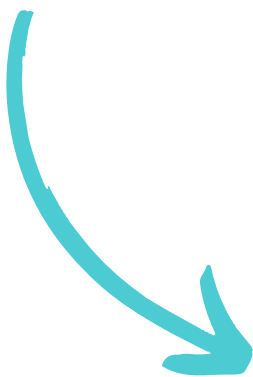


Ashley Quinto Powell
ashley@ashleyquintopowell.com

[ashleyquintopowell.com](https://www.ashleyquintopowell.com)

myva.rocks

Take the myVA Rocks Matchmaking Assessment





How to Use a Virtual Assistant

When you need one, how to onboard them, and how to delegate effectively

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Meet Jody L. Cooper!



- ⚡ Graduate of UW-Whitewater with a Bachelor of Arts degree in Political Science and a minor in German and graduated Magna Cum Laude from Marquette Law School.
- ⚡ Since graduating from law school, Attorney Cooper has been involved in the private practice of law including real estate, bankruptcy, estate planning, probate, contracts, and family law
- ⚡ Continues to practice law in her solo office in Milton where she also provides consultation related to office management, legal technology and data privacy
- ⚡ Currently a full-time faculty member in the Legal Studies/Paralegal Program at Madison College focusing on law office technology, e-Discovery, legal research, employment law, and contracts. Ms. Cooper is a DEI Lead Partner through the Institute for Equity & Transformational Change at Madison College.

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Hi! I'm Ashley Quinto Powell.

I do many things at once.



3

ROTARY INTERNATIONAL

ASHLEY QUINTO POWELL

EXECUTIVE Good

it All (t all)

POWELL

NAP TIME

STOCKS. ACADEMY

4



5



6



7



Today's Rockin' Agenda



Agenda

- ⚡ Common Mindset Pitfalls
- ⚡ Best Practices for Working with a VA
- ⚡ Get Confident in What and How to Delegate
- ⚡ Technology and Security



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How to Use a Virtual Assistant

Determining if you need a VA



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You're probably here because...

you feel ready for your first employee

but not quite

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You're probably here because...



you're overwhelmed and overworked

you're stuck doing things you don't like or aren't good at

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Common Mindset Obstacles

- 1. It's easier to do it myself**
- 2. It has to be perfect**
- 3. I don't have time to document processes and train**
- 4. My back office is a secret dumpster fire**
- 5. I'm too nice to give feedback**

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Law-Specific Considerations

1. Free up time for more billable activities
2. Contract Paralegals offer a dramatic cost savings
3. Increase the number of cases you can take
4. SCR 20:5.3 requires reasonable reassurance
5. SCR 20:5.4 prohibits fee splitting with assistants



How to Use a Virtual Assistant

Get confident in what and how to delegate

Think about this...

Energy Level

Tolerance for Risk

Skills Match

Learning Style

Domain Knowledge



bitly



Client Matchmaking Assessment

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The VA/Client relationship is a very special one, but in the beginning, it can be challenging to understand each other's workflows and preferences.

Below is a quick snapshot of your Client's personality and working style according to a self-assessment they performed in the matching process. Understanding what makes them tick and what support they may need ahead of time is a great way to set you and your Client up for success! Take a moment to read through their personality assessment and start thinking about how you might support your Client the best way possible!



Visionary Executive

The client is a high-achieving, high-performing individual with abundant energy. They require a VA who can match their pace and operate without being hindered by details or unnecessary inquiries. The client is at ease with a VA who can take their ideas and run with them, even if it means making occasional mistakes. Having carried an immense workload for a prolonged period, they seek someone capable of swooping in and relieving them of certain responsibilities. The client is in need of a break and some rest. Their ideal VA is assertive, proactive, and ready to propose areas where they can contribute. With their prior management experience, the client faces no difficulties in delegating tasks and providing feedback. A VA will assist them in enhancing productivity by serving as an accountability partner. It is essential for the client to communicate their objectives to both their VA and Onboarding Specialist, who will assist in establishing a healthy rhythm for tracking metrics.

Where am I a bottleneck?

What do I consistently neglect or forget?



