

Virtual Paralegal Training Center™

# Virtual Paralegal

Newsletter Magazine™

## Meet VirtPara

What are your  
virtual  
paralegal  
questions?

## Ask VirtPara

Personal Injury

Virtual Paralegal

-- William Burley

VPTC Member Profile

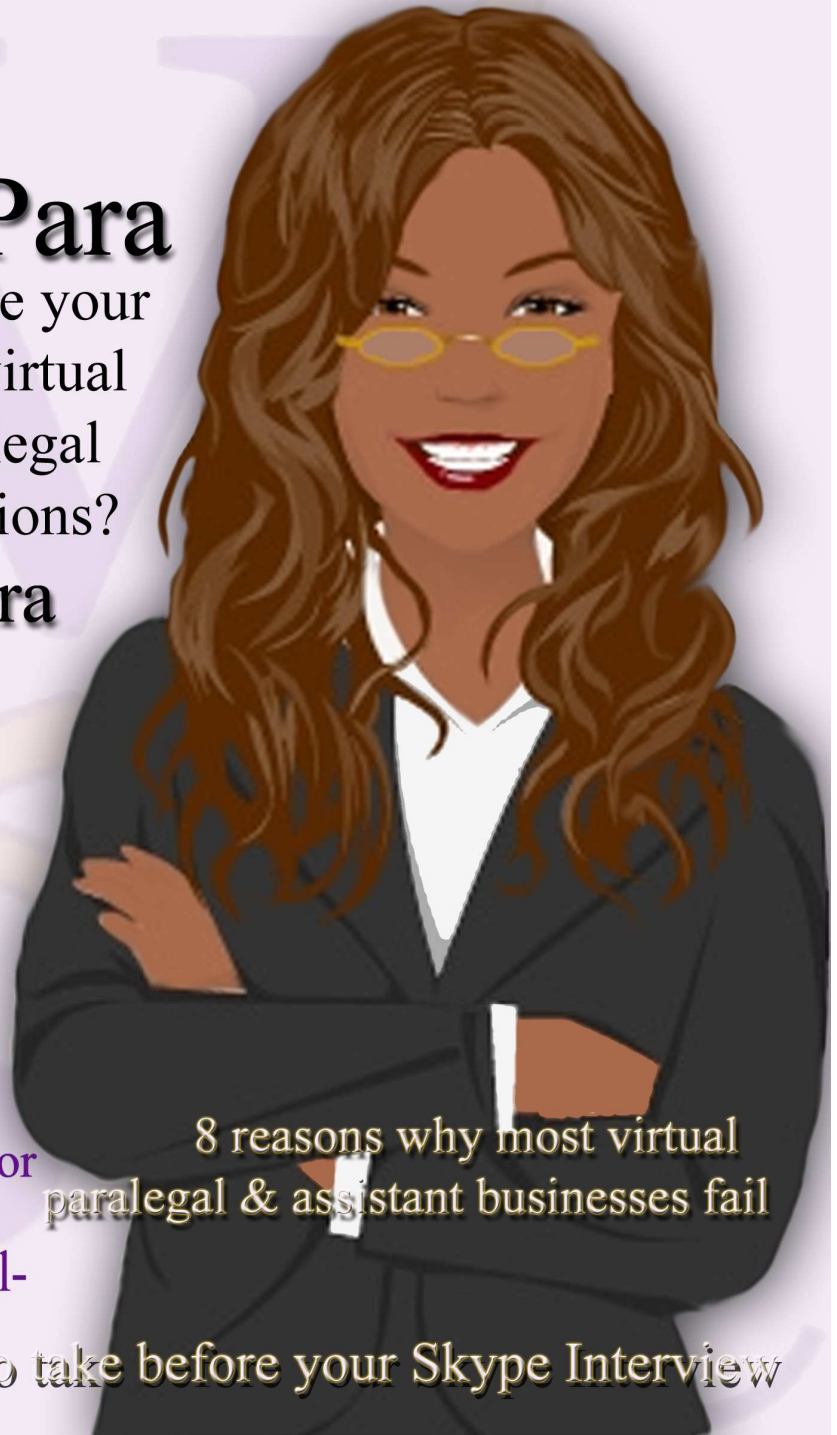
Gloria McCallum

-- Litigation Paralegal Contractor

Branding your virtual paralegal-  
assistant business?

