

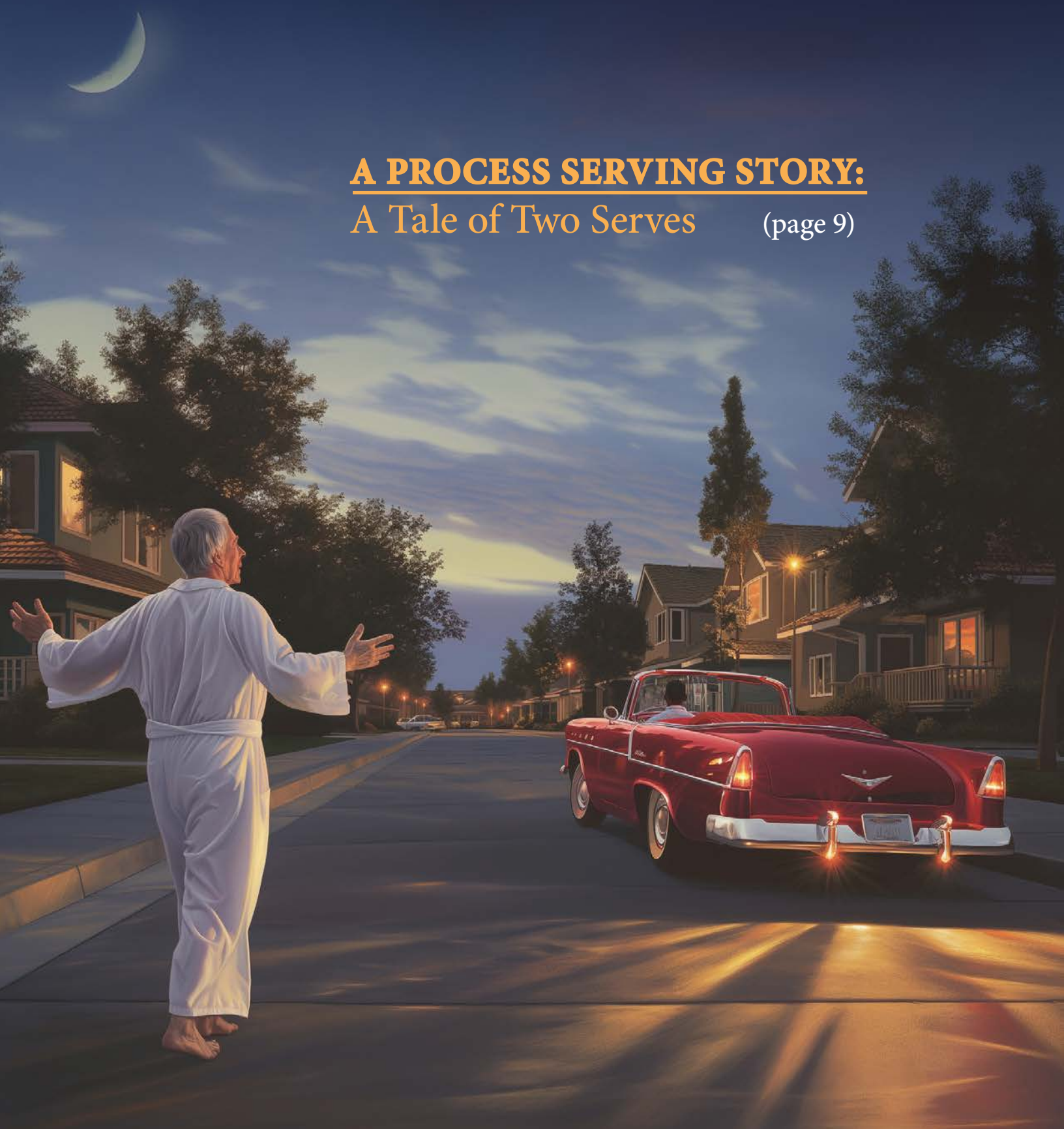


Volume 17 / Issue 2 / Summer 2024

CALSPRO PRESS

California Association of Legal Support Professionals

A PROCESS SERVING STORY:
A Tale of Two Serves (page 9)





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President's Message

KRISTIAN PUJOL
2024 CALSPro President

The Chimes of Change

Summer is officially here, and another productive year is passing us by quickly. Our cornerstones, management and committees have been very active this year especially with the change in membership structure and it being the second year of the California legislative two-year cycle with all the remaining bills trying to get pushed before end of session and the next election.