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6 Ts of Delegation

1. **Tiny**
2. **Tedious**
3. **Time-consuming**
4. **Teachable**
5. **Terrible at**
6. **Time-sensitive**

From Jenny Blake's HBR article, How to Decide Which Tasks to Delegate

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The Impact Filter

STRATEGIC COUNCIL THE IMPACT FILTER™

1. PROJECT/FOCUS		3. SUCCESS CRITERIA	
PURPOSE	What do you want to accomplish? What is your motivation?		What specific results must be true for this project to be a success?
		1	
		2	
IMPORTANCE	What is the difference this will make? What impact will this have?	3	
		4	
		5	
IDEAL OUTCOME	What does the completed project look like? What is the payoff?	6	
		7	
		8	
2. SELLING YOURSELF			
BEST RESULT	What's possible if you do take action.		
WORST RESULT	What's at risk if you don't take action.		
Name: _____		Date: _____	

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Add a feedback loop



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What's in scope?

Family Calendar

Networking

Committee Work

Newsletters

Outreach



How to Use a Virtual Assistant

What can lawyers, in particular, delegate?



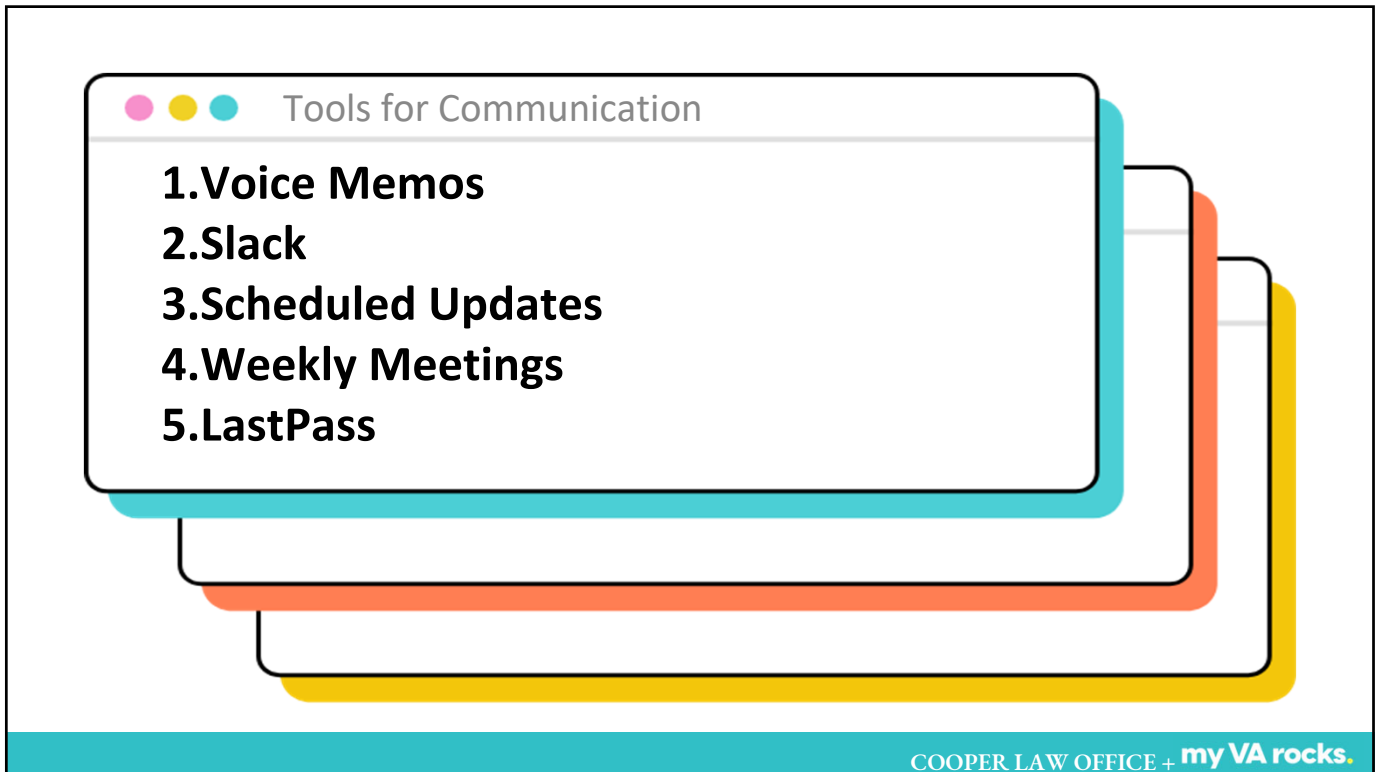
Hey! What about us?