Steps to take before your Skype Interview

8 reasons why most virtual  
paralegal & assistant businesses fail



## A Letter from our Editor

Hello and welcome to the Virtual Paralegal Training Center™. My name is Cordina Charvis and I am the President of this organization where our goal is to train paralegals and legal assistants on how to use their skills and experiences to become entrepreneurs.



*Cordina Charvis, Editor*

First, let me take a moment to say thank you to our members and subscribers for your continued support. It has given us the motivation to challenge ourselves to meet our promise to you which is to provide you with the best training and resources to help you start and grow your businesses.

We believe that the best way to accomplish this is to get our members and subscribers involved; after all you are our readers. In this issue you will notice that we have created several new columns and features that we hope will be of interest to you.

Our goal is to bring more exposure and recognition to the virtual paralegal-assistant business and to connect our members and subscribers with attorneys and small businesses who are interested in hiring and working with virtual paralegals and assistants.

I hope you will enjoy reading this issue as much as we enjoyed putting it together.

Please feel free to email us your suggestions and feedbacks on how to make the newsletter magazine better and most importantly, we need your contribution.

Thank you again for your support. If you need to reach me please email me at [inbox@cdcvop.com](mailto:inbox@cdcvop.com).

Sincerely,

Cordina Charvis

Editor at Large

## **In This Issue**

- Interview with a Virtual Paralegal – William Burley
- Branding your virtual paralegal-assistant business?
- Steps to take before your Skype interview
- Virtual Paralegal Profile – Gloria McCallum, Litigation Paralegal Contractor
- What type of software is necessary for your practice areas?
- 8 Reasons why most virtual paralegal-assistant businesses failed
- Virtual Paralegal Blog Posts
- Legal News: Freelancer Payment Protection Act
- Legal Elites Events: Annual National Notary Association Conference
- Today's quote
- Ask VirtPara
- Welcome to VPTC new members
- Virtual paralegal and assistant resources
- Virtual paralegal and assistant networking
- Connect with virtual paralegal clients
- Promotions
- Writers/bloggers wanted

## **Contributors:**

- William Burley, Managing Member – Burley-Wilson & Associates
- Gloria McCallum, Litigation Paralegal Contractor
- Freelancer Union
- National Notary Association
- Virtual Paralegal Training Center™

## Our Sponsors



**Evolution Parajuristes™**  
*The Evolution of Paralegal Services™*

For many years, Evolution Parajuristes™ ("EP") has been providing expert paralegal assistance with an experienced team of specialized paralegals that have held positions at top law firms and in-house legal departments for more than 10 years.

We are known in the legal community for our reliability, skills, experience and professionalism; most importantly, EP understands the importance of confidentiality in your business.

### **Follow us on Twitter - EvolutionPara**

[inbox@evolutionparajuristes.com](mailto:inbox@evolutionparajuristes.com)  
<http://www.evolutionparajuristes.com>

---

### **Virtual Paralegal Client Services™**

Virtual Paralegal Client Services™ ("VPCS") was created for attorneys and business owners who would like to learn more about the benefits and savings of working with virtual paralegals and assistants in their legal practice.

VPCS understands that our clients are looking for experienced, highly skilled virtual paralegals and assistants who are reliable, professional and most importantly they understand the importance of confidentiality in the legal business.



### **Post your Job Assignments**

If you are interested in listing a job opportunity with us, please [click here](#) or email us at [inbox@virtualparalegalclientservices.com](mailto:inbox@virtualparalegalclientservices.com) to complete our request form. We will post your listing on our job board and interested candidates will contact you directly.

<http://www.virtualparalegalclientservices.com>  
**Follow us on Twitter - VirtLawyer**

## **Interviewing your Virtual Paralegal** *featuring* **William Burley**

**Name:** William Burley

**Business Name:** Burley-Wilson & Associate's, L.L.C.

**Website:** [www.burley-wilson.com](http://www.burley-wilson.com)

**Practice Areas:** Personal Injury, Labor and Employment, Estate Planning, Family, Social Security Disability and Civil Litigation.