I realize many of us are busy with our daily work and personal lives and often don't take a moment to sit back, breathe, and look at the big picture. If you do, you will quickly realize there are many changes going on around us (some outside of our control, but the majority within our control if we just get involved). I see a lot of changes within and throughout our industry happening at multiple levels. We are going through a transitional period as a state, legal industry, and association.

Although the COVID pandemic seems to be now a memory, we are still experiencing many of its perpetuating effects through changes in public policy and legal procedures. Starting with the California state courts, most courts have hastened and implemented some form of eFiling in the last four years. With San Francisco County Superior Court launching eFiling on June 3, all the major courts (Los Angeles, Orange, San Diego, Alameda, Contra Costa, San Mateo, Riverside, San Bernardino, and San Francisco) are now mandating electronic filing in all and/or most case types and case initiations. We are also seeing more

online appearances being mandated in both civil and criminal matters. Not only for court hearings, but also many law firms are resorting to online depositions rather than demanding personal appearance. Much of discovery is also now requested and provided in electronic format.

We are crossing into a new legal technological landscape whether we like it or not and have to adapt our processes and mindsets if we are going to thrive and evolve within it. CALSPro and CICA (Coalition for Court Access) have been actively protecting our interests and ensuring our continuous involvement within the legal process, new court case management systems and partnerships with electronic filing managers (EFMs).

Not only has the gradual evolution of eFiling within the judiciary system impacted many legal support companies providing court services, but the change in politics and civil protections are inevitably also challenging our roles and processes as a legal community. With the moratorium on Unlawful Detainer cases coming to an end in all California counties and municipalities, there have been numerous bills and measures trying to address renter rights, rent control and the housing crisis. One that came to our legislative committee's attention in April was AB 2347 (Kalra), which incredulously initially proposed that the presumption of facts in an RPS Proof of Service should not apply in real property possession cases. Our legislative team and advocates immediately stood up for

CALSPro (and all process servers), acted, and within a few days had the author of the bill remove the adverse language pertaining to process server data reliance and integrity. Can you imagine if CALSPro had not been there to act? The snowball effect could have been disastrous.

Our legislative lobbyists, both Mr. Belote and Mr. Costa, have been sharing all the changes going at our capital and the challenges that lay ahead. Did you know that one third of the current legislators are leaving, retiring, and/or are being replaced in the upcoming November election? With new politicians there will be both new opportunities and dangers, but most importantly the established network relationships will dissipate, and we'll need to work extra hard to reestablish and exert our presence and relevance in Sacramento as legal support providers. The attrition and change in guard are also hitting close to home for our Board of Directors as our long time CAMS administrators, both Jenny Blevins (Rosenthal recipient) and Stephanie Schoen are also retiring this year. We will miss them dearly but will continue to forge ahead with CAMS support.

As an association we continue to succeed in our legislative protections but are also undergoing a transitional period since the pandemic. CALSPro lost a third of our membership during this time and needed to act quickly to remain financially sustainable. As a result, we had to adapt, be

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Capitol Report



MICHAEL D. BELOTE, ESQ. &
CLIFF COSTA, ESQ.
California Advocates, Inc.

The Budget Bites

For a very long time, California state government has operated with a notoriously boom and bust budget environment. Only a few years ago, the state enjoyed the benefits of a budget surplus exceeding \$100 billion, larger than the entire budget of many other states combined. Last year the budget picture flipped to a deficit, and for fiscal year 2024-2025, the deficit has been estimated at \$35 to \$55 billion, and perhaps more.

What happened? Was the switch from black to red ink simply a case of mismanagement, or wasteful spending? While it is true that all large organizations, public and private, suffer to some degree from problems of fraud and waste, the California problem is largely structural. Simply stated, the State of California is far too reliant on income taxes. The math is simple as well: the top 1% of California taxpayers (roughly, those with joint incomes of approximately \$1M) pay nearly 50% of California's income tax revenues, and income taxes make up roughly 70% of state revenue. This means that the top 1% are responsible for approximately 35% of the money funding state general fund operations.