Start low and slow
Expect 3 months of ramp-up

Common Places to Start

- 1. Calendar Management**
- 2. Email Management**
- 3. Social Media**



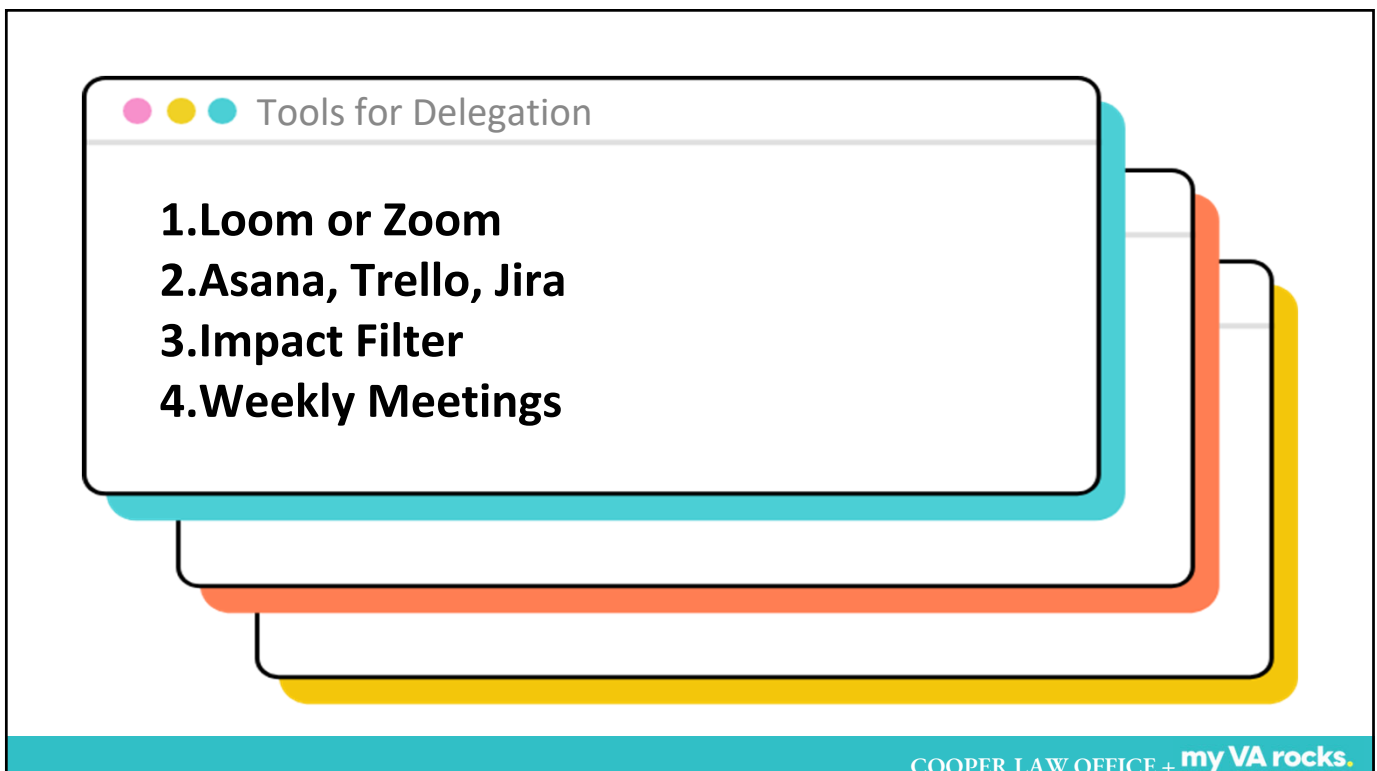
A slide titled "Tools for Communication" with a list of five items. The slide is styled as a stack of three overlapping cards in cyan, orange, and yellow. The text is in a bold, black, sans-serif font.

Tools for Communication

1. Voice Memos
2. Slack
3. Scheduled Updates
4. Weekly Meetings
5. LastPass

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A slide titled "Tools for Delegation" with a list of four items. The slide is styled as a stack of three overlapping cards in cyan, orange, and yellow. The text is in a bold, black, sans-serif font.

