



Volume 17 / Issue 1 / Winter 2024

# CALSP<sup>ro</sup> PRESS

California Association of Legal Support Professionals

## A PROCESS SERVING STORY:

Serving Husband and Wife  
Movie Producers (page 9)



# Inside This Issue

## COLUMNS

- 1 **President's Message**
- 2 **Capitol Report**
- 3 **Legislative Update**
- 4 **Membership Update**
- 5 **Conference Update**
- 6 **Continuing Education Report**
- 6 **CALSPro Board Update**
- 7 **CALSPro Bylaws**

## FEATURES

- 9 **A Process Serving Story**  
Steve Janney
- 11 **Marketing Strategies for Process Servers**  
Esteban Pujol
- 12 **Top 50 Business Listing Websites  
(How to Generate More Business!)**  
Mike Reid
- 15 **The Future is Already Here  
(The Benefit of In-field Mobile Apps)**  
Dennis Barber
- 15 **Member Spotlight**  
Larry Sukay

## ADVERTISERS

- 20 **Direct Legal Support**

### eDelivery of your CALSPro Press

The CALSPro Newsletter is available in electronic format only! Make sure we have your current e-mail address, so you don't miss an issue: [stephanie@calad-management.com](mailto:stephanie@calad-management.com)

### California Association of Legal Support Professionals

2520 Venture Oaks Way, Suite 150  
Sacramento, California 95833  
Phone: (916) 239-4065 • Fax: (916) 924-7323  
Web site: [www.calspro.org](http://www.calspro.org) • E-mail: [info@calspro.org](mailto:info@calspro.org)



CALSPro is not responsible for the accuracy of any comments herein relating to their own case or actual law. All readers should do research as to the actual legality of any issue. Opinions, viewpoints, or articles published under a byline and appearing in this newsletter do not necessarily reflect the official position of this association. Acceptance of advertisements in no way constitutes professional approval or endorsement by CALSPro. No anonymous "Letters to the Editor" will be printed. Your name will be withheld upon request.

© Copyright 2024, California Association of Legal Support Professionals. No material may be reproduced without the express written consent of the publisher. Controlled circulation postage paid in Sacramento, CA.



# President's Message

KRISTIAN PUJOL  
2024 CALSPro President

## An Oath to Growth

This year is off to a busy start as usual for CALSPro. All our association's committees have been very active in their different capacities and have succeeded in launching their objectives early in the year thanks to the leadership and resolve of many volunteers across our industry. As you will read in the following pages, the reports from our Cornerstones (Legislative, Membership, Education and Conference) and other committees will update you on the progress and plans for the year made thus far; affirming your membership is good hands, as always, and looking out for your best interest.

In 2024, we continue to focus on two goals: financial sustainability and continuity of our core legislative and education agendas. Last year, we were successful in balancing our budget without having to rely on "non-recurring revenue streams" and this year, with the implementation of the new tiered active membership structure, we aim to establish a realistic financial base we can rely on for future purposes and build upon.

Beyond these two principal objectives, at our 2023 Conference in San Diego I also shared a long-term vision based on the growing concern for the declining numbers of process servers and professional photocopiers, not only in California but across the United States. I enumerated five very important goals we need to focus on as an industry if we are going to endure the hardship and evolve collectively in composition and leadership (human resources/labor force), technology (utilizing

app-based software and automation), and legal trade professionalism (improved occupational status); all of these are necessary components to procure a better future for all of us in the long run.

### Five Point Industry Plan

- 1. Appeal** to new prospective legal support professionals.
- 2. Educate** process servers, private investigators, and professional photocopiers.
- 3. Grow** our association by exponentially increasing membership.
- 4. Professionalize** our industry by providing educational and certification opportunities, plus changing registration process to fall under the California State Bar association.
- 5. Safeguard** our profession through legislative advocacy and legal protections.

Simply put, we need to **appeal** to a new generational workforce and attract them to our legal industry. Many process servers have moved on or retired since the pandemic. Moreover, with increasing competition from gig economy jobs and a 40% decrease in California process servers in the last decade, we really need to pay attention to our demographics and try to increase our labor force.

Second, the most recent data shows there are approximately 3,500 current process serving registrations (including individuals and corporations) and less than 200 professional photocopier registrations in California, but the overwhelming majority of these have never taken a CCPS course and/or lack training and education.

By **educating** our workforce on civil procedures and the benefits of joining CALSPro, we can **grow** our association which is the third aim. Less than 10% of the California RPS population are members of our state and national associations! Where is the disconnect? Which technologies can we best use to reach our target audience? This year, to address the financial entry barrier, a bylaw amendment changed the active membership due structure to offer affordability to the small and middle-sized companies.

The fourth aim is to lift the status of our **profession** to help us achieve more credibility and improve reputation. One way to do this is by moving the registration process from the county level to the state level (as Private Investigators and Notaries) but under the State Bar. Alongside our educational platform and Certification program, we will expand on the knowledgebase and bring more expertise to our membership, thereby protecting them and our stakeholders (customers and litigants). Finally, and most important, with financial sustainability

*continued on page 18*



# Capitol Report

MICHAEL D. BELOTE, ESQ. &  
CLIFF COSTA, ESQ.

California Advocates, Inc.

## Game Time in Sacramento: 2024 Legislative Session

**I**t is game time here in Sacramento as the California Legislature has begun its second year of the 2023-2024 session, promising a plethora of bills, budgets, and ballot battles. The second year always begins with a bang, as each house hurries to dispense with bills which will either be sent to the other house by January 31 or die. The Governor also customarily released his 2024-2025 proposed budget on January 10, which is discussed further below.

For CALSPro, every session is demanding, requiring a thorough game plan and ability to adapt when issues arise. Like Mike Tyson once said, “everyone has a game plan until they get punched in the mouth.” Each year approximately 2,500 new bills are introduced in Sacramento. A rough guess is that each bill is amended at least 3-4 times before it passes or dies. Each bill and each amendment must be read for possible relevance to CALSPro, because bills can be “gutted and amended” to suddenly affect the association and its members. CALSPro is ready to meet this year’s challenge through our hardworking legislative committee under Chad Barger’s leadership and CALSPro President Kristian Pujol.

The legislative process moves in calculated steps, punctuated by critical deadlines. The first milestone, the deadline to introduce new bills for 2024, was Friday, February 16, with most bills being introduced very close to the deadline. Under the state constitution, bills must be “in print” at least 30 days before they may be heard

by committees, so the period between roughly the end of February and the end of March tend to be slower for the committee process. Then, a frantic process unfolds as hearings occur between the middle of March and the first week of May.