Relying on the wealthy may or may not be fair, but it is a very risky proposition from a budgeting standpoint. The problem is that the incomes of the wealthy, and super-wealthy, are highly volatile. The rich tend to make money from investments and capital gains, rather than regular old W-2 wages. When the stock market flattens, or when IPOs are delayed by market conditions,

capital gains revenue goes down and the budget ink turns red. For decades, California governors have attempted to somehow even out this volatility problem, without success.

What happened? Was the switch from black to red ink simply a case of mismanagement, or wasteful spending?

Why should this matter to CALSPro members, other than as citizens? There are at least a couple of reasons. First, budget deficits lead to reductions in spending, obviously. Every proposal to reduce spending creates a political dogfight, where powerful groups argue that someone else should suffer the cuts, not them, in a sort of "cut thee, not me" mindset. This year the governor is proposing a rather across the board cut of 7.95%, which is very likely to be visited upon the state judicial branch as well. A cut of this magnitude amounts to a reduction of approximately \$97 million, spread across the trial courts, appellate courts, and Judicial Council. To the extent that trial court cuts result in hiring freezes, etc. court operations could be affected, although judicial branch leaders are offering reassurance that for at least this year, the cuts can be absorbed.

The other relevant impact of budget cuts is that the legislature has fewer discretionary dollars when it comes to passing bills. For legislative year 2024, ending at midnight August 31, basically any bills that have any significant cost at

all will be difficult to pass. This is where the "budget bites" problem comes in. CALSPro-sponsored SB 1040 (Ochoa Bogh) proposed to standardize procedures for substituted service in prisons and jails. The CALSPro Legislative Committee, chaired by Chad Barger, spent a great deal of time working through the policy questions involved with permitting sub-service after one attempt at prisons, by allowing service upon litigation coordinators or other designated employees at the facilities. The problem is that while the ACLU and other groups wanted legal documents to be treated as "confidential mail" pursuant to current procedures within the California Department of Corrections and Rehabilitation, CDCR argued that this concept would result in increased operational costs of "hundreds of thousands of dollars." Unfortunately, given the budget shortfall, this cost estimate resulted in the bill being held in the Senate Appropriations Committee, where it will die at the end of session in August.

CALSPro's other sponsored bill, AB 2067 (Dixon), attempts to broaden slightly the locations designated by banks for service of writs. The current one-location designation has created severe operational problems in Los Angeles County, and CALSPro has been working on a solution with the California Bankers Association and the California Credit Union League. Thus far the bill is moving forward; expect more news on this soon. ●



Legislative Update

CHAD BARGER, **CALSPro Legislative Chair**

The summer heat is right around the corner, however our lawmakers in Sacramento have been feeling it for months. With the state estimating a twenty-seven-billion-dollar budget deficit for the years 2024-2025, all areas of government will have to operate with less. This includes lawmakers attempting to pass legislation that will have a budget impact.

CALSPro has a long tradition of fighting adverse legislation and proposing legislation that assists our industry. This year has been no different. We presented two bills to the legislature and fought against a bill that would have impacted us. Legislation is the reason we were founded, and it continues to be the driving force today.

Last December, the board of directors approved three legislative items for the committee to focus on. We have put significant effort into these items with hopes all three items could be accomplished this year.

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 agents and/or other solutions to the writ issue.

Process Server and Photocopier Registration through the California State Bar:

Our advocates have been communicating with the State Bar regularly. The State Bar is occupied with an evaluation of fees paid by lawyers for renewal. The State Bar thinks they can start a program of a statewide registration for process servers and professional photocopiers to replace the county-by-county system at about the same amount we are currently paying the county. We anticipate at the start of the new legislative session in 2025, there will be an opportunity to work with the State Bar to make this change. There are still many questions that need to be answered. Communication with our members will be key to making this a reality in 2025.

Service at State Correctional Facilities, aka the Prison Service Bill (SB1040):

After months of effort developing this bill with the ACLU, Public Defenders Association and the Assembly Public Safety committee, the bill was held in our author's suspense file while the costs of the bill were calculated. Unfortunately,

like many other bills that had a cost associated with it, the bill remained in the suspense file and died on May 16th. While we are disappointed, we are not discouraged. We will evaluate our options to determine a path forward. We want to thank State Senator Ochoa Bogh for her efforts, and we look forward to collaborating with her again.