**Contact Information:**

(713) 551-8689 | [wburley@burley-wilson.com](mailto:wburley@burley-wilson.com)



**How long have you been a paralegal and how long have you been offering your services virtually?**

"I have been a paralegal for more than eleven years and have been offering those services virtually for approximately a year."

**How do you avoid unauthorized practice of law?**

"The unauthorized practice of law is a very serious topic here at Burley-Wilson. We avoid this by keeping an open line of communication between the company and our clients. We always get final approval from attorneys who hire us before filing anything with the courts or agencies."

**What type of software and equipment do your clients need in order to work with you?**

"Clients may either have Microsoft Office software products, WordPerfect, a fax machine or simply an e-mail address to work with Burley-Wilson."

**How do you handle confidentiality and conflict of interest?**

"Confidentiality and conflicts of interest are two other areas of great focus. First, each client is made aware if there is a potential conflicts concern. We will send a letter to the last known address to a former client that the conflict may affect. We await permission to begin work on the new matter. Confidentiality is taken very seriously at Burley-Wilson. Each client receives a Confidentiality Agreement that discusses our working relationship. Each virtual paralegal that contracts with us must sign a

Confidentiality Agreement and Privacy Policy Statement."

**How do you communicate with your clients?**

"Typically, we communicate with our clients in a variety of ways, including e-mail, telephone, regular mail or facsimile. E-mail has proven to be the most popular form of communication."

**What type of tasks should your clients delegate to you?**

"Clients may assign tasks such as drafting pleadings and discovery, client interviewing, scheduling of depositions and hearings, electronic file management maintenance work and any other job they would like to delegate that will allow them to actually practice law."

## Branding your virtual paralegal-assistant business

By Cordina A. Charvis

**B**randing is a form of creating a reputation for your business. It depends heavily on the way you operate your business as well as the way your clients view you as a business owner. Your branding should include the following:

**Mission Statement** – What is your commitment to your business? What should your clients expect from you?

**Vision Statement** – Where do you see your business in the next ten years? What will be your business legacy?

**Slogan** – Your slogan should describe your business in five words or less. It is like a jingle.

**Logo** – Your logo should help you stand out among your competitors. It is often used in place of your business' name.

**Work Quality** -The quality of your work is very important when branding your business. Your work product will speak louder than you when selling your services to your clients.



**Price** – The way you price your services will be a determining factor on who will use your services. If your prices are very low your business may be known as the cheap virtual paralegal-assistant, if your prices are too high you may be viewed as overpriced unless your services can justify your prices. Your business needs to find its right pricing model to be known more as a reasonable or fair priced virtual paralegal-assistant with the right skills and experiences.

**Customer Service** - Great customer service is essential for the success of any business. You have to find a way to make each client feel like they are your only client and not just a number or an afterthought.



**Confidentiality** – As virtual paralegal-assistants you must understand the importance of confidentiality in the legal business. Your clients will need to know what systems or methods you have in place to protect their clients' sensitive information.

**Reliability** – Without reliability, you do not have a business especially with the advancement of technology. Meeting deadlines and giving your clients frequent status reports must always be your priority.

**Professionalism** – Professionalism is the way you treat your clients. It is a combination of your customer service, your work product, how you handle confidentiality, reliability and the way you present your business to your clients and the public.

[What branding methods have you used to create a reputation for your virtual paralegal-assistant business?](#)

## Steps to take before your Skype interview

By Cordina A. Charvis

Skype interviews are similar to the traditional “in-office” interview with few exceptions and adjustments due to the advancement in technology. The rules of traditional interviews still apply including the following:

- **F**irst you need to make sure your Skype subscription is valid for the time the interview is scheduled.
- Read the instructions and ask the necessary questions on how to set up the software before the interview.
- Check all equipment such as camera and microphone to make sure they are working before the interview.
- Experts suggest that you have good lightening to eliminate shadows.
- Skype may ask you to set up a user name. You should create a professional user name for your business.
- Create a professional space to conduct the interview. You will need to designate a space where there are no distractions such as a poster of your favorite artist’s shirtless hanging on the wall behind you.



- If you have children and pets make the necessary arrangements for them to avoid interruptions.
- Cancel all professional and personal visits during the time of your interview.
- Dress professionally as you would for an interview in an office. Traditional conservative colors are highly recommended such as: black and navy. Remember you will be judged on your appearance.