Meanwhile, the Governor releases his budget proposal in January, each house introduces its version as a bill, and the budget committees in each house are divided into subcommittees. These subcommittees meet throughout the late winter and early spring, sending their actions to the full budget committees. An Assembly-Senate conference committee is convened to reconcile differences between the two houses, and the final budget is sent to the Governor on or before June 15.

Because of California’s infamous budget volatility, things can change suddenly. Put simply, the times of budget plenty, in Sacramento have ended. Now the budget outlook is clouded by a massive disagreement over the size of the state’s deficit. The Legislative Analyst Office (LAO) predicts an adjusted \$58 billion hole, while Governor Newsom’s proposed budget assumes a much smaller \$37.9 billion shortfall. This discrepancy boils down to differing opinions on future revenue and spending. Governor Newsom’s lower figure relies on delayed payments and reserve funds. On the other hand, the LAO’s projections have historically been more accurate than governors’ predictions, as the LAO is not as subject to political influences.

Complicating matters, California’s volatile tax system makes accurate forecasting a challenge. The state’s overall budget is heavily reliant on the capital gains income from a few relatively wealthy residents. Thus, our state revenues closely align with the health of the stock market. Recent month-over-month tax receipts have shown projected shortfalls. While definitive answers remain elusive, one thing is clear: California faces a significant budget problem requiring careful navigation, regardless of the exact deficit figure.

The Governor’s budget proposes a generally flat spending plan for the judicial branch, allocating \$5.2 billion in combined operating and facility funds. This maintains critical programs and services despite utilizing one-time measures like transfers and unspent funds. Crucially, no baseline court budget reductions are proposed in either the current or upcoming year. This represents a relatively positive start as we wait for April’s tax filing deadline and the Governor’s May Revision.

As important as the legislative and budget processes are, there is a sense this year in Sacramento that the initiative process may impact both. Not widely known publicly is the Legislature’s ability to influence which initiatives ultimately appear on the ballots. Initiative proponents now have the ability to remove proposals from the ballot if the Legislature acts to their satisfaction. Not

*continued on page 18*



# Legislative Update

CHAD BARGER, **CALSPRO** Legislative Chair

**C**an you believe it is 2024? Time sure does fly when you are having fun. 2024 has started off with a bang and we are beginning the process of reviewing two thousand plus bills that will be introduced by Friday, February 16<sup>th</sup>. Your legislative committee and our advocates are committed to excellence and work extremely hard to keep our industry protected, as we have done since 1969.

Each year the legislative chair chooses multiple individuals to serve on the committee. Your 2024 committee members are Andy Estin, Tony Klein, Tom Bowman, and Jackie Janney. As part of our mentoring program the chair can also choose a Co-Chair to mentor for a smooth and easy transition as the next legislative chair; that person is Kristian Pujol. Kristian has great interest in the legislative committee and served as my co-chair last year. His experience and knowledge are greatly appreciated and welcomed.

Last December, the board of directors and the legislative committee met to discuss current issues our members are facing and the best ways to resolve them. We also discussed new bills we would like to present and the best way to present them. After deliberation, the committee presented these items to the board for their approval.

**1. Give our legislative advocates approval to continue conversations and potentially present a bill to move**

**process server and photocopier registrations to the California State Bar.**

**2. Present legislation on the prison service bill.**

**3. Continue conversations with the Los Angeles County Sheriff and begin conversations with the banking association, and other necessary parties regarding potential regional service of process agents and/or other solutions to the writ issue.**

### **Process Server and Photocopier Registration through the California State Bar:**

Several years ago, we presented a bill that would have moved process server registration from the county level to the State Bar of California. At the request of the Chief Justice, we withdrew our bill and have been waiting for the right time to present it again. Previously, the state bar was in shambles and was dealing with their failure to properly deal with disgraced attorney, Thomas Girardi for defrauding his clients of millions of dollars. Now that the state bar has gone through an overhaul, our advocate, Mike Belote believes 2024 may be the year to present our idea again. The board has asked our advocates Mike Belote and Cliff Costa to continue discussions with the state bar. While this is exciting news, there is still much to be determined, but the next steps are to have the state bar estimate the potential cost and develop a

program to govern us. Our advocates will provide an update on the progress today.

### **Service at State Correctional Facilities, a.k.a. the Prison Service Bill (SB1040):**

This is a continuation of our prison service bill from the 2022-2023 session. Our members are still dealing with the issue of diligence at prison and jail facilities. With strong opposition to our previous bill from the ACLU and Assembly Public Safety Committee, we agreed to scrap the "Personal Service" prong because of the objections and hurdles it created. However, we agreed to eliminate the diligence requirement, allowing for substituted service on the first attempt. Our advocate suggested we introduce a new bill to the senate public safety committee, where we have friends that can help us push this through. On February 7, 2024, we presented SB1040, which is being carried by Senator Ochoa Bogh. We hope this new bill and approach will result in the bill's passage.

### **Los Angeles County Sheriff and Banks Issue (AB2067):**

We have made great progress with the Los Angeles County Sheriff's Department and their Civil Section leader, Captain O'Brien. The implementation of the online appointment system has taken place and things are better, but not perfect. At our last meeting we asked our advocates to

*continued on page 18*



# Membership Update

LARRY KIRLIN, CALSPro Membership Chair

## 10X Return on Investment

As the membership chairman, I have the opportunity to speak with many of our members throughout the year. Those conversations give me a great deal of insight into the reasons people join the association. I also speak to those members who chose not to renew.

In my last article, I mentioned that getting new jobs from other members is an important reason some people join CALSPro. That leads me to the subject of this article and a recent conversation I had with Mike Reid, who many of you know. One of Mike's ventures is Mighty Website Builder, a CALSPro Vendor member. Websites and Hosting Services for Small Business Owners ([mightywebsitebuilder.com](http://mightywebsitebuilder.com)). Through this company, he has the opportunity to work with many CALSPro and NAPPS members on their websites and marketing strategies.

Mike has a great mind for marketing and, being in the business, has first-hand knowledge of the economics of running an attorney service. During our conversation, we spoke about the need to show CALSPro's value to our members in a concise manner. Mike went a step further. He thinks that people want to see a 10x return on investment. That's 10 times out versus what you put in. He

challenged me to demonstrate that value to our members.

