

How to Work with Executive Assistants in the Digital Age - with Ron Payne

[00:00:00] All right, let's just be real. Are you a law firm owner that's scared to delegate? If so, you're far from alone. But this conversation is going to be super valuable for you because I've got my buddy, fellow law firm owner Ron Payne joining me today. And we're going to dive into everything that Ron has learned.

overcoming his fears and maybe lack of fears that he has that allowed him to shortcut all of these successes with getting his time back as a busy lawyer. Everybody, welcome back to the Passive Income Lawyer, where we help you build your law firm so that you can work less and [00:01:00] make more, which is like the ultimate dream, right?

Ron, thank you for being here today, man. Hey, glad to be here. Thanks for having me, man. Absolutely. When if you guys know Ron because I know a lot of people who probably see this know of Ron He's a kind of like a best buddy that you have if you're a lawyer in one of the programs that that he's in Everybody who knows Ron just kind of loves him but Ron when I had you on before we hit the recording button, I I asked you what you really wanted the message to be for the day because I know you've worked with, with team, you've worked with, with VAs, you've had help with delegating different things and you were like, I just want to talk to people who are scared to delegate because I see that so much in online communities and Facebook groups.

Can you share with us more about what you're seeing other lawyers talk about delegating and their fears?

Yeah. So again, thanks for having [00:02:00] me. And so our law firm is a midsize firm in North Carolina. We do family law and estate planning and You know, so much of what we do is client communication. And when I'm talking to other lawyers, they're asking things like, but what's going to happen to my data?

What about security? What about getting hacked? What about like, I don't have time to do all this. And my response to all of that would be, you really don't not have the time. Maybe I don't know if I said that backwards or not, but you don't have time to not delegate those things so that, you know, clients don't hire us to check our email.

They don't hire us to check our voicemail. Those are passive activities to get to the result that they want. What they want is their case taken care of, whether it's by you or an associate in the firm. They want to make sure that everything's on the up and up. They want to make sure they're communicated with.

Okay. But they want the work to get done. And they didn't hire us to be the receptionist or the email. They just, they're just trying to let us know stuff. [00:03:00] And if you can get that stuff off

your plate and let the fear of, but what if they steal something kind of get out of the way you'll pick up? I don't know.

I feel like I picked up two to four hours a day when I stopped checking my email accounts. So, you know, it's so, it's so true. I mean, we, we've both seen it, right? That when you start delegating these things and you get your time back, you realize how valuable that time is and, and how risky it can be to continue to take on those tasks when not doing them is so much better for the business.

And you, when you first started having these ideas to delegate, Did, did you have big fears that you had to overcome before you decided to have someone, for instance, help you with your inbox?

I think that the thing that kind of got me started, my only biggest fear was like, can I actually afford to do this?

[00:04:00] Uh, and I, you know, I think aside from, is my stuff going to get stolen? The other big fear is, is this going to cost more money? Um, so maybe if you're a brand new associate starting out, You know, maybe that's not your, your thing, but if you're the CEO of your company, a senior law firm, the, the cost of how much money I saved, um, by having that time back was, it was, it was ridiculous, you know, I, I was working mostly with an executive assistant in person, but you can do it virtually.

We wanted somebody physically in the office, but most of what they did, they could have done for me virtually and it freed up four hours a day. Well, if I'm billing it, my current billing rates, three, three 50. So if you're billing at 300 an hour and you get back two hours a day, even if you only produce one more hour worth of work, maybe the other half of that's not billable, it's still going to pay for itself, you know, cause that's five hours a week, 1, 500 a week, [00:05:00] 6, 000 a month.

Uh, you can have a, Amazing VA for less than 6, 000 a month. And if you paid 6, 000 a month for a VA and a hundred percent of all of that revenue, holy crap. So that was the biggest worry. And the moment I had all that time back, like. I don't know. It was like two weeks in and they had just started kind of checking my email and just not having to delete spam emails and crap emails from two of my three email accounts.

When we first started, I only started with two of the three accounts that I have. I had so much time on my hands. It was ridiculous. Didn't expect it to come so quickly. I thought, okay, it's gonna take more time. No, it was amazing. And it was more than two hours a day that I was saving by not having to handle the emails.

Cause it turns out half of your emails is the other half of what I wanted a VA to manage your calendar.

Yeah. Let's, let's talk about that. Cause I don't think a lot of people, when they think about having a VA manage their emails, [00:06:00] also can bleed into them managing the calendar. So how did that end up working for you seeing the them helping not just with the inbox, but also with the calendar,

man.