Los Angeles County Sheriff and Banks Issue (AB2067):

We have made progress with our financial institutions' bill. The banking association, credit unions and community banks provided their input and helped form a path forward. Our bill originally presented a change to CCP 684.115 to require banks to have four or more central locations for service of legal process. However, after our discussions with the banks, we agreed to changes to keep the bill moving forward. Now, the bill says that a financial institution can designate a third-party agent and if they do, they must designate at least one additional location in a different county. It also allows banks to designate the same third-party agent, so long as they have multiple locations in different counties and defines the third-party agent to be a non-bank entity who is in the business of accepting service of legal process on behalf of banks and other businesses but does not include

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Membership Update

LARRY KIRLIN, CALSPro Membership Chair

CALSPro Leaders: Our Greatest Member Benefit

I joined CALSPro for the first time in 2008 and attended my first conference the same year. By the time I joined the association, I had already been in the industry for 17 years but still felt like a rookie compared to the people I met at the conference.

Prior to that first conference, I remember hearing stories about industry pillars such

as Tom Bowman, Andy Estin, Steve Janney, Tony Klein, and Stephanie Sayler, just to mention a few. Meeting these giants in person was such an honor. Fast forward 16 years, and now I consider these people my friends.

I remember conversations back then about who would become the next generation of leaders. Who would carry

on the CALSPro legacy? People like Chad Barger, Jeff Karotkin, and Michael Kern became that generation. So, who is next?

If you look at our current board of directors and committees, they are filled with the next generation that will continue the legacy. This healthy leadership continuum proves our association and industry are still vibrant and relevant. Service of process, eFiling, and photocopying will continue to provide business opportunities for many years to come.

Speaking of our leaders and veterans, next time you bump into a board member or volunteer, give them a warm handshake or a pat on the back. Thank them for protecting our industry for over 50 years. Your appreciation is their only compensation.

So, what is next? No one really knows, but I can assure you our leaders at CALSPro are looking towards the future. With their wisdom and guidance, and some help from our legislative advocates, our industry will be going strong for the foreseeable future. 🌐



56TH Annual Conference
September 27-29, 2024
Hilton Sacramento Arden West



Conference Update

DAN MORA, **CALSPRO Conference Chair**

Countdown to Excellence

This year is a can't-miss conference! CALSPRO, again, has prepared the best education opportunity for process servers in California. We listened and are excited to deliver expert panel discussions on topics that you wanted. This education agenda is packed! We especially want to welcome Exhibitors and Sponsors by offering new exclusive benefits. See below for all conference rates and benefits.

When:

September 27th - 29th, 2024

MARK YOUR CALENDAR

Where:

Hilton Arden Sacramento

CALSPRO Guest Room Rate:

\$209.00 per night plus taxes and fees

Room Reservation Deadline:

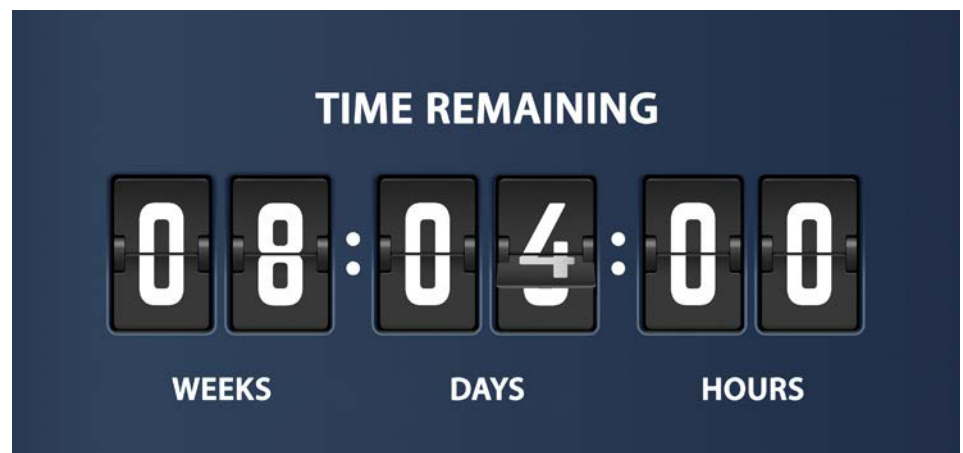
Thursday, September 12, 2024

Hotel Reservations:

Please call 800-445-8667 and ask for the CALSPRO 2024 Conference Rate

Not a member of CALSPRO? Join now and receive 10% off of your full conference purchase, including sponsorships. You will receive a discount code upon membership registration.