I know for a fact that I can't guarantee 10X value in new jobs rolling in from other members. That's just not how CALSPro works. What I can offer are intangibles such as: The priceless wisdom of our veteran members they are so willing to share. Our legislative program that silently protects your business day and night. Our education program that keeps

you up to date on new rules and industry standards.

The list goes on, and I will expand on it throughout the year. My goal is to find that 10x Mike talked about. In the meantime, check out this blog post from fellow board member, Jason Burke. <https://drlegalprocess.com/calspro-why-im-a-member-of-the-california-association-of-legal-support-professionals/> Jason does a wonderful job of detailing how CALSPro is important to him and his business. 🌐





# SAVE THE DATE

**56<sup>TH</sup> Annual Conference**  
September 27-29, 2024  
Hilton Sacramento Arden West



## Conference Update

DAN MORA, **CALSPPro Conference Chair**


### 2024 CALSPPro Conference is Scheduled

**I**t's time to mark your calendars. This year's CALSPPro Conference is scheduled! It's never too early to plan, especially on topics your business can't afford to miss. Our goal is maximum participation. Our plan to achieve this is to provide the best education opportunity in California! CALSPPro has over 50 years of rich and productive legislative advocacy. Industry leaders will gather and share their best practices. Network and promote your business to other process servers at this year's conference in Sacramento!

We need your feedback. What topics do you need to hear about? We are currently developing our education agenda. We need to hear from you, so we can give you the best conference possible!

Please email me at [dan@gemini.legal](mailto:dan@gemini.legal) with your ideas. (Random "Hello!" emails are welcome too. ;)

**Hilton Arden Sacramento**  
**SAVE THE DATE: September 27-29, 2024**

Speaking about planning, please note that we are not raising registration fees this cycle. We will publish registration and sponsorship rates soon, but for budgeting purposes, look at last year's rates for a reference. 





# Continuing Education Report

ROBERT PORAMBO, **CALSPRO** Education Chair

## 2024 CCPS Workshops and Examinations

All classes will be virtual via Zoom:

**4-13-24 Saturday**

**6-19-24 Juneteenth-Courts Closed**

**8-17-24 Saturday**

**9-27-24 CALSPRO Conference**

**A**t the end of 2023 the Continuing Education committee worked diligently to update the CCPS test. The CCPS class is not only for registered process servers, all of your office staff should take this to be aware of the rules of serving process.

Please join us at one of the above classes in 2024.

The Continuing Education committee looks forward to serving our members and the legal community this year. 🌐



## CALSPRO Board Update

JACKIE JANNEY, **Chairman of the Board**

**O**n 1/31/24 a vacancy was created on the Board for CALSPRO. After years of service to the membership of CALSPRO Tom Bowman resigned his position on the Board, he will be greatly missed by all members of the Board.

At the Board meeting on 1/31/24 as per Article VI section 9 of our By Laws the Board

voted to have Jason Burke fill the vacancy. Jason Burke ran in the 2023 elections and had the next most votes. We appreciate him stepping up to fill the vacancy.

The CALSPRO Board of Directors is working hard for our membership, please see our legislate chair Chad Barger's article in the newsletter. He has written all about the

ills and issues the Board will be working on this year, such as the Prison Service Bill (SB1040) where we are trying to get the diligence requirement removed like we did for CMRAs. Also, the issues we are facing with Los Angeles County Sheriff and Banks Issues (AB2067). 🌐

# Bylaws

## CALSPRO Bylaws

THOMAS ALKEMA, **Bylaws Chair**

### Vacancy of an Officer

**G**reetings association members. As part of the goals of the leadership of CALSPRO, we endeavor to inform our members of not only what we do, but why we do certain things the way we do. As with any California organization, CALSPRO operates under a certain set of bylaws, and as the Chairman of the Bylaws Committee, I, from time to time, am here to inform our members of our bylaws.

With that as the background, and in conjunction with the article from our esteemed Chairperson, Jackie Janney, I am sharing in this article the section related to the vacancy of an office: a Board of Director.

#### **ARTICLE VI – MANAGEMENT, OFFICERS, BOARD OF DIRECTORS**

**Section 9.** A vacancy created in any office shall be filled for the unexpired term of office by a majority vote of the Board of Directors except those vacancies created at a regular annual meeting, which shall be filled by a vote of the majority of members present. The vote may be taken by a poll of the members of the Board of Directors through correspondence by the Chairman of the Board of Directors or at the next meeting of the Board of

Directors. No member shall be eligible to fill such vacancy unless he/she has been a member for one (1) year. In the event that a vacancy occurs in the Presidency or the office of Secretary-Treasurer, the Board shall meet and

elect a successor within thirty (30) days of the date such vacancy was created.

On behalf of the Association leadership and members, thank you for taking the time to read the above. ☺







# A Process Serving Story

STEVE JANNEY, **Janney and Janney**

**M**any will agree that getting a few process servers together will ultimately lead to sharing stories. We all have at least one. I served my first paper in 1969, and while I have a few, the following is one of my favorites.

One day, we received an assignment to serve a husband and wife with a summons, complaint, and temporary restraining order. While the summons and complaint could be sub-served, the TRO had to be personally served. The attorney was adamant that they both had to be served simultaneously.

As we discussed the assignment with our client, we learned the defendants were producers in the movie business. Our client suggested I call and make an appointment to discuss an aspect of movie production as a way to make contact with the defendants. I thought that is a great idea. However, what topic would ensure both subjects would agree and attend to a meeting?

A good process serving story needs a little subterfuge. It has to be both unbelievable and incredible. And making a significant sum of money helps. I came up with the following story.

Historical miniseries were big on television then, so I decided to play that angle. I called the defendant and introduced myself as Steve Johanson. I had just graduated from the University of Illinois with a Ph.D. in history. My dissertation dealt with the League of Nations and President Woodrow Wilson's attempts to gain admission for the United States. My professor thought it could be a miniseries and suggested I make some calls.

*continued on page 10*

The defendant started to hem and haw, citing the cost of producing a movie, let alone from an unknown author. Then I set the hook. I had forgotten to mention that my father was a surgeon in Chicago. He and some of his friends would like to invest in this project. Suddenly, a meeting was not only possible but also necessary.

The best chance to get them together was to schedule something midafternoon at their house. It was agreed that the following Tuesday at 2:00 pm, I would come to their home with my dissertation, and we could discuss the project.

I arrived at 2:00 pm and knocked on the door. I had the documents easily accessible in my briefcase and had hoped they would answer the door together. But when the door opened, it was the husband only. I was invited in and led to the living room.