I feel like the bane of existence in email is this, Hey, are you free on Friday? Sure. What time on Friday? Well, I could do nine to 10, or I could do 12 to one, or I could do two to three. Okay. Well, I can't do 12 to one, which one's better for you. I don't know. Let's go with one o'clock. Okay, great. There's 17 emails that just happened.

None of which needed to happen necessarily with me. Not that I don't love talking to my friends, but the point of this is to have lunch with them, not to, you know, both of us lose an hour worth of work to go find an hour to meet. And so being able to one, to get rid of the seven emails that we just sent scheduling that and then also having it automatically show up automatically, you know, show up on my calendar, time blocked off to get to where I'm supposed to time blocked off for me to get back from lunch.

A [00:07:00] heads up on who I'm meeting with, where I'm meeting. I went into my meetings way more prepared because all of this information that I would have spent an hour prepping for to have in front of me just taking care of. So I didn't, I didn't really account for, I was thinking, well, I spend an hour or two a day checking my email.

That's that. But what you don't necessarily realize I didn't when I first got a VA or an EA was that. I was expecting to save time on the time I spent in my email folder, but there's also the like transition into your email transition out of your email, adding the thing from the email to the to do list, adding the thing from the email to the calendar, and then backfilling that with the data you need for the meeting that's taking place or cross referencing it to the, your CRM or your legal practice management system or your intake system or whatever.

You know, however you're tracking your, who you're meeting with and why you're meeting with them and then keying in the time for all of that. I didn't [00:08:00] do any of that. It just happened. And here I am thinking, oh, I'm going to save some email. That was the ice. That was the tip of the iceberg that sank the Titanic right there.

I

mean, when you talk about it, it seems like such a no brainer, but again, you and I see so many lawyers who are hesitant or worried or just straight out scared to delegate. And especially to delegate around their inbox. And I get the concerns there, but tell us more about what you see in terms of the actual risks in sharing your inbox with a VA.

Yeah, so a VA's lifeblood or an EA's lifeblood, if they want to grow in the profession, um, and if you're, if you're a lawyer, you're probably not hiring somebody who's never had a job before.

You're not hiring some high school kid. You're, you're probably going to vet them pretty well. And if you've done that.

I mean, what are they going to see in [00:09:00] my email? And now there are, look, there are practice areas, I'm sure where any little indiscretion of an email could cause a million dollar failure. And so for those positions, you're going to be working harder, but also you're making more money. So you're going to hire even a higher end, a more established EA.

So at the end of the day, I was like, I mean, what are they going to see? They're going to see, um, Via my delegation. So I delegate my email using the, we use Google workspace. So I delegated access, which means that the hair of a drop of a hair, bam, click cut off, you know? Um, and so I can easily give it and I can easily take it away.

What are they going to see in my email? 17 emails about, Hey, when's a good time for us to sit up for lunch? 3, 700 spam messages from every retailer known to the history of man on black Friday. Every major holiday, every major vendor corporation, anybody that I ever thought about maybe doing business with and [00:10:00] Facebook is going to email me soliciting me to do business around the holiday, their greatest sale.

That's what they're gonna get now. Of course, there are legitimate private things in my email. But at the end of the day, if they want to stay employed and they want to stay in the business, that is the one thing that I'm not worried about them screwing up. You know, you're, you're more likely to have somebody You know, I think the biggest risk to attorneys now I can't say this for everybody.

I can say this for a lawyer. Your biggest risk is wire fraud and check fraud. Those are your risks as an attorney. Somebody, you know, hacking into my two factor protected email, unlikely. Having a team member take my emails and forward them to the wrong party intentionally and maliciously, No, and the other part of that besides the fact that it's not likely to be a malicious thing is well How do you prevent the mistakes from happening?

That turned out to be pretty easy one [00:11:00] shout out to your course I know you you didn't ask me to say that i'm gonna say it anyways But joey your email course that we took with my ea and I together about Just setting up some systems in place was super helpful. And so what we did is we set up a label system and at first the labels were all kind of draft.

So they would flag an email. They intended to do just archive and they would put it in the to be archived label. They would take an email that says to be replied to draft a reply and then leave it in draft. So I could see the draft of their response. And then there would be other things that they said, you know, and so they would just flag everything and nothing got sent out for the first time.

Four weeks probably that I didn't personally review after a couple weeks. You're like, okay They they have a pretty good understanding of how to take care of my schedule when I want to calendar things They can respond to those Anything more substantive put it in drafts and let me look at it. Um, I would say after 90 days [00:12:00] 75 percent of the emails that I would

normally have previewed before being sent could have been sent without me or were sent without me, depending on who's the audience, who's, why is it being sent, what's the level of angst.

