

# Lawyer Referral

The Lawyer Referral and Information Service Newsletter



Vol. 10 No. 2

Summer 2017

## Lawyer Referral's New Technology Partner: Legal.io

By **Tony K. Lai**

- What do better referrals look like to you?
- What would it take to bring you better referrals to help you grow your perfect practice?

At Legal.io, we're proud to be working with NYSBA as the technical partner on a range of programs designed to bring you better referrals, at every stage of your career. We are a team of lawyers, engineers, designers, and community support specialists headquartered in Silicon Valley and distributed across three U.S. states. Against a backdrop of transformation and change in the industry, we started Legal.io as a way for attorneys to connect with rewarding and valuable opportunities through trusted networks.

Since February, of this year, we have been powering the technology back-end of the NYSBA LRIS program, supporting the speedy delivery of nearly 500 matched referrals, triaged from requests coming in from across New York State, as well as 18 other states or countries. Our mission is simple – to make the online process of accepting referrals and submitting outcome reports simple and efficient. Some of you may have received a



notification about a potential match and noticed how quick and easy it is now to accept or decline them. Doing so will help to train the NYSBA system to send you better referrals. It also helps to get clients to an available panel member much faster. We've sought to make consultation and engagement outcome reports quick and simple for you to complete as well – in real-time, not 3 months after

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the fact. When you accept and complete an engagement, this adds data points, like 'dots', on the legal referral map. Working closely with the team at NYSBA, we're seeking to connect

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## Q&A

In an effort to assist you and your staff with some common inquiries below are answers to frequently asked questions.

### **What is the LRIS membership fee?**

LRIS panel members pay an annual fee of \$75 (\$125 for non-NYSBA members).

### **What is the referral fee if a client retains my services?**

LRIS panel members agree to remit 10% of their entire fee if the fee is \$500 or more.

### **Do I need to carry malpractice insurance?**

Yes, LRIS panel members are required to provide proof of malpractice insurance in the minimum amount of \$100,000.

### **How much should I be charging for the initial ½ hour consultation?**

The consultation fee is \$35.

### **What if I can't help a client that was referred to me?**

If you decline a referral for any reason, you should refer the client back to the LRIS. A LRIS client can also be seen by another attorney in your firm but the referral will be tracked as a referral to you.

### **How do I sign up?**

Download the LRIS application at [www.nysba.org/joinlr](http://www.nysba.org/joinlr) or call 1.800.342.3661 or email [lr@nysba.org](mailto:lr@nysba.org) to have an application mailed to you.

\* Go to [www.nysba.org/joinlr](http://www.nysba.org/joinlr) for a complete list of service counties.

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the dots between the great work that you're doing and the flow of new clients to your door.

Having an up-to-date profile, complete with helpful articles on your areas of practice or how you've guided clients through a particular legal matter, will also help with attracting and converting better referrals. Included within this newsletter you will find links to helpful posts that can help you get set up with this and much more.

Going forward, when you login to your account, expect to have access not only to your referrals from the NYSBA LRIS program: Other programs currently underway with NYSBA will help you plug into rewarding pro bono opportunities and exchange referrals in other ways.

Beyond NYSBA, by distributing with a decentralized legal referral in-

frastructure, we are designing technology to enable the dots to be connected between a diversity of programs run by organizations across the broader legal service ecosystem, from bar associations to law firms to Fortune 500 companies.

Returning then to the questions above, if you're interested in learning more, be sure to login every now and then to explore. Over the coming weeks and months, we hope to meet many of you, online and in person. Feel free to reach out anytime through the chat button on your attorney dashboard if you've any questions or feedback, or contact me directly at: [tony@legal.io](mailto:tony@legal.io)

Looking forward to connecting!

*Tony K. Lai, MA (Oxon), LL.M. is Co-founder and CEO, Legal.io*

## TELL US HOW WE ARE DOING

We want to be responsive to your practice and your needs. LRIS lawyers have a good perspective on the effectiveness of the program, and we value your suggestions, complaints and kudos. Send your feedback to [evalentin@nysba.org](mailto:evalentin@nysba.org)

## Percentage Fee Reminder

LRIS collects 10% of the entire fee for any referral case fee that is \$500 or more. For example, our percentage for a legal fee of \$1,000 would be \$100. Some attorneys have mistakenly subtracted the first \$500 and submitted only \$50.

**Any questions** about percentage fees can be directed to Eva Valentin-Espinal, Lawyer Referral Manager at [evalentin@nysba.org](mailto:evalentin@nysba.org).

# LRIS Stats Partnered with Legal.io Technology

## Same-Month Reporting

Goodbye time-intensive, patchy, quarterly reporting. In the first 3-months, NYSBA LRIS increased same-month attorney disposition reporting by 50.8%.