Much to my surprise, there were three other people in the room. They were part of the production team and excited about discussing a plan. The wife was nowhere to be seen. She was upstairs dealing with one of their children and would be downstairs shortly. “We can begin discussions without her,” said the husband.

I am a history buff but didn’t know much about the League of Nations. Stalling for time, I began with an introduction of Steve Johanson. His story was much like mine until grad school; then, I used the story of a friend who had done graduate work at the University of Illinois. I was ready to fake a heart attack when the wife finally descended the stairs.

She went and stood by her husband. I approached to shake her hand, reached into my briefcase, and served them both. All five of them were shocked, offering no response. I turned and headed for the door, showing myself the way out. I jumped in my car and headed back to the office.

The client was ecstatic, and I had a story. I had paid my dues, made my bones, and could now hang out at the CALSPro conferences and not just listen. It was a good day for everyone but the defendants. ©





# Marketing Strategies for Process Servers

ESTEBAN PUJOL, **Advertising Chair**

**A**dvertising for process servers should focus on reaching your target market: legal professionals, law firms, attorneys, paralegals and administrators. Whether you manage your marketing campaign in-house or hire a professional firm to manage, here are some effective advertising strategies to consider:

**1. Online Directories:**

List your services on legal service directories like LegalZoom, Avvo, or FindLaw, where individuals and law firms often search for process servers.

**2. Search Engine Marketing (SEM):**

Utilize Google Ads to target keywords related to process serving in your area. This can ensure visibility when people search for process servers online.

**3. Social Media Advertising:**

Run targeted ads on platforms like LinkedIn and Facebook, focusing on legal professionals and law firms in your region. Highlight your reliability, efficiency, and expertise in serving legal documents.

**4. Legal Publications & Magazines:**

Advertise in legal magazines, journals, and newsletters that are

read by attorneys, paralegals, and legal professionals.

**5. Professional Associations:**

Join and advertise through professional associations like the National Association of Professional Process Servers (NAPPS) or state-level associations like the California Association of Legal Support Professionals (CALSPRO). They often have directories and advertising opportunities for members.

**6. Networking Events:**

Attend legal conferences, seminars, and networking events to connect with attorneys and legal professionals. Hand out business cards and brochures showcasing your services.

**7. Website Optimization:**

Ensure your website is optimized for search engines (SEO) so that it ranks well when people search for process servers in your area. Include relevant keywords, testimonials, and service details.

**8. Local Business Directories:**

List your process serving business on local directories like Yelp, Google My Business, and Yellow Pages.

Many people search for local services through these platforms.

**9. Direct Mail Campaigns:**

Send targeted direct mail campaigns to law firms and legal departments introducing your services. Include a compelling offer or incentive to encourage them to try your services.

**10. Referral Programs:**

Implement a referral program where existing clients or legal professionals can earn rewards or discounts for referring new clients to your process serving business.

By utilizing a combination of these advertising options, you can effectively reach your target audience and generate leads for your process serving and or legal support business. In fact, CALSPRO offers cost effective advertising options to help promote your business, and reach a wide network of fellow legal professionals all while supporting our beloved association.

If you'd like to learn more about the advertising options available, you can login into the members only section of [www.Calspro.org](http://www.Calspro.org) or feel free to reach out to me directly at: [esteban.pujol@steno.com](mailto:esteban.pujol@steno.com). I might even be able to share a promo code with you! 🎁

# Top 50 Business Listing Websites (How to Generate More Business!)



MIKE REID, 123 Legal Support,  
MightyWebsiteBuilder.com

**T**hank you California Association of Legal Support Professionals (CALSPRO) for inspiring me to start writing again! As business owners we are always deciding between this urgent task or the other. But when the State Association that keeps an entire profession alive asks you to share. You share....

Mr. Larry Kirlin and I have known each other for sometime now. I met Larry at the first CALSPRO conference I attended. He's been a resource along my journey and I'm proud to say that I'm happy to give back.

I started my business, 123 Legal Support, in 2013 and it really only took off in 2015 when I started to learn about marketing. First, I learned about the importance of having a professional website, then having a professional email and signature. Each of these lessons actually came from members of CALSPRO seeing that I was doing things to hurt my own company.

Recently, I was asked, why I started a marketing company?

"I became fascinated with all things marketing because as I implemented a new automation, or added myself to a new platform and learned all about it, and Walla! I received new, Trackable business to my company. It was a learning process and I'm still learning each and every day, but I'm committed to paying it forward in any way I can."

In February of 2015, I learned the most valuable lesson of all, when I came across a list of potential business listings where you could list your business for free and people may find your website and call you.

I filled it out and it took me a few days to add my company information to each website. However, what was way more impactful was what I like to call "The Backlink Factor." This one thing made more of an impact on my business than any other because it made my website rank above the search directories on the first page of google. I've since used this same method to rank in four other major metro markets and I'm going to share it with you today.

*continued on page 13*

Google Process server IN YOUR CITY

All Perspectives Maps Images News More Tools

About 794,000 results (0.39 seconds)

**Affordable Legal Assistance - Roseville, Ca**  
https://www.123legalservices.com

**Affordable Legal Assistance - Roseville, Ca - Home**  
Affordable Legal Services provides low cost legal paperwork for divorces, estates, trusts, and bankruptcies in Roseville, Sacramento, and the greater ...

123legalsupport.com  
https://www.123legalsupport.com > contact

**Contact Us | 123 Legal Support**  
Our Locations: . SACRAMENTO, CALIFORNIA. 2014 Capitol Ave, Suite 100. Sacramento, CA 95811. Phone: 833-693-3453. Email: hello@123efile.com.

LinkedIn - 123 Legal Support  
10+ followers

**123 Legal Support**  
... | California's Most Trusted Legal Support Provider! Based in Sacramento California

**Affordable Legal Assistance**  
4.9 ★★★★★ 159 Google reviews  
Paralegal services provider in Roseville, California

Website Directions Save Call

Located in: Fallcreek OFFICE PARK  
Address: 755 Sunrise Ave Suite 130, Roseville, CA 95661  
Hours: Open · Closes 5PM

If I had a nickel for every time I've heard during a coaching call with a website customer. "We don't do social media " or "We don't need that" or "My clients aren't on there" I'd be way richer than I am today.