Right? You know, things like emails from judges, emails from attorneys. Those are responded to by me personally, always. But routine vendor emails, routine scheduling emails, routine client emails. Hey, just want to make sure you got the documents. Okay, thanks. You know, and so we, we built in this layered system where one, it wasn't a huge risk to start with, but then the first four weeks we started with a very, you know, I preview everything before it goes out the door.

Um, the upside of that was they got to, you know, Get practice Responding but no harm was done because I got a chance to do it reword it And then they could adopt my wording for the next time and sometimes they would send it as me Sometimes they'd send [00:13:00] it as them but after a few weeks then we stepped up to all right These emails don't need I don't even need to see them anymore.

I don't want to see them anymore Take care of it if you have any doubts at all Error on the side of letting me check it. Um, and we just kind of escalated and it went really well.

I, I love so much of this. And if I can just recap the two main things, themes that I'm hearing in terms of, of risks and your responses to them, there's one perceived risk with delegating your inbox of, can I really trust.

someone, especially an overseas VA to be careful with the confidential information that might be in my inbox and not to scam me. That's one thing, trusting around confidential information. And I loved your point there around, like, at the end of the day, what are they really going to do with that information?

And there, [00:14:00] there's bigger scam and confidential risks outside of Your email inbox. I loved your point too, about the, the, the reality of, of scam risks and stuff with like check fraud, wire fraud, stuff that can come more on the client side, usually than the team side. So that's, that's one risk that I, that I hope everybody can just take a breath on that.

The second risk, which I think does have more. Rationality behind it when we dig in is can I trust them to respond on my behalf that the, the work quality is going to be good. And I love your thought there too, of that's not the first thing they do when they get access to your inbox. And I appreciate the, the hat tip, uh, and the head nod to our course, because that is something that we go through in our delegation framework of we first want to [00:15:00] have the VA.

Manage and organize what's happening in the inbox, then drafting potential responses for the business owner to approve before they even start thinking about sending something on your behalf without approval.

Yeah. And if you even if you said, Well, I'm not even comfortable them sending out stuff on my behalf, then you could start with just simply organizing the emails that do require response,

handling the calendar requests back and forth and then just getting rid of all of the other stuff that maybe, you know, you don't need to respond to in your email.

Um, I know the last time I tracked it. I haven't looked at this metric in a long time now. Yay But the last time I checked it I was getting something on the order of 100 emails a day I would say that probably 70 to 80 of those Didn't require any intervention on my part other than to get them out of my inbox But you [00:16:00] know, you got to at least vet them and then send them out So if you spend only 30 seconds per email look at it review it You Kick it out.

Even if you find 10 seconds per email, that's still, you know, 20 minutes, 30 minutes a day that I'm saving right there, just out, out the door. And, and so we worked very intentionally to kind of up the comfort level with just getting rid of the things I needed. And we, we kept it very simple too. I think it's, there's a worry that you have to like over complicate this and you're going to need a 37 page manual to instruct somebody to check your email.

We had four labels. Um, E. A. Archive E. A. Draft response, Ron respond. And then I think like spam or there was like a fourth, like future reference, other cat, like an other category that we generally didn't keep stuff in [00:17:00] and we kept it really simple. And then, you know, it's, there's also, you know, if you're using Google workspace, I can't speak to the other platforms, but you know, with Google workspace, we had it, you can, allow them to respond on your behalf blind, like, secretly, where it appears to come from you, or you can allow them only to send it from them on your behalf, where it'll say, like, From Ron Payne, sent by Executive assistant here and you can choose that.

Um, I pretty quickly got to a level with my EA where For certain clients, they would send it from me from certain clients or certain folks. They would send it from them um, whether it was more important to appear to be coming from the Executive assistant or if it needed to appear directly from me and generally speaking, everything that came from me was something that I had personally vetted.

I just didn't have to type it up. You know, the other thing is sometimes you have to really think through what you need to [00:18:00] say. There's a lot of fluff in the email, right? Um, so I'm going to respond to this other lawyer. And I'm gonna say something like, Hey, thanks for your email. I got the documents. I have a set of questions and I need to.

Here's a few documents that I need to give to you, too. If you have any questions about this, let me know. Typing that out might take 3 to 5 minutes. Somebody else can type all that up. And then there's this one paragraph that's like substantive detail. Maybe it's a family law discovery, whatever. And I need to I need to weigh in on that one.

So type the whole email. Type one sentence that says, Ron, put your stuff here, you know, highlight it in brackets, and then I would go in, fill it in, make sure I was okay with the rest of the content. Everything's already been attached to the email. And I go, send, but I at least didn't have to type all that.

So it really did help to tear up both, you know, we were talking about security, but it really did help to tear up both, you know, we were talking about security, but it really did help to tear up both, you know, we were talking about security. [00:19:00] Concerns and so initially it's nothing goes without me seeing it.