## Valid In-Bound Requests

# +16.3%

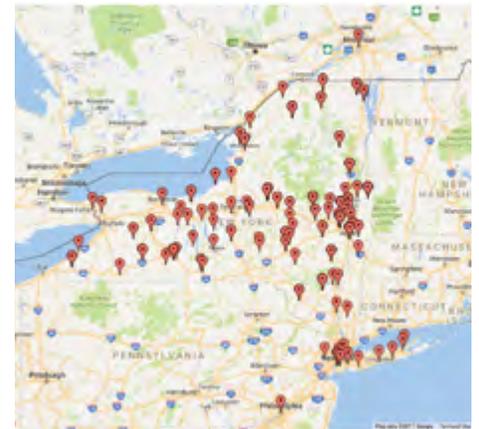
During the first months of the NYSBA LRIS' use of the Legal.io platform, SEO best practices and smart workflow support increased throughput from intake to outcome by 16.3%.

**12%-15% of consultations turn into engagements, the industry average**  
(ABA average is 3%-8%)

## Expanded Reach

Representing 18+ Jurisdictions

During the first 3-months, the NYSBA LRIS implementation received Client Requests from 18+ different international and domestic jurisdictions, including the UK, Canada, Morocco, and Ghana. These were clients seeking legal services in the state of New York.



## Legal.io Best Practices

1. Please respond (accept or decline) to email referrals within 48 hours.
2. Proactively follow-up with clients to schedule a consultations as soon as possible after getting the introduction email. This will increase your chance of getting retained.
3. If you are going on vacation make your profile disabled to prevent referrals emails from filling up your inbox.

# NYS Lawyer Referral Staff Come Together

On May 19th, the first NYS Lawyer Referral Summit was held in Albany at the State Bar Center. The Summit was designed to provide training to local bar lawyer referral staff that cannot afford to regularly attend the ABA's annual Lawyer Referral Workshop.

Attendees came from Albany, Brooklyn, Manhattan, Syracuse, Westchester, and New Hampshire.



Rosanne Hiebert (Brooklyn Bar), Eva Valentin-Espinal, (NSYBA), George Wolff (NYC Bar) and Sheila Vermacy (NH).



LRIS Chair Elena Jaffe Tastensen warms up the crowd at the NYS Lawyer Referral Summit.

# NYS Lawyer Referral Summit Program Highlights

## LRIS Nuts & Bolts

### Roseann Hiebert

Director, Lawyer Referral Services  
Brooklyn County Bar Association

## LRIS Issues in NYS

### George Wolff

Executive Director  
New York City Bar Legal Referral Service



## What's Trending in LRIS?

*Highlights from the ABA National Lawyer Referral Workshop  
Panel Discussion*

## NYS LRIS Community and Collaboration

*How can we help each other, the public, our lawyers, collectively?  
What initiatives can we undertake together?*

## Legal.io Demo

### Tony Lai

Co-Founder and CEO of Legal.io



# State Bar Launches Immigration Pro Bono Portal

By Kristen Wagner

With funding from The New York Bar Foundation and the New York State Bar Association, and under the guidance of NYSBA's Committee on Immigration Representation, the Pro Bono Services Department created an online immigration pro bono portal to better connect volunteer attorneys with legal service organizations that serve New York's immigrant communities

The New York State Bar Association's Immigration Pro Bono Portal, through technological innovation developed by Legal.io, addresses the problem of referring attorney volunteers to organizations providing immigration legal services throughout New York State. Due to recent Executive Orders and increased enforcement efforts and presence, there is an overall climate of uncertainty for immigrants in the United States, be they here legally or not. This uncertainty has resulted in an increased need for legal services for this already underserved community, burdening the legal service providers whose resources are stretched thin as it is. Concurrently, there is a rising tide of attorneys who wish to help this vulnerable population. These attorneys may or may not have immigration

legal expertise. NYSBA's portal seeks to refer these volunteer attorneys to legal service providers that serve immigrant communities in an efficient and seamless manner, helping attorneys volunteer in a meaningful way while meeting legal service providers' needs rather than straining their resources, and ultimately providing immigrant clients with effective counsel.