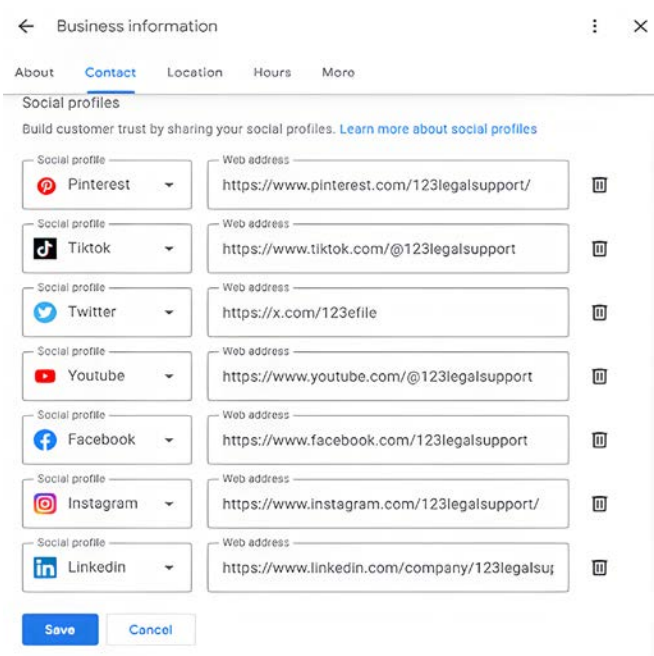
The reality is, you may be right in many instances about your clients not being on TikTok for example. Let me tell you why you should consider it.

Social Platforms tend to have very high domain authority (Helping You Rank Better if You Put your website domain on your profile and link back to it from your website you can get a major boost) - \*See Example Below\*

The TikTokers of today are the clients of tomorrow (When I was a young adult connecting with friends on Facebook I thought I was cool. Old people didn't have it. Once your grandma joined you realized you needed another place to socialize with the "Cool People" of your generation. So we went to instagram and everyone thought it was just for the kiddos.

Automation makes it easy to post on these platforms you're not as excited about without you ever needing to login to them. (But I recommend that you do!)

Now that we have that out of the way. If you don't have a social account with the following social websites. I recommend creating one before you get started with the Business Listings. The reason is that many of the business listing websites ask for your Social Media Links. I created a spreadsheet to help me track my links (you can rip off and duplicate if you'd like) If you have them handy you can easily copy and paste each of them into your new business listing. For example, Google My business (Now Google Business Profile) added a new feature (2024) allowing you to add your most prominent socials.



## Google Business Profile

Here are the social links you should start with as they offer backlinks to your website and you can often advertise to target your exact customer based on their specific demographics.

- Pinterest** – <https://business.pinterest.com>
- TikTok** – <https://www.tiktok.com/business>
- Twitter / X** – <https://business.twitter.com>
- YouTube** – <https://www.youtube.com/account>
- Facebook** – <https://www.facebook.com/business>
- Instagram** – <https://business.instagram.com>
- LinkedIn** – <https://business.linkedin.com>
- Alignable** – <https://www.alignable.com>
- Meetup** – <https://www.meetup.com/pro>
- Quora** – <https://www.quora.com/business>
- Reddit** – <https://www.redditinc.com/advertising>

Now for the business directories, you should use the spreadsheet above to keep track of your final listing link so that you can add it somewhere on your website optimizing for "The Backlink Factor". You may start ranking better on Google and beat the search directories and big companies running ads in your area.

## Top Business Directories

- Google My Business** – <https://www.google.com/business/> (Google Business Profile)
- Bing Places for Business** – <https://www.bingplaces.com/>
- Yelp for Business** – <https://biz.yelp.com/>
- LinkedIn Company Directory** – <https://www.linkedin.com/company/setup/new/>
- Facebook Business Pages** – <https://www.facebook.com/business/pages>
- Apple Maps** – <https://register.apple.com/placesonmaps/>
- Yellow Pages** – <https://adsolutions.yelp.com/>
- Better Business Bureau (BBB)** – <https://www.bbb.org/get-listed>
- Chamber of Commerce** – <https://www.chamberofcommerce.com/>
- Angi (formerly Angie's List)** – <https://www.angi.com/>
- Nextdoor Business Pages** – <https://business.nextdoor.com/>
- Manta** – <https://www.manta.com/>
- Foursquare for Business** – <https://foursquare.com/>
- TripAdvisor** – <https://www.tripadvisor.com/Owners>
- Hotfrog** – <https://www.hotfrog.com/>
- MerchantCircle** – <https://www.merchantcircle.com/>

continued on page 14

**Thumbtack** – <https://www.thumbtack.com/>

**Local.com** – <https://www.local.com/>

**Citysearch** – <http://www.citysearch.com/>

**Superpages** – <https://www.superpages.com/>

**Spoke** – <http://www.spoke.com/>

**Zomato** – <https://www.zomato.com/>

**Crunchbase** – <https://www.crunchbase.com/>

**Alignable** – <https://www.alignable.com/>

**Brownbook** – <https://www.brownbook.net/>

**ShowMeLocal** – <https://www.showmelocal.com/>

**TradeIndia** – <https://www.tradeindia.com/>

**Tuugo** – <https://www.tuugo.us/>

**Lacartes** – <http://www.lacartes.com/>

**Express Business Directory** –  
<https://www.expressbusinessdirectory.com/>

**American Towns** – <https://www.americantowns.com/>

**USCity.net** – <http://uscity.net/>

**BizHWY** – <http://www.bizhwy.com/>

**ChamberofCommerce.com** –  
<https://www.chamberofcommerce.com/>

**City Insider** – <http://cityinsider.com/>

**Discover Our Town** – <http://www.discoverourtown.com/>

**EZlocal** – <https://ezlocal.com/>

**LocalStack** (fka MojoPages) – <https://www.localstack.com/>

**YelloYello** – <https://www.yelloyello.com/>

**GetFave** – <https://www.getfave.com/>

Here are some Niche Specific Ideas to take things to the next level:

**Industry-specific platforms** –

(e.g., Avvo, FindLaw, [ServeNow.com](http://ServeNow.com), [Napps.org](http://Napps.org), [CAPSPro.org](http://CAPSPro.org))

**Professional associations' member directories** –

If you're a Process Server or in the Legal Support Profession I'd Recommend these organizations: [CALSPRO.org](http://CALSPRO.org), [NAPPS.org](http://NAPPS.org), and your local state if they have formed one.