[JOIN CALSPRO – CLICK HERE](#)



PANEL EDUCATION AGENDA

How Valuable is My Referral Network?

Learn best practices for referrals and affiliate networking from industry veterans. We will be discussing the best methods and tools for keeping existing clients and obtaining new ones.

Moderator: Jason Burke, D&R Legal Process Service, LLC

Emerging Field Technology

The panel will discuss how mobile/field applications, including tracking, compliance and communication, are

reshaping our industry and enhancing success through transparency and professionalism.

Moderator: Dennis Barber, United Legal

Is Electronic SOP Inevitable?

Opportunity or Threat? We will explore electronic service of process best practices and practical considerations and provide real-world examples of how this evolution is impacting the industry.

Moderator: Jeff Karotkin, Lawgical

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Photocopy Tips and Tricks for New Revenue

Hear from this panel about how to offer photocopy to your clients and affiliates. These insights will help you understand the photocopy landscape and leverage your connections.

Moderator: Mike Callan, Republic Document Management

Process Serving Seminar and CCPS Exam Prep

Prepare you or your staff and learn the essentials of service of process including the elements of service, understanding jurisdictions, tips for difficult serves, and the statutes necessary for compliance.

Moderator: Robert Porambo, Knox Attorney Service

EXHIBITORS & SPONSORSHIPS

This year, CALSPro is offering significant benefits for Exhibitors and Sponsors. Showcase your company alongside the best professional process server education in California. Receive complimentary registration and advertisements. Spots are limited. See offers below.

EXHIBIT BOOTH\$950
 Showcase your valuable products and services to industry decision makers. Exhibitors will receive exclusive advertisement, acknowledgement, and access to all hosted events. Exhibit booths are located in high traffic areas. Don't miss this opportunity. **Register by 8/26/24.**

- \$3,300 Value
- 10x10 Exhibit Space
- 2 passes for the Conference education sessions
- 2 passes to the Saturday Banquet
- 2 passes to the Friday Welcome Event at Topgolf
- Prominent conference program advertisement
- Education session break slideshow advertisement
- Schedule signage
- Registration confirmation e-mail advertisement
- Know-before-you-go e-mail advertisement
- Verbal acknowledgement

[REGISTER TO EXHIBIT – CLICK HERE](#)

DIAMOND SPONSOR \$4,000

- LIMIT 3
- \$5,500 VALUE
- 10x10 Exhibit Space
- Exclusive signage and advertisements
- 2 passes for the education sessions (includes lunch)
- 2 passes to the Saturday Banquet
- 2 passes to the Friday Welcome Event at Topgolf
- Prominent conference program advertisement
- Education session break slideshow advertisement
- Schedule, Banquet, and Welcome signage
- Registration confirmation e-mail advertisement
- Know-before-you-go e-mail advertisement
- Verbal acknowledgement

RUBY SPONSOR \$3,000

- LIMIT 5
- \$3,500 VALUE
- 1 pass for the education sessions (includes lunch)
- 2 passes to the Saturday Banquet
- 2 passes to the Friday Welcome Event at Topgolf
- Conference program advertisement
- Education session break slideshow advertisement
- Schedule, Banquet, and Welcome signage
- Verbal acknowledgement

PEARL SPONSOR \$1,000

- LIMIT 7
- \$1,800 VALUE
- 1 pass for the education sessions (includes lunch)
- 1 pass to the Saturday Banquet
- Conference program advertisement
- Education session break slideshow advertisement
- Schedule, Banquet, and Welcome signage
- Verbal acknowledgement

EDUCATION SPONSOR\$750

- LIMIT 5
- Know-before-you-go e-mail advertisement
- Conference program advertisement
- Door signage
- Education session break slideshow advertisement
- Welcome signage
- Schedule signage
- Verbal acknowledgement

EXHIBITOR BREAKFAST\$500

- LIMIT 3
- Elevator pitch and Q&A opportunity (during breakfast)
- Conference program advertisement
- Door signage
- Verbal acknowledgement