And if they violated that rule, then they won't be there very long. Anyways, once they show that they've got a good grasp on draft weight send then we start working on drafting and sending without the weight for me on certain things. And then the other things are kept in the to do pile. Um, and we just set aside like 20, 30 minutes every day.

The first few weeks to go over. Um, here's what, here's the email, here's the proposed response. Why is this what I want or not what I want? And then from there you build up trust. And then, you know, then you can delegate

more of it. I, I love this idea of building up the trust and then delegating more because everything that we're talking about is great and a game changer.

And if you're smart and strategic about this, it can also just be the foundation of even [00:20:00] more freedom and this domino effect of what you're delegating. So as a, as an example, and this is just top of mind, cause I did this this morning, um, we had, uh, a client. Reply to to one of our messages during our client process, uh, and they sent us what we tend to get in this part of the client process where they're a little confused about what's happening.

They don't really understand the law here is a little bit backwards. And so as I was looking at the, what was that? I think, I think the law is backwards everywhere. Sorry. Right, right. And so as I was. As I was looking at the proposed response that the team looked, the team wrote up, I added a little bit and I was like, you know what, um, this is all looking really good.

And because I'm so out of the weeds that I can see that [00:21:00] I tend to get this type of a message quite a bit. that we're responding to. This is a great opportunity to create a blog poster on this specifically, so that we can more proactively when we send this news to the client, say, you can absolutely reply with whatever questions you have.

But we created this helpful article on our website that breaks down what's happening here. And it, it was as simple as me going to chat GPT and saying, Hey, Here's the situation. Here's what the client just asked us. Here's what we wrote back to them. Can you rewrite this into a longer form blog post? Dude, chat

GBT was a huge thing too, because I let my assistant use chat GBT for certain kinds of replies to build out a better framework for replying.

Um, but you know, that reminded me. So one of the things, because I was, you know, stepped back from checking the emails. I'm seeing what goes through, but [00:22:00] I'm seeing it kind of on a big data sense, like you're talking about. And so I noticed that our team was getting the same kinds of questions a lot that they were fielding on my behalf.

And that let me spend my time rather than being the guy trying to just respond, typing the same response 35 times to add a page to our website, request that our web developer add a blog post to our website, and then making a YouTube video to answer one of those questions. And all of that is time that I didn't have before I had an EA.

So now I've got clients that are fining me because I'm ask, answering the questions before they even ask them. And I didn't have to answer it the first 13 times because My assistant was answering them. You know, we're talking about this thing. I almost, it was a point I wanted to make. Sometimes people are so afraid to bite off, you know, hiring an EA.

And, um, so I've got two kids and they are my world. I love them. My little one is like a mini me as in when I was a [00:23:00] child, I was angry. He is angry. And eventually we got to a conversation where We talked about, do we want to put them on medication? Would that help? And I was like really scared about that.

And somebody said to me, you know, you don't, you're not doing it for life. If you try medication for two weeks and it doesn't work, stop taking the medicine. And I kind of had that same thought when I was hiring the EA was, you know, you're scared to try it. You're scared to delegate. You're scared that they might mess something up and hat tip.

we are already messing it up. Um, honestly, having some help will help you not mess it up. But if they do, let's say you hire an EA and they like just can't get it and they can't get the responses down. You're not married to the EA. You're not stuck with them for life. If you don't get the right, you know, VA or EA to start with, if you're using a vendor, you go back to the vendor and go, hey, this one doesn't get it.

Can I try somebody else? If you've [00:24:00] hired them directly, you know, you should teach them and coach them first. But let's just assume that it was some kind of catastrophic, can't be recovered from, fine. You let them go. You're not married to them for the next 60 years. If it's not working for you, then teach, modify, Change, terminate, whatever.

But like, they might get into my data, they might steal something, so therefore I'm going to work an extra 20 hours a week. When I kind of looked at it through the lens of, you don't have to take that medicine for the rest of your life if it's not working, I was like, oh my god, I didn't, why didn't I think of that?

And of course, I got really lucky. My, my first executive assistant was amazing and, or is amazing, I should say, and like, the only regret I have is I wish I would have, like, pulled the, the trigger on that hire six months earlier, if anything.

Yeah, well, and I hear that a lot of, man, I wish I would have done [00:25:00] this sooner now that I'm seeing what's possible.

If you, and I'm asking this again, so that. You can help as many people who are tuning into this. If you could put yourself back into the version of you that was procrastinating on this decision,

was resisting taking this next step, what, what was going on in your head at that point that was keeping you from taking action sooner?

I would, for me, it was, I was really legitimately just worried about budget. And can I, can I afford to hire somebody who isn't billing? Right. Cause that, that person per se, my EA had no billing responsibility, no anticipation that they would be billing. And so I was like, well, that's not a revenue producing position.