**Local business associations/networks directories** – *BNI*

**Eventbrite** – <https://www.eventbrite.com/>

**Craigslist** (for local forums and bulletin boards)

**Nextdoor** (for community-focused business promotion)

**Medium** (for blogging)

**Blogger** (for blogging)

**Facebook Groups** - Here's my group of almost 2,000 Professionals:  
<https://www.facebook.com/groups/mightyprocessservers>

**Specialized review sites** (e.g., Healthgrades, Houzz)

## Online local news publications' directories or business spotlights

As we wrap up this journey through the landscape of online visibility and marketing strategies, I'm reminded of the saying, "It takes a village." In our case, it's a village of savvy legal support professionals, forward-thinking mentors, and an ever-evolving digital ecosystem that keeps us connected and visible to those who need our services the most.

Reflecting on the journey from the early days of 123 Legal Support to the marketing insights that have shaped my business's trajectory, it's clear that sharing isn't just about broadcasting our successes; it's about contributing to a collective knowledge pool that uplifts the entire profession. Thanks to CALSPRO and the guidance of individuals like Larry Kirlin, the path has been both challenging and rewarding.

For those of you hesitating at the digital doorstep, wondering whether to step into the world of social media, SEO, and online directories, let this be your nudge. Yes, the landscape can be daunting, and yes, the "old farts" among us might have their reservations, but the digital world offers untapped potential for growth, networking, and client engagement that we can't afford to ignore.

So, as we move forward, let's do so with a spirit of curiosity and collaboration. Let's experiment with TikTok, optimize our Google My Business profiles, and maybe, just maybe, give those social media skeptics among us a reason to reconsider. After all, the TikTokers of today are indeed the clients of tomorrow, and our readiness to adapt and innovate will ensure that we're not just seen but sought after.

To my fellow legal support professionals, mentors, and the CALSPRO community, thank you for inspiring this journey. Here's to sharing our stories, strategies, and successes as we navigate the digital currents together. After all, when one of us shines, we all shine a little brighter. ☺



# The Future is Already Here

## *(The Benefits of In-field Mobile Apps)*

DENNIS BARBER, **United Legal**

**T**he utilization of mobile apps, while executing service of process, offers numerous benefits that can streamline the entire service of process procedure. One of the key benefits of using a mobile app is the ability to utilize geo-tagging which provides location and time of service or attempt. With mobile apps, process servers can easily track and record their location when serving legal documents, providing irrefutable evidence of when and where the service took place. This feature not only adds a layer of transparency and accountability but will also help in avoiding disputes regarding service.

Moreover, mobile apps can help process servers stay compliant with California's Civil Code of Procedures. With integrated compliant features and notifications within the app, process servers can ensure that they adhere to local and state requirements as well as customers guidelines. This not only reduces the risk of legal issues but also enhances the overall professionalism and credibility of the process serving procedure.

Furthermore, in today's digital age, clients often expect real-time updates and transparency. Mobile apps can facilitate communication between process servers and clients, providing instant

status updates and increasing overall customer satisfaction. Mobile apps will help meet the customer's expectations for efficient and transparent service of process while also reducing the risk of errors and oversights. This can significantly improve customer satisfaction while building trust with the customer.

In addition, the utilization of mobile apps can play a pivotal role in improving the legal community's perceptions about process servers. By adopting technology that enhances transparency, efficiency, and compliance, process servers can elevate their reputation within the legal community, leading to increased trust and collaboration.

Looking into the future, the integration of mobile apps and technology in process serving will continue to evolve the way service of process is conducted, making the process secure, efficient, and reliable. As a result, the future of process serving is likely to be closely intertwined with technological innovation, with mobile apps playing a central role in driving this transformation.

In conclusion, embracing technological advancements can contribute to positive perceptions within the legal community and prepare process servers for the future of the industry. 🌐





# MEMBER SPOTLIGHT:

## Larry Sukay

### Commercial Insurance Broker Acrisure Insurance CALSPRO Member since 2019

I want to introduce myself; my name is Larry Sukay and I have been a member of CALSPRO since 2019. I am a Commercial Insurance Broker with Acrisure, the 4<sup>th</sup> largest broker in the world. More about Acrisure a little later. Several CALSPRO members are current clients of mine and I'm committed to helping move the CALSPRO organization to a higher level as the leading industry source for the legal support community. My goal here is to provide you with an overview of my background and how I bring value to my clients. In future issues, I'll cover a number of insurance related topics hoping to educate you on the types of coverage you need in this industry, how to buy coverage, how to prevent claims and how to respond when a claim occurs.

#### My Background

I started in the insurance industry at the very young and tender age of 19 when I

was hired at one of the largest hospitals in the country, Allegheny General Hospital in Pittsburgh as a Fire Protection Specialist. I was working on my Fire Science Degree (spent 30 years in the fire service, more on that) at the time and was approached about a part time summer position. Long story short, I was offered a fulltime position at the end of summer and by age 24 was appointed the youngest division head in the history of the hospital.



In 1985 I left Western Pennsylvania for a warmer climate settling in San Diego, CA. I was recruited by Crawford and Company, an Atlanta-based international third-party claims administration company with over 7000 employees in 40 countries to start-up their Risk Management consulting division in Southern California. After five years I started my own firm, providing risk management consulting services with over 150 clients, including several Fortune 500 companies, I built a successful consulting practice providing risk management/senior management consulting services to a variety of industries.

In response to the Workers' Compensation crises that was facing California, I pioneered the concept of Behavioral Risk Management (BRM) approach for reducing Workers' Compensation costs that is now recognized as the "accepted" approach for impacting

*continued on page 17*

losses. The approach was based on the premise that Workers' Compensation was a symptom of larger, more complex organizational issues needing identification. The "Organizational Analysis" focused on seven key areas including; job satisfaction, communications, trust and respect, facility and equipment, team building, training and risk management efforts. Consulting emphasis was placed on providing senior management direction in improving overall operations utilizing Workers' Compensation costs as an indicator of organizational problems that were primarily centered in the employee motivation/behavior area, i.e., Workers' Compensation and employment liability that was a vehicle for disgruntled employees to get "financially even" with the employer.

### What makes me different from other insurance brokers

I am currently a Commercial Insurance broker who operates as an Out Sourced Risk Manager hired by CEO's, CFO's and business owners to bring structure, certainty and savings to their organizations. I do this through processes and systems I developed as a Risk Manager, a Risk Management consultant and currently as a Commercial Insurance Broker. I specialize in coverage analysis, insurance program design and risk mitigation. This is what makes me unique in the industry because of this background. My coverage specialties include: workers compensation, general liability, property coverage's, auto and management liability that includes Directors & Officers, Employment Practices liability insurance, Fiduciary liability insurance, Reps and Warranties coverage for M&A transactions, Crime and Cyber liability insurance.