[How do you prepare for your online interviews?](#)

- Before the interview begins, turn off all telephones that will not be in use for the interview.
- Have a pen, note pad and a copy of your resume with you for the interview.
- Have a list of questions for your client and be ready to explain your services and how you operate your business.
- Make note of the names of the people who are interviewing you and always address them by their names.
- Always be on time.

## Virtual Paralegal Profile

*Featuring*

### **Gloria McCallum**

**Name:** Gloria McCallum

**Practice areas:** Civil Litigation

**Business name:** [Totally Talented Paralegal Services](http://TotallyTalentedParalegalServices.com)

**Mobile:** 312-730-4515 | **Phone/Fax:** 888-501-7587

#### **1. Why did you decide to launch a virtual paralegal-assistant business?**

"I actually began my career as a paralegal after making a career change in 1993. My first paralegal job was as a contractor paralegal on a very large scale document production. At one point the project staffed over 150 contractors including attorneys, paralegal, and copy clerks. From that initial project I was able to effectively network with many of the paralegals and continued adding to my portfolio of assignments. I preferred having the control, variety of tasks, and challenging work environments that contracting allowed. Working as a paralegal in Dallas where I began my career there was never a shortage of firms and corporate legal departments that needed quality paralegal support. So I discovered early in my career that if I provided a quality service the project assignments would come and they did."

#### **2. How long did it take you to sign your first client?**

"My first paralegal project came while I was still pursuing my Associates Degree as a paralegal 1993. So for me it was immediate. To this day I continue to secure work assignments and projects through staffing agencies as well as market my services directly to attorneys."

#### **3. What type of software would you recommend for your practice areas?**

"I would for sure recommend the basics including word processing, multi-function copier/scanner, timekeeping, and invoicing software. Depending on your practice area you should then purchase additional software to fit your tasks' needs."

#### **4. How do you market your services?**

"I market my services through networking in the legal community, responding to classified ads, working with placement agencies and promoting my website:

<http://totallytalentedparalegalservices.tripod.com/>. I also use

LinkedIn.com which is by far one of the most powerful marketing and business development tools on the internet."

#### **5. What advice would you give to someone who is thinking about launching their own virtual paralegal-assistant business?**

## Virtual Paralegal Profile

*Featuring*

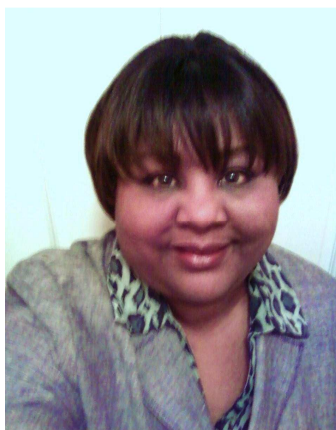
**Gloria McCallum**

*Biography*

“Today, due in great part to a shortage of hiring and layoffs at law firms around the country and at the same time schools are continually training and educating paralegals for a shrinking direct hire market, becoming a virtual paralegal is an alternative way to earning a living in this tough economy. However, to survive as a virtual paralegal you must set yourself apart from the rest of the pack by staying educated on the latest legal trends/technology, always providing a top quality service, building a solid network, generating referrals based on a strong reputation, and continually marketing your services.”

**6) Are you interested in hiring or partnering with another virtual paralegal or assistant? If so, how should they contact you for more information?**

Not at this time.



*Gloria McCallum, Civil Litigator*

**Gloria J. McCallum** is a Litigation Paralegal who has been employed as a contract paralegal for more than 15 years. Ms. McCallum has extensive knowledge of trial management and has assisted in both law firm and corporate law departments during the pre-litigation and litigation phases. Ms. McCallum’s areas of legal expertise focuses on civil litigation including large case matter management, document production management, document review, trial preparation and overall attorney support.

In her capacity as paralegal she has experience in drafting and filing pleadings; correspondence; scheduling, noticing, and summarizing depositions; client and witness interviews; preparation of discovery and responses to discovery; investigation; legal research; as well as detailed knowledge of the court system at both the state and federal levels.

Ms. McCallum obtained a BS Degree in Broadcast Television Production, with a minor in journalism, from the University of Nebraska. She obtained an AAS Degree in Paralegal Studies from Tarrant County College where she was awarded a spot on the Deans Lists for academic achievement. She has been a past member of the Dallas, Washington State, and Illinois Paralegal Associations.