And, you know, and I was like, well, you know, I'll probably, Make more money if I let them [00:26:00] do that But what if I don't make enough or what if it costs more than it frees me up? Or what if I don't actually realize the increased? Benefit, um, especially as I was kind of transitioning between more legal work and less executive And I was, I was working on moving that transition to being more of an executive and less doing legal work.

And so if I'm giving up production of legal work to do more marketing, shaking hands, kissing babies, that kind of stuff to build my business. Um, but what I realized pretty quickly is man if I had done this like six months if I had done this a year sooner That is that many more marketing meetings. I could have attended that is that many more youtube videos I could have made I could have maybe ventured into tiktoks or facebook post or blog post or anything.

I wanted to do for my target market but I was I really couldn't get out of my own way on but like but can I afford this and I think in hindsight the answer is I couldn't I probably should have afforded it [00:27:00] sooner

Yeah,

I could I afford not to right exactly and it sounds cliché, but I mean it was real I freed up so much time to do actual marketing to do actual Lunch and learns to do actual one to ones with other attorney referral partners And I just didn't have the time for the meetings before because there was no way to do the work And to check the emails and do the shaking hands and kissing babies part.

And when I didn't have to do three hours of that a day or two hours of that a day, then all of a sudden that's an hour for, you know, I'm already taking lunch, but now I have a get there and get back time and somebody else to set up the time and set up the meetings and follow up on the. Conversations and

yeah,

man, I wish I'd have done it sooner.

And if, if we just look at the math of all of this too, it gets pretty crazy, pretty quickly. So let's just say that you're a law firm owner with a billable hourly rate of [00:28:00] 250. If you bring on a VA that you're paying 10 an hour, which is still on the high side for a VA, I get the concern of I'm paying this person 10 an hour, They're not revenue generating in and of themselves, but they are saving you money.

And if you think about it from your legal billable hour perspective, it's 30 or 25 of their hours compared to one of yours. And can you really. Two. Yeah. At most two hours, 500. If it was 40 hours a week, can you not go one more hour a week? Well, and to not take this even further, what you hinted at that I want to underscore is.

You were like, you know what? Like the legal work is one thing, but what about the marketing, the kissing, the babies, the, the getting on Tik TOK,

that is work that you can be doing that is actually more valuable than your billable hourly rate.

[00:29:00] And if we want to apply simple math to this, let's say your, your billable rate is 250 an hour. The work that you're doing to market and grow the firm. Could be 500 an hour. And now it's even more of a no brainer of what can I do to get these 10 an hour tasks off of my plate?

I

don't remember the name of the book, but there's the book that talks about, you know, the value of your hour. And it's like, you know, actual legal work to 50 an hour. But if you can do that marketing that brings in that 10, 000 client, then that was a 10, 000 hour. And so, and here's the thing. I mean, I, tell me if I'm wrong, right.

Cause my EA was in person and worth every penny. But aren't VAs even more accessible than 10 an hour? Especially if you, like, if you need somebody who truly is checking email and calendar, isn't. Is 10 standard now or what's the what is the what's the range?

Yeah, so what what we recommend and what we [00:30:00] do is we start off At six dollars an hour and we tell them that after 90 days it'll go up to eight dollars an hour

But so okay, so you get eight dollars an hour 40 hours a week is 320 bucks.

Like that's not even a client. That's like one client a month. Exactly. And, and that's, that's, if you're, I know a lot of lawyers out there don't always have, I didn't for the longest time, you know, average case revenue and all those KPIs that most law firms want to track. But if you're a law firm doing simple divorce, And in my area, they charge about a thousand dollars for a simple divorce.

I know some places it's more or less, but you know, an out the door price, that's one more divorce per month. And, and it's, you know, and you had. And, or you could work half as much and you still have leftover money. And this is,

this is why I love VA's because yeah, as a business owner, you should [00:31:00] be tracking your numbers.

You should know your KPIs. All that stuff is good. The reality is when you start hiring other attorneys, other stateside teammates, and you're dealing with more expensive teammates. You have to be more dialed in with your numbers to make sure that you're still getting a profit when you work with overseas VAs You can use that girl math of I don't know what it's gonna be But as

long as we get you know, one or two cases out of this, it's a landslide of profit And so yes, you should be tracking your numbers But you don't have to track them closely to see the value in the payoff when you're when you're looking at eight to ten dollar an hour delegation tasks

Well, and you know the other thing we were talking about security and comfort and all that stuff But the reality is like you and I are sitting here doing this on camera, you know people like well I need to see their face.