Another factor that makes me unique in the industry is that I spent 30 years as a volunteer Firefighter. Obtained leadership roles in two separate departments. Deputy Chief in Charge of Training for Western PA department of 400+ personnel, Deputy Chief in Charge of Operations for Elfin Forest/Harmony Grove Fire Department in San Diego County, CA. I was the Branch Director during 1996 Harmony

Grove fire commanding four divisions, 250 personnel, 75 engine companies with the responsibility for planning and implementing strategy and tactics during the height of the firestorm. One of my degrees is in Fire Science so I look at property exposures from a totally different perspective then most of my peers in the industry.



Acrisure is a global Fintech leader that combines the best of humans and high tech to offer multiple financial products and services to millions of businesses and individual clients. We connect clients to solutions that help them protect and grow what matters, including Insurance, Reinsurance, Cyber Services, Mortgage Origination and more. Acrisure employs over 16,000 entrepreneurial colleagues in 21 countries and has grown from \$38 million to \$4 billion in revenue in just over ten years. Our culture is defined by our entrepreneurial spirit and all that comes with it: innovation, client centricity and an indomitable will to win. Additionally, Acrisure is committed to making an impact in our communities by giving back, as seen by our partnerships with Helen Devos Children's Hospital and UPMC Children's Hospital in Pittsburgh.

### Feel free to Call me

Please feel free to give me a call should you have any insurance related questions. Hell, call me even if you have non-insurance related questions. If you're frustrated with your current broker or you have coverage

or policy language concerns, I'm happy to discuss and help you with your concerns. If you need assistance in understanding the insurance purchasing process or you're having multiple workers comp and employment related claims and want to know what can be done ... call me. If you would like to have an objective third party review of your insurance program I'm more than happy to help. 📞

### Contact Information:

**Larry Sukay**

**Commercial Insurance Broker**

**Acrisure Insurance**

**858-210-4595 office**

**760-822-2030 cell**

**2655 Camino Del Rio N, Suite 200**

**San Diego, CA 92108**

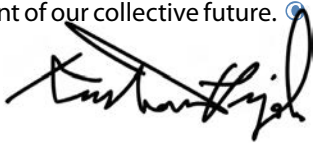


## President's Message

– continued from page 1

CALSPRO will continue to **protect** our industry from adverse legislation and push forth an advocacy agenda to help improve access, benefits, and protections for all our membership while ensuring due process for all individuals.

In following publications and newsletters, you will notice articles and editorials pertaining to some of these central ideas as we try to socialize their importance across our network. I want to thank in advance all the future contributors that will help us raise awareness, uplift the bar, and achieve these goals on behalf of our entire legal community. It is a true joy to work with such a dedicated group of individuals that look beyond their competitive interests and freely come together for the betterment of our collective future. 🌟



## Capitol Report

– continued from page 2

only has this process been used successfully, we continue to hear about quiet but intense negotiations on a few initiatives.

One such initiative proposes a major change in the Private Attorneys General Act (PAGA), which has been tremendously controversial in California ever since its enactment decades ago. Set for November's ballot and backed by a

coalition of business groups, including the CalChamber, New Car Dealers, California Restaurant Association, and others, the Fair Pay and Employer Accountability Act would basically eliminate private enforcement of California's Labor Code. Specifically, the Act would provide a streamlined process to address employees' claims at the Labor Commissioner's office and larger potential recoveries for the employees themselves in the event they are treated unlawfully. An outcome must occur before the summertime deadline to remove it from the November ballot.

Finally, CALSPRO's legislative committee has tasked three offensive measures for action this year. First, continue to explore statewide licensing of registered process servers and professional photocopiers through the State Bar. Second, seek legislation to clarify diligence relating to serving an inmate at a prison and jail. This legislation will build upon prior CALSPRO sponsored legislation. Third, seek legislation to increase the number of places where a large financial institution will accept service of process. This legislation is intended to resolve the growing backlog of writs and levies at the Los Angeles Sheriff's Department. Stay tuned on future articles for further updates on these offensive activities.

The year ahead promises to be fascinating, leaving aside the little matter of the presidential election in November. It is time to settle in, for 2024 promises to be a game you will not want to miss. 🌟

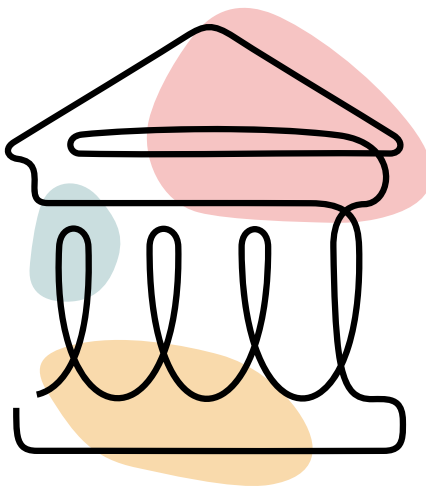
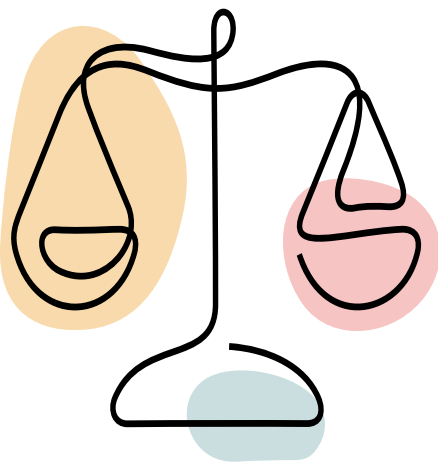


## Legislative Update

– continued from page 3

reach out to the banking association and others to float the idea of creating regional agent for service and/or other solutions to the problem. As you are aware, CCP 684.115 requires banks with nine or more branches to designate one or more central locations for service of legal process within this state. When Bank of America designated CT Corporation in Los Angeles as their agent for service, it created a huge issue for the Los Angeles County Sheriff's Department and court clerks. Our idea is to change CCP 684.115 to require banks to set four or more regional agents for service of process. This would help alleviate the load on the Los Angeles County Sheriff Offices and spread the volume throughout the state. After speaking with the banking association and gaining their broad support for the idea, we presented AB2067 on February 4, 2024, which is being carried by Assembly Member Dixon. We believe this is a logical solution and are optimistic about its success.