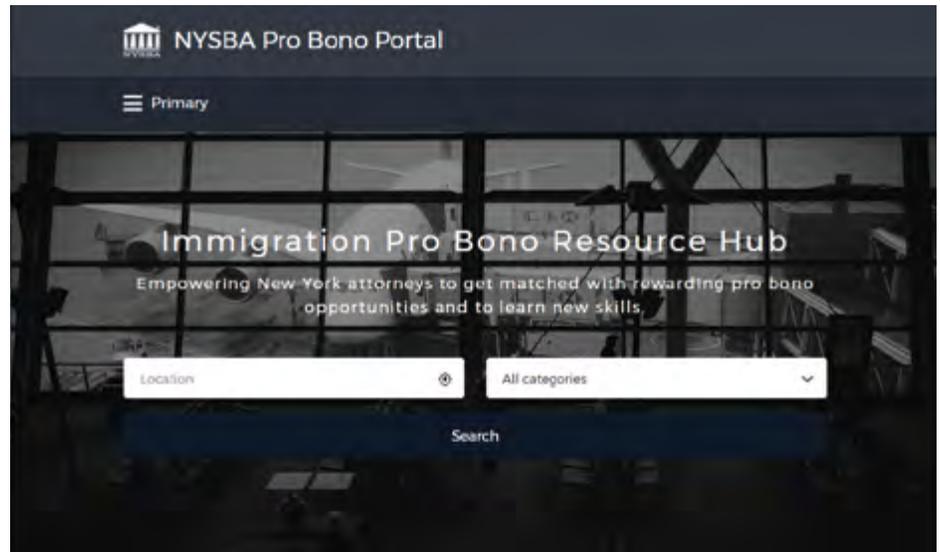
The portal allows attorneys, whether they are NYSBA members or not, to easily create profiles, specifying their skills, interests, proficiencies, and indicate the level of pro bono work they would like to do. On the other side of the equation, legal service organizations can likewise create profiles, providing data about their volunteer needs, resources, and upcoming volunteer opportunities. A dedicated staff member will refer attorneys to organizations in a way that is best suited for them and the organizations. The attorney and the organization will then contact one another to further solidify the volunteer relationship and confirm assignments. Using the speed and efficiency of the portal, with an added human touch the volunteers will be referred to organizations quickly and

effectively. If an attorney wishes to volunteer but lacks training or experience, the platform will be able to point the volunteer to information regarding relevant training opportunities.

The Immigration Pro Bono Portal will also house training materials and other information important to attorneys seeking to assist individuals with immigration-related legal needs. It will be a "one stop shop" for interested attorneys seeking to assist the immigrant community, while providing legal service providers with an amplified platform to promote their volunteer needs.

This portal is being developed with Legal.io, the technology company that recently developed NYSBA's new online Lawyer Referral Information Service platform ([www.FindaLawyerNYS.org](http://www.FindaLawyerNYS.org)). If you are interested in volunteering through the Immigration Pro Bono Portal, visit [www.nysbaprobono.org](http://www.nysbaprobono.org) and sign up. Questions? Email [probonoport@nysba.org](mailto:probonoport@nysba.org) or call 518-487-5642

*Kristen Wagner is NYSBA's Director of Pro Bono Services.*



# The Brooklyn Volunteer Lawyers Project Receives State Bar's Cometa Award

The Brooklyn Volunteer Lawyers Project (VLP) has been honored with the New York State Bar Association's 2017 Angelo T. Cometa Award for its longtime commitment to recruiting and training volunteer attorneys for pro bono work.

Since 1990, volunteers from the private bar have provided pro bono help through VLP to thousands of residents in Brooklyn's poorest neighborhoods. Last year, VLP trained and supervised more than 500 volunteer attorneys and other legal professionals, who provided 12,400 hours of pro bono work in areas such as family law, elder law, and consumer law.

"I applaud the work of the Brooklyn Volunteer Lawyers' Project," said Elena Jaffe Tastensen of Saratoga Springs, who chairs the State Bar's Committee on Lawyer Referral Service. "Countless low-income New Yorkers, who otherwise would have been unrepresented, have been served by the Brooklyn Volunteer Lawyer's

Project, and their network of pro bono attorneys."

Accepting the award on VLP's behalf was Sidney Cherubin, director of legal services, who trains and supervises volunteer lawyers. Many of the volunteers receive pro bono CLE credit for their work. The award recognizes individuals or groups in New York that demonstrate extraordinary commitment toward advancing the goals of the Lawyer Referral and Information Service.

The award is named for Angelo T. Cometa, president of the State Bar between 1990 and 1991. During his presidency, the Association created its Lawyer Assistance Program, Pro Bono Department and what is now known as the Department of Law Practice Management. In 2007, he was honored with the inaugural Angelo T. Cometa Award, named to recognize his leadership of the Committee on Lawyer Referral Service. Cometa died in 2014.



Sidney Cherubin VLP's Director of legal Services and Claire P. Gutekunst former NYSBA President.

## CONNECT WITH NYSBA

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NEW YORK STATE BAR ASSOCIATION  
Lawyer Referral

**Eva Valentin-Espinal**, Manager,  
Lawyer Referral and Information Service

[www.nysba.org](http://www.nysba.org)

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## Interested in expanding your client base?

Do you practice in one of these counties...?

Allegany, Cattaraugus, Cayuga, Chautauqua, Chemung, Chenango, Clinton, Columbia, Cortland, Delaware, Essex, Franklin, Fulton, Genesee, Greene, Hamilton, Herkimer, Jefferson, Lewis, Livingston, Madison, Montgomery, Niagara, Oneida, Ontario, Orleans, Oswego, Otsego, Putnam, Rensselaer, St. Lawrence, Saratoga, Schenectady, Schoharie, Schuyler, Seneca, Steuben, Sullivan, Tioga, Tompkins, Ulster, Warren, Washington, Wayne, Wyoming, Yates

Give us a call! **800.342.3661**  
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NEW YORK CITY  
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