Okay. I'm sitting here looking at your [00:32:00] face. You're looking at mine I can read your body language If I interview you for an hour about checking my calendar and we have a conversation like this and your tone Your body language your confidence doesn't suggest to me that you can handle the task You You don't hire that one.

There are amazing VAs out there at amazing rates, both stateside and overseas, that you're worried about, like, will I be able to trust them? Will I be able, will they be able to handle it? You're going to get to talk to them and you're going to talk to them every day. Lord knows my poor VA spent way or my EA spends way too much time talking to me.

Like, I'm sorry for them. Right? Like, oh my gosh. But if anybody needs to get in front of me to Right them handling it. So I don't have to they need to speak to me

Yeah,

so i'm getting to have this face to face conversation so that I can not only have build confidence in what they're doing But maintain confidence that what [00:33:00] they're doing.

Also, it's not like I don't ever check my email So if I were to go into my email like they're like, oh god, what if they say something crazy? Well one I probably would have vetted it first, but let's say one slips through i'm in my email. I see something You Wrong went out. I can go. Oh, hey, fix or I can I'm always in my email Anyways, I'm just not in there as much so it's not like I can't catch it It's not like you're just you delegate it and you never check email the rest of your life.

What nirvana and utopia is that? It's just that I don't spend six hours a day or one. Okay, that's exaggeration I don't set up spending two to three hours a day checking email. I now spend i've got blocks of two Sorry, like two 30 minute blocks and that's when I check email and if it's not those two then the email is closed Because then I can get stuff that matters At ten thousand ten thousand dollars an hour or 250 done to grow my business

So good so good [00:34:00] you you mentioned this idea too of Like the the the real Work that needs to get done and I know that when we're in the work when we're in our emails, it all seems like real work, but a lot of it is is little stuff.

Something that you talked about when before we went live here was this idea of when there is a mistake. Usually, that's because I didn't train them well enough. And that's something that a lot of attorneys probably don't like to hear either because there's the sense of like, Oh, it's so hard to find good work that can not make stupid mistakes.

But what has been your experience with seeing those mistakes, correcting and how much of that has been an area of improvement for you and your systems versus a VA just not getting it with clear instructions?

First, I can say that there was a few, if [00:35:00] any, I don't, I can't think of, um, I've, I heard my EA back in December, January of 20, January of 23, let's say, um, started before then, but that's kind of the main timeframe, right?

And so I'm thinking back now, what, 18, almost 18 months, and I, nothing major crazy went out. Yeah. The door wrong. There were things that I fixed before it went out the door, but then that's a conversation at the end of the day, go, Hey, I saw your draft. I made some changes. Here's what it looks like now. Feel free to steal that in the future, or here's where you need to go to find the language to use for this certain thing.

Or I need you to put this into a letter for me. Can you draft a letter? Here's a go by, but like nothing went out the door that I didn't pre approve. And so what I, what I did learn was That sometimes I needed to be a little bit more clear [00:36:00] the biggest mistake That's not even the right word. The biggest lesson I probably learned is that I had to be better in giving my instructions.

If I wanted better results, just like our legal practice, management systems. If I put bad data into, we use Clio. So if I put bad data in Clio, and then you go to generate a letter using Clio's document generation or whatever, you're going to get a bad letter out. Like. If you don't key the address in and Clio's got all the stuff to key in the address on the letter, but there's no data there, then you get a bunch of commas where the address block should have been bad data in bad data out.

Well, if I give crappy instructions or worse, sometimes I didn't give any instruction said, Hey, I need a letter. And they took a stab at it because that's what I asked them to do. I said, just take a stab at it. I'm sure it'll be fine. And then I get it back and you're like, okay, that's not what I had in mind.

Well, I gave crappy instructions, but the cool thing about having an EA is, and this is something I didn't mentally [00:37:00] budget for in the time, but like when they learned something, when they came up with a thing, one of their assignments was right, we used to get guru. com as our like firm wiki, our firm repository of knowledge.

So whatever you're using, even if you're just using Google docs, right. And you have like a, a document for standard operating procedures, just have one document labeled. EA operating procedures or VA operating procedures and every time they figure something out for you Because they can't read your mind because the reality is that person will probably not be your VA forever Anyways, people move on they get other jobs You might mix up what you're doing and need to hire somebody else and it's not a bad thing It's just the nature of the beast.

Then you've got this built in repository of all this knowledge. Well, their job was to document it So even if something wasn't great the first time, one, it never went out the door anyways before

I saw it, and [00:38:00] two, once they learned it, it was into the, into our repository of knowledge for, here's how we do this, here's how Ron wants this done, and that's it.

The next person may not read your mind as quickly as the first one or, or faster than the first one, who knows, but it's in the dot, the knowledge base now. And so there's more go buys than there was for the first poor soul who took this job. And so you can just build the knowledge that way. And I didn't even think about that when I first hired.