## What type of software is necessary for your practice areas?

By Cordina A. Charvis

The type of software that is necessary in a virtual paralegal- assistant practice will depends heavily on their general practice areas. For example, I am a corporate virtual paralegal and in order for me to complete my assignments which are primarily legal entity management and company formations/dissolutions; I do not use any specific software, instead I rely on service companies such as CSC or CT Advantage.

However in general, most virtual paralegal-assistants use Microsoft Office, Adobe Acrobat and some form of billing and time keeping software to help them operate their businesses. Other business operating software may include task or project management software and conflict of interest database.



Experienced virtual paralegal-assistants often recommend that newbie's hold off on purchasing their practice areas software at least until they have a contract client. Most clients will give the virtual paralegal-assistant access to their practice areas software as well as research licenses such as Lexis and Westlaw.

[What type of software is necessary for your practice areas?](#)

### [Virtual Paralegal & Assistant Resources](#)

### [Virtual Paralegal and Assistant Tasks](#)

Please [click here](#) for a list of approved tasks by accredited paralegal associations that may

be delegated to paralegals and assistants under the supervision of an attorney.

### [Virtual Paralegal Client Blog](#)

The virtual paralegal client blog discuss questions and concerns attorneys may have about hiring and working with virtual paralegals and assistants. Topics may include but are not limited to confidentiality, software, fees, marketing, conflict of interests, and paralegal ethics among other things.

### [Virtual Paralegal Directory](#)

VPTC provides a virtual paralegal directory where attorneys and business owners may search free of charge to be connected with virtual paralegals and assistants from all practice areas throughout the world.

[Click here](#) to become a member of our virtual paralegal directory

[Click here](#) to browse our virtual paralegal directory

## 8 Reasons why most virtual paralegal-assistant businesses fail

By Cordina A. Charvis



- 1. Lack of experience;** it is highly recommended that you have worked as a paralegal for 3 or more years before launching a virtual paralegal-assistant business.
- 2. Not having written contracts and agreements.** Written contracts and agreements are necessary to protect you, your clients and your business.
- 3. Not pricing your products and services properly.** You should research the market to learn what others in your industry are charging for similar services. Then you need to take into consideration your expenses and break-even point when pricing your services.
- 4. Personal use of business funds.** It is highly recommended that you open a separate account for your business to help you keep track of your business expenditure and to let you know whether or not your business is on good financial ground.
- 5. Continuing to put money in an advertising method that hasn't worked for you.** If you are using a marketing method that has not generated any sales or clients; stop using it. You are only wasting your money.
- 6. Changing a marketing method that has proved to be working for you.** If a marketing method you are using is bringing in business do not change it; instead consider investing more in that method to help you increase your revenue.
- 7. Making it difficult for your clients to find you.** If your clients have to search for you they will find it easier to go to your competitors. Include all your contact information on your marketing materials including your website and email signature.
- 8. Not marketing at all.** If you do not market your business, how will anyone know about your services?

[Are you making any of the mistakes mentioned in your virtual paralegal-assistant business?](#)

**Today's Quote:** "We must reject the idea that every time a law's broken, society is guilty rather than the lawbreaker. It is time to restore the American precept that each individual is accountable for his actions." - **Ronald Reagan**



Image Courtesy of National Notary Association

## Legal Elites Events

### [Annual National Notary Association Conference](#)

The "Notary Event of the Year" offers educational and industry specific [workshops](#) and an interactive learning lab to build your skills, grow your business, manage your risk and protect your reputation; and provide you with the world's largest arena for Notary networking.



## Freelancer News

### [Freelancer Payment Protection Act](#)

Republicans and Democrats have finally found something they can agree on: freelancers should always get paid.

In New York State, Republican State Senator Martin Golden and Democratic State Speaker Sheldon Silver just introduced the [Freelancer Payment Protection Act](#).

Freelancers Union needs your help to get this bill passed. Please [contribute today](#) to make sure the bill becomes a law?