WELCOME EVENT SPONSOR.....\$250

- LIMIT 10
- 1 pass to the Friday Welcome Event at Topgolf
- Conference program advertisement
- Door signage
- Verbal acknowledgement

EDUCATION BREAK SPONSOR\$250

- LIMIT 3
- Conference program advertisement
- Door signage
- Education session break slideshow advertisement
- Schedule signage
- Verbal acknowledgement

BANQUET BAR SPONSOR\$250

- LIMIT 6
- Conference program advertisement
- Door signage
- Banquet signage
- Verbal acknowledgement

[REGISTER TO SPONSOR – CLICK HERE](#)

CONFERENCE PRICING

FULL REGISTRATION MEMBER

On or before August 26th\$450
 After August 26th\$550

FULL REGISTRATION NON-MEMBER

On or before August 26th\$550
 After August 26th\$650
 Full registration includes all events except the Friday night Top Golf event (\$90; see below).

A LA CARTE REGISTRATION

Friday Social Event (includes transportation) ... \$90
 Saturday Lunch Only\$100
 Saturday Banquet Only\$150
 Saturday Education & Lunch (no banquet)\$300

[REGISTER – CLICK HERE](#)

If you have questions, comments, or feedback, please contact me anytime at:

Text: 559-805-9571

E-mail: dan@gemini.legal

Dan Mora, Conference Chair



Continuing Education Report

ROBERT PORAMBO, CALSPro Education Chair

2024 CCPS Workshops and Examinations

W We held a Saturday workshop/examination on Saturday, April 13, 2024. We had 18 attendees. 14 people took the exam and five people passed. We strongly encourage people who pass the examination to put CCPS after their names on proofs and their e-mail signatures.

Congratulations to the following who are now California Certified Process Servers (CCPS):

Margaret Cakebread
Leslie Estrella
Glenn Grainger
Jessica Hodge
Angelo Roman, Jr.

Our next workshop/examination will be virtually held on Saturday, August 17, 2024, beginning promptly at noon.

The CCPS committee looks forward to serving and educating our members and the legal community in 2024! 🌟

Do you have a story worth sharing?
Feel free to reach out to David Kern at dkern@directlegal.com if you would like to share “A Process Serving Story” with our members!



A Tale of Two Serves



JASON BURKE

D&R Legal Process Service

This is a story that I don't think I have shared before. I don't even remember if they happened in the same year. But now I always think of them together, because of the contrast of how each one went down. We don't get a lot of "celebrities" to serve, here in Northern California, like you would in SoCal, but they do occasionally happen.

The Football Coach

I received an assignment to serve a local college football coach, one of those coaches who was known to spend every waking moment watching films and just breathing football. So him being home much was not likely going to be a reality. To add a little flair to the situation, he was either considered the favorite to be hired or had just been hired by the local NFL team – just another wrinkle that could cause things to be difficult, in my mind.

I made my attempts to serve him at the home address. Rather quickly, I spoke to his wife and got the impression that they were expecting the legal papers, so I decided to come clean and let her know exactly what I had for him. Normally, I would stick with

my little white lie of, "I have a delivery for so and so," until the bitter end or until they've made me for a process server. After a short conversation, she told me when to come back in the next day or so and told me she would make sure he was here.

I made my next attempt at the agreed upon time. I made sure I was there a little early and waited to knock on the door until the exact moment I had said I would be there. Seconds later he was standing at the door, taking his documents and signing my work order ... because you know, everybody feels cheated if they don't get to sign for their legal papers.

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I know I have that work order somewhere. It's probably in a box with the backup. I should dig that out, frame it, and hang it on the wall in the office.

The News Caster

This assignment came in, an OEX a.k.a. an ORAP, so personal service only. I don't believe they had much information, but they did know that he worked for a local TV news station, that we would never get him personally served at his home, but they did have his home address.

The name was vaguely familiar, so I googled it to get a picture and I immediately recognized him. I had been watching him on TV for years.

I began making my attempts. He lived in a great gated community. The gate guard knew the law and basically waved me through once I identified myself to them as a California Registered Process Server. He didn't ask who I was serving or where I was going, just took my name, registration number, and license plate down and sent me on my way.

I must have ended up making 10 to 15 attempts, trying to get this guy served, but I could never find anyone home or any signs of life. No cars, no lights. I clipped the paperwork to the door and thought maybe it might still be there on the next attempt, but it would eventually disappear. At some point, I'm sure I confirmed the subject did live there with the guard shack.