Um,

I, I love that idea of centralizing their lessons learned, their processes, their SOPs. I don't know if, if, if you got to this point with your, your VAs, Ron, but one thing that we love building ourselves and helping other law firms get to is, Not just having a great rockstar VA that's helping with [00:39:00] something like their inbox But once that happens then shifting to coverage where there's not just one key person doing that But there's more than one So your rockstar email assistant can get sick go on vacation have a baby, whatever And it's not wrong going back into the weeds and managing the inbox.

And then

I did not get there yet, but man, it was, it was on the conversation because also a lot of my email was personal and I'm involved in scouting with my kids. And a lot of my scout emails are after hours emails. That's when that's when us parents get together about our kids stuff. Right. And I, I didn't get there yet.

Um, one day, one day, but having not only vacation coverage, because when my EA has been on vacation, oh, dear God, help me, right? Getting back and having to check my own email. Once you get out of it. You realize how much more time you have. And when you have to cover your own email on when they're on [00:40:00] vacation, it's the pits I've managed so far.

Um, but honestly, I'm more of a danger to myself than my EA or VA ever has been to me. Um, because I'm more likely to flag something and forget about it than I was the person whose job it was to keep that stuff maintained. But the other cool thing that I considered with that is not only is there a vacation coverage, Joey, but you could have our coverage, right?

So my, I'm on East coast time. And so. My primary coverage was 9 to 5, Monday through Thursday, and then 9 to 3 on Fridays, cause I'm not a monster and I don't work till five on Fridays. And then, but it would have been cool. And I hadn't got there yet, but one day, um, to have coverage like three to 10, nobody needs to email me between 10 AM, 10 PM and 8 AM.

Anyways, like you can email me, but it doesn't matter cause I'm sleeping. But having some coverage for that evening hour so that during [00:41:00] American waking hours, so to speak, Responses get handled. Emails get sent. Um, I was looking forward to that, but I'm not there yet. One day.

Well, it's, it's one of those things where even before you get to that level, you see how much freedom you get just by delegating it.

And then you're like, what's next. And then we talk about coverage and we explore those benefits. And then once you get there, you're like, okay, great. What's next. And you realize. I now have more freedom than I've ever had, especially around the email side of things. But if I could wave a magic wand, it kind of sucks that I'm still the one that's approving all these messages, that is supervising the rest, and how could I even delegate that role?

And then we shift from coverage to management, and having one of your rockstar VAs, you know, Go from covering this [00:42:00] this new growing team of EAs that are managing your inbox and doing other things And

one of the cool use cases that I had for my EA that really made a difference for me And it actually resulted in net positive business to my company as well is for scouting So i'm the cub master and I get a bajillion parent emails and it's data that I should be providing But i'm also Owning a law firm.

So I don't always have time to respond. And if I have to pick between being a law firm owner and responding to a Cub Scout email, one of those just has to come first and it's kind of obvious. That doesn't mean that the Cub Scout email is not important. But so when we register for fall camping trip, for spring camping trip, and for summer camp, those three events in particular, I'm very involved in because I'm taking 40 of my favorite little people and their moms and dads camping.

Some of whom have never done this before. And so our camping system has this, if you're, if when we're camping at like the district [00:43:00] level, there's this crazy registration system and it's, it's not intuitive. So they have to, the parent tells me they need to register for the camping trip. I log into the system and create an entry affiliated with my unit for the camping trip.

It generates a login, which then I, per, per the for this one camping trip registered to my unit that I then need to send to the parents so they can fill in all of the data about when they're arriving, dietary and medical preferences, and all those kinds of things for that you need. You got to go in and type in the names, generate the login, and send it to the parent.

It's, it's boilerplate Mind crushing and I'm a volunteer. I ain't got time for that But i'm doing that because that's the job of cub master But then I don't have time to do the fun things that cub masters want to do like plan fun pack meetings So the kids can laugh So I let my ea start helping me With just, you know, like once a week can the people that have registered [00:44:00] and send back out the registrations links that are because if you don't, if you just go to the website and kid and it didn't link it to the unit.

Okay. And so then they're like, they're like a straw in the wild and they're not, they're not assigned to my campsite. They're not assigned to my unit, right? It's a logistical nightmare. It drives the camp staff crazy, drives my parents crazy. Having my EA. Just grab those Google

form registrations from internal, get them signed up, which is just keying in name and email, and then sending that parent the link.

Here you go, log in, fill it out and pay there. I probably saved another three hours a week. My parents are like, Oh my God, Ron responds so quickly to his emails. Oh, yeah, Ron sure did. Yeah, buddy. And, and yeah, and then I got to spend more time planning fun PAC meetings. So then the parents are like, man, you've really stepped up your game as Cub Master lately.