## Virtual Paralegal Networking Blog

- [Do you know the other virtual paralegal-assistants who work in your practice areas?](#)
- [What type of software is necessary for your practice areas?](#)
- [What surprised me the most about marketing my virtual paralegal-assistant business?](#)
- [What surprised you the most about working as a virtual paralegal-assistant?](#)
- [What are the benefits of starting a virtual paralegal-assistant business?](#)
- [How to use direct mailing to market your virtual paralegal-assistant business?](#)
- [Growing your virtual paralegal-assistant business](#)
- [Unauthorized Practice of Law \(UPL\) is the responsibility of the virtual paralegal and the attorney.](#)
- [Virtual paralegal-assistant job posting links](#)
- [The virtual paralegal-assistant accounting system](#)
- [8 Ways to create and develop your virtual paralegal-assistant business' niche](#)



www.mywebface.com

### Ask VirtPara

*Is it necessary to formerly incorporate your virtual paralegal-assistant business?*

Experts believe that if your company makes under \$100,000 you may consider a sole proprietorship, if it makes under \$200,000 a C corporation may be best to take advantage of the tax benefits and if your company brings in more than \$200,000 per year you should consider S Corporation or a limited liability company.

To learn the best business structure for your type of business; you should consult with a tax attorney or advisor.

*Do you have a question about the virtual paralegal-assistant business? [Email VirtPara](#) and let us discuss it.*

*Follow [VirtPara](#) on Twitter*



### VPTC New Members

A special welcome to VPTC's new members:

Karen Abron  
Karen Alridge  
Elisabeth Alvarez-Fager  
Joseph Brewster  
Donna Cruz  
Eric Duncan  
Elena Etienne  
Charlotte Glennie  
Frank Glover  
Gennady Gorelik  
Renee Hamlett  
Wanda Howell  
Regina Hudson  
David Kocher  
Tracey Kupferberg  
Joanne Mauriello  
Sabrina Moss  
Kimberly O'Quinn  
Jennifer Penrose  
Lori Powell  
Shonda Robinson  
Tina Thelen  
Marvin Travick  
Tiffany Tucker  
George Weinert  
Avis White

### Virtual Paralegal & Assistant Networking



- ✓ [Get listed](#) in our virtual paralegal directory
- ✓ [Subscribe](#) to our free online virtual paralegal newsletter magazine™
- ✓ [Subscribe](#) to our virtual paralegal networking blog
- ✓ [Join](#) the discussion on our virtual paralegal networking forum
- ✓ [Join](#) our Virtual Paralegal Training Center™ group on Linked In
- ✓ Follow us on Twitter – [VirtPara](#)
- ✓ [Like](#) the Virtual Paralegal Training Center™ on Face book
- ✓ [Get your copy](#) – virtual paralegal eBooks



[The Ultimate Virtual Paralegal Guide – eBook](#)

[Now only \\$8.99 – Click here for your copy](#)



**Writers/bloggers wanted**

The Virtual Paralegal Training Center™ is looking for volunteer contributors for our Virtual Paralegal Newsletter Magazine™ and blogs.

Contributions may come in the form of blog posts, articles, interviews, tips and resources relevant to the virtual paralegal-assistant business.

We aggressively advertise our newsletter magazine using several forms of marketing methods to make sure it gets in front of legal professionals including but not limited to attorneys, paralegals, legal managers, assistants and legal educators. [Read More](#)

### About - Virtual Paralegal Newsletter Magazine™

The virtual paralegal newsletter magazine™ is the industry leading information resource for virtual paralegals and assistants to stay current on the latest news, regulations, technology and new development in the virtual law practice.

<http://www.virtualparalegaltrainingcenter.com>


- [Free virtual paralegal directory](#)
- [Virtual paralegal survey](#)
- [Virtual paralegal-assistant e-Books](#)
- [Network with virtual paralegals and assistants](#)
- [Contact VPTC](#)




### Connect with Virtual Paralegal Clients

 [Subscribe](#) to our virtual paralegal client blog

 [Join](#) our Virtual Paralegal Client Services group on Linked In

 [Like](#) the Virtual Paralegal Client Services on Face book

 [Follow](#) virtual paralegal clients on Twitter – [VirtLawyer](#)



Virtual Paralegal Training Center™  
Virtual Paralegal Newsletter Magazine™  
<http://www.virtualparalegaltrainingcenter.com>  
[inbox@cdcvop.com](mailto:inbox@cdcvop.com)