In closing, I would like to thank the committee members, the board of directors, and our membership for their support and commitment to protecting and promoting our profession. Without their dedication and the confidence of the membership, we could not do what we do. Legislation has always been and will always be the foundation of CALSPRO and I am proud to be a part of it. 🌟



## CALSPRO 2023-2024 Officers

### **PRESIDENT**

**Kristian Pujol**  
415/475-6424 – ph  
[president@calspro.org](mailto:president@calspro.org)

### **VICE PRESIDENT**

**Michael Kern**  
213/483-4900 – ph  
[vicepresident@calspro.org](mailto:vicepresident@calspro.org)

### **SECRETARY/TREASURER**

**Larry Kirlin**  
559/233-19939 – ph  
[secretary@calspro.org](mailto:secretary@calspro.org)

## 2023-2024 Board of Directors

### **Chad Barger**

661/327-8022 – ph  
661/327-8179 – fax  
[legislative@calspro.org](mailto:legislative@calspro.org)

### **Steve Janney**

213/628-6338 – ph  
[steve@janneyandjanney.com](mailto:steve@janneyandjanney.com)

### **Robert Porambo**

619/685-4223 – ph  
619/685-4294 – fax  
[rporambo@knoxservices.com](mailto:rporambo@knoxservices.com)

### **Jason Burke**

510/797-9996 – ph  
[request@drlegalprocess.com](mailto:request@drlegalprocess.com)

### **David Kern**

213/483-4900 – ph  
866/241-0051 – fax  
[dkern@directlegal.com](mailto:dkern@directlegal.com)

### **Esteban Pujol**

888/707-8336 – ph  
[esteban.pujol@steno.com](mailto:esteban.pujol@steno.com)

### **Jackie Janney**

714/953-9451 – ph  
[jackiej@janneyandjanney.com](mailto:jackiej@janneyandjanney.com)

### **Dan Mora**

556/805-9571 – ph  
559/805-9571 – fax  
[dan@gemini.legal](mailto:dan@gemini.legal)

### **Jonathan Shisler**

916/436-5484 – ph  
877/856-9755 – fax  
[serve@a2zattorneyservice.com](mailto:serve@a2zattorneyservice.com)

### **California Association of Legal Support Professionals**

2520 Venture Oaks Way, Suite 150, Sacramento, California 95833  
Phone: (916) 239-4065 • Fax: (916) 924-7323 • Web site: [www.calspro.org](http://www.calspro.org) • E-mail: [info@calspro.org](mailto:info@calspro.org)

Legislative Advocate  
**Michael D. Belote, Esq.**

Administrator  
**Jennifer Blevins, CMP**  
[jennifer@caladmanagement.com](mailto:jennifer@caladmanagement.com)

Membership/Co-Administrator  
**Stephanie Schoen**  
[stephanie@caladmanagement.com](mailto:stephanie@caladmanagement.com)

Publications  
**John Berkowitz**  
[john@caladmanagement.com](mailto:john@caladmanagement.com)

Communications  
**Cameron Schubert**  
[cameron@caladmanagement.com](mailto:cameron@caladmanagement.com)

Webmaster  
**Michael Cochran**  
[michael@caladmanagement.com](mailto:michael@caladmanagement.com)

CCPS  
**Natalie Sinclair**  
[natalie@caladmanagement.com](mailto:natalie@caladmanagement.com)

Advertising  
**Kelly Hoskins**  
[kelly@caladmanagement.com](mailto:kelly@caladmanagement.com)

Accounting  
**Tricia Schrum, CPA**  
[tricia@caladmanagement.com](mailto:tricia@caladmanagement.com)

Association Management Services  
provided by California Advocates  
Management Services (CAMS)

## CALSPRO Committees

### ADVERTISING

Esteban Pujol  
[advertising@calspro.org](mailto:advertising@calspro.org)

### CONTINUING EDUCATION

Robert Porambo  
[ccps@calspro.org](mailto:ccps@calspro.org)

### MEMBERSHIP

Larry Kirlin  
[membership@calspro.org](mailto:membership@calspro.org)

### ASSAULT ADVISOR

Kraig Vorsatz  
[assaultadvisor@calspro.org](mailto:assaultadvisor@calspro.org)

### DISPUTE RESOLUTION

Jeremiah Jones  
877/353-8281  
[dispute@calspro.org](mailto:dispute@calspro.org)

### NEWSLETTER

David Kern  
[dkern@directlegal.com](mailto:dkern@directlegal.com)

### BY-LAWS

Tom Alkema  
[bylaws@calspro.org](mailto:bylaws@calspro.org)

### FORMS

Tony Klein  
415/495-4221  
[tony@attorneyserviceofsf.com](mailto:tony@attorneyserviceofsf.com)

### TECHNOLOGY

Michael Kern  
[info@directlegal.com](mailto:info@directlegal.com)

### CONFERENCE

Dan Mora  
[conference@calspro.org](mailto:conference@calspro.org)

### LEGISLATIVE

Chad Barger  
[legislative@calspro.org](mailto:legislative@calspro.org)

### WEBSITE

Michael Kern  
[info@directlegal.com](mailto:info@directlegal.com)



# DIRECT LEGAL SUPPORT

RECORDS RETRIEVAL DIVISION

Serving the legal community since 1961



# SUBPOENA SERVICES

## CONTACT US

office:  
(855) 528-1040

fax:  
(213) 277-8600

email:  
rrorders@directlegal.com

- Issuance of State & Federal Subpoenas
- Notice to Consumer
- Medical Authorizations
- Deposition Officer Services
- Status Calls and Correspondence
- Records sent by Encrypted Web Portal

Call or Email for Additional Services and Promotional Information!

 [WWW.DIRECTLEGAL.COM](http://WWW.DIRECTLEGAL.COM)

 1541 Wilshire Blvd, Suite 550 Los Angeles, CA 90017

## ADDITIONAL SERVICES

- X-Ray Duplication with DICOM Viewer
- Radiological Film Duplication
- Records available on CD-ROM, USB, or Printed
- Bates Stamping
- Confidentiality Statements, Watermarks, etc.
- On-Site and Off-Site Scanning
- Paper to Paper Litigation Copying
- Audio/Video, CD/DVD, USB Duplication
- Blue Print Duplication
- OCR Images

**Bundled Pricing for All Services**

**Low Page Rates**

**Contact Us for More Details!**

Deposition Officer Address:

 1541 Wilshire Blvd, Suite 550  
Los Angeles, CA 90017

 [WWW.DIRECTLEGAL.COM](http://WWW.DIRECTLEGAL.COM)

 [rrorders@directlegal.com](mailto:rrorders@directlegal.com)

 (855) 528-1040