Tools for Delegation

1. Loom or Zoom
2. Asana, Trello, Jira
3. Impact Filter
4. Weekly Meetings

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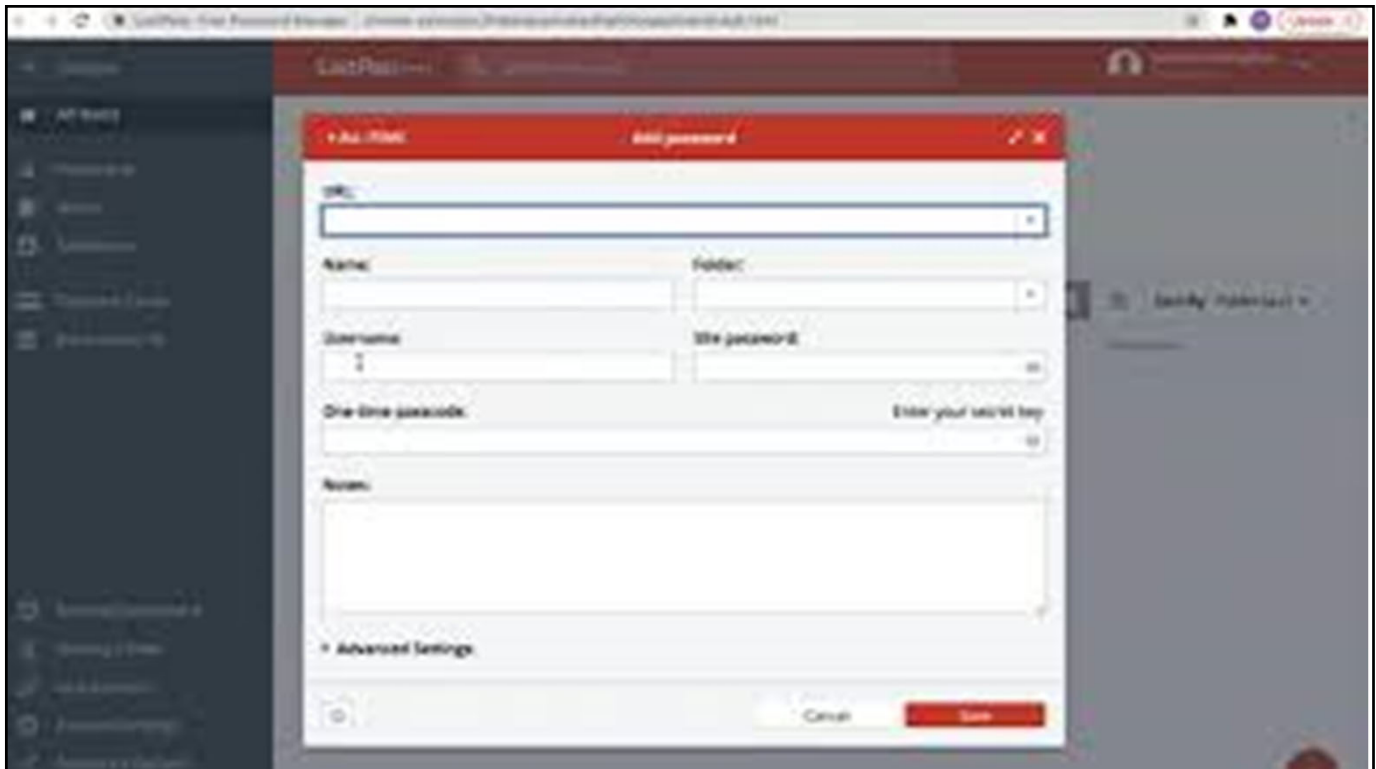
How to Use a Virtual Assistant

How to Delegate to Your VA



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How to Use a Virtual Assistant

How myVARocks makes finding and matching with a VA... rock



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OS Role & Responsibilities

What is an OS?

An Onboarding Specialist is a Customer Success Representative tasked with:

- ⚡ Helping to guide our clients through their onboarding
- ⚡ Learn how to effectively work with their VA
- ⚡ Build and maintain a strong Client relationship
- ⚡ Handle any Client concerns
- ⚡ Ensure a overall positive experience with myVA Rocks and their VA



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**YOU'RE
READY
TO
ROCK!**



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