Eventually, I made the decision that my next attempt was going to be my last attempt and just put that out there into the universe, like I do sometimes. I drove up to the home and maybe there was one light on inside, the entryway light or something, nothing to get excited about or think anything was different this time. It's dark outside but not too late, 7:30pm to 8:30pm.

I knocked, waited, and repeated the same sequence two more times. I finished making my notes on the work order and turned to leave. Then I heard the door open behind me. I turned to look, and instantly identified the person at the door

as my guy. He looked just like the picture and as he did on TV.

I served him, told him what I had and then extended my arm with the documents to hand them to him. He went ballistic. "How'd you get in here?" "Do you know who I am?" He cussed me out, the whole nine yards. He seemed to believe that the guards were there to keep me out, not required to let me in. That seemed to be his biggest issue as far as I could tell. Of course, I drop-served him and headed back to my car with him hot on my tail, following me down the driveway to the street and my car, yelling at me the whole way.

I'm pretty sure I had to give him the business, nice and loud, in the middle of the street: "I'm a California Registered Process Server! Any Contact With Myself or My Vehicle is a Felony! Back Off!"

I jumped in my car, threw it in reverse for a couple of houses, back into a driveway to turn around, and leave the gated community with him still standing in the middle of the street yelling at me. Celebrating a job well done, I drove off into the night on my way to my next serve.

Lessons Learned

These two stories are linked for me because they are very similar, just with different endings but the same outcome. Both being celebrities make them memorable, but we all experience these two kinds of services nightly. These examples are just

the extreme versions of being cooperative and refusing service.

Trust your gut, don't tell them you're a process server or have legal papers right off the bat. You'll lose your only advantage, the element of surprise, but also don't be afraid to come clean once you're made if you feel THAT will get you more information or the papers served.

Don't be afraid to drop serve documents on someone, you can always print another set of docs and try again or send a different server next time. But you can't sign a proof if you didn't leave the papers.

It's my firm belief that we only get one chance to serve someone – if we miss it, they likely won't answer the door again. So, train yourself and your staff to ask, and your clients to provide as much information as possible: description, pictures, car info, and best times to serve them.

Don't block yourself in. Leave yourself an escape route or turn your car around facing the exit BEFORE making your attempt.

There's nothing wrong with putting it out there – making a positive mental thought or intention – that you have put in the effort to get this assignment served and that *this* will be your final attempt; if it's going to get served, it's now or never. You would be surprised ... more often than not, it gets completed, and you can ask for that 5-star review from your client. 🌟



WELCOME TO TOMORROW!

Modernizing Process Serving Case Management Software Systems (CMSS)



DENNIS BARBER, **United Legal Support Services**



As the demand for efficient and reliable process serving grows, the use of specialized software becomes increasingly important. Case Management Software Systems can help the Process Server streamline administrative tasks, such as scheduling, route optimization, and document management. With the continuing advancement and the use of Process Serving Software, the Process Server can focus on serving documents and meeting deadlines. Utilizing Case Management Software Systems designed for Process Servers, helps organize jobs, track attempts, and log successful services, all within a single platform.

In this article, we will explore the advantages of using Case Management Software Systems for Process Servers in conjunction with in-field applications.

Case Management Software Systems streamline many aspects of the job, offering numerous benefits to individual Process Servers, Attorneys, and Process Serving firms. Using Case Management Software Systems, in conjunction with in-field applications, enhances compliance by providing accurate, real-time tagging and documentation. This connection allows Process Servers to adhere to legal requirements and offer reliable affidavits with a level of transparency that increases trust between the Process Servers and clients.

Enhanced Communication and Collaboration:

Enables better communication and collaboration among Process Servers, clients, and legal teams. Offers features

like real-time updates, allowing clients to track services and receive instant notifications when a service is completed.

Improved Record-Keeping and Documentation:

Maintaining accurate records is crucial in process serving, and Case Management Software Systems simplify these tasks. Detailed service reports, affidavits, and photos can be easily uploaded and stored, making documentation accessible. These records can be quickly retrieved when needed, providing irrefutable evidence and proof of service.

Route Optimization and Mapping:

The route optimization and mapping features can help