What is it you do again? [00:45:00] Oh, I'm an estate planning attorney. Like, they're like, yeah, that's right. You run a law firm. How do you do all that? Uh, you know, it's crazy. And they're like, well, I've been meaning to get my will done. That's not why I did any of this, right? I'm just. I like hanging out with my kids and doing Cub Scouts.

Lo and behold, people are hiring me because they're like, man, if he can run his business like that. And guess what I want to be doing. I want to do estate planning. I want to do Cub Scouts. I do not want to send camping registration emails. Yeah. And it was just one, another one of those use cases where I didn't even talking about the extra coverage of having a second EA.

I didn't even realize. Having an EA just helped me like catch those emails. It was more of like a, Hey, could you log into this website and figure it out? And they figured it out and sent it back to me. And I was like, Oh my God, you just saved me like an hour and it's my volunteer thing. So now I get to do the fun parts of volunteering and okay, [00:46:00] the firm.

Is absorbing that cost of that hour or two, but I assure you that the seven hours of cub scouts that my staff helped me with probably brought in way more than seven hours worth of business and goodwill in the community and the higher quality of life for me as the owner, which that matters y'all. I didn't account for that the first,

there's such a benefits there from like, yes, it can help the firm, but we're also talking like personal email management, uh, which we haven't really dipped into in this call at all.

Uh, and if we, if we zoom way out again, I think the takeaway here is for any lawyers that are afraid of delegating, especially with emails, which. Tends to be a really good first place for a VA or a EA to help you with. I hope that this conversation has helped you put those fears to the side and, and have some more [00:47:00] confidence and peace of mind as you take next steps to get a VA to help you with this.

Ron, as as we close here, any final thoughts and words of wisdom? For law firm owners who are ready to take this next step.

Yeah, so I'll go back to my point about you're not married to this person. You can try it out. Hire somebody, you know, if you hire them out at 8 an hour as you were suggesting, Joey, and they Don't work out your okay.

Let's say they work eight weeks or eight eight day. Hold on two weeks That's 80 hours, right 40 hours a week times two weeks. I don't know 80 hours at eight bucks an hour is six hundred and

forty bucks If it didn't work out, you're not out. You sound like you bought a new Cadillac, hired a new attorney here, but if it does work out, man, oh man, the amount of time that I have saved.

And frankly, even if sometimes when [00:48:00] people don't work out, you learn some things about your own systems, your own processes, and then the next time you hire, that doesn't mean you give up, go, well, I tried it for two weeks. It didn't work. I'm done. It means you fix what you need to fix and you go back at it and try it again.

If you, if And if you own your own law firm, you're already not afraid of that. Because if you haven't broke it yet, you will, if you're just getting started on this journey, it's going to break, somebody is going to disappoint. You're going to have to let somebody go and it's okay. You're not married to them.

You let them go. You hire a better one. The next time using what you learned the first time. And when you finally realize that most people. You know, we're always so scared of the bad actor, but the reality is that most people just want to do good work and get paid fairly for it. And when you do, and when you get that person and you delegate and let go of the crap, you shouldn't be doing as a law firm owner.

Anyways, your life is going to change. My life is way better. I don't know if my EA will see this, right? But like if they [00:49:00] did, and I've told them this, my life is better because they've been my EA. I've spent more happy time with my family, more happy time with my law firm, more, you know, I'm present, I'm more engaged.

I'm hearing better. I'm listening better to clients because things like getting those notes into the system, getting those emails that need to get sent out or addressed or deleted or whatever done, you gotta do it. Your life will be better for it. Don't like, don't be, don't let the fear that they might possibly steal your grocery list out of your email stop you from taking the chance of getting back 8 to 10 to 20 hours a week.

So good, my man. Well, for everybody that has tuned into this, whether you're watching us on YouTube or Facebook or tuning into the podcast, I hope that you found this conversation helpful. I know I always walk away. Just feeling better after chatting with Ron. [00:50:00] Um, Ron, thank you for, for being open about everything that you learned when it comes to virtual assistants and EAs or executive assistants for anybody who wants to connect with Ron.

Ron, where are you hanging out these days on social?

I am mostly on Facebook, but you can also hit me up on the web. I'd say Facebook's probably the best place. I don't do a lot of, I'm only on Tik TOK to browse. So yeah, hit me

up on Facebook. Awesome. Well, thanks again for coming, Ron. That'll do it for today.

And everybody you heard run, take those delegation steps today. You deserve it for yourself. You deserve it for your business to get your time back and to get those 10 an hour tasks off of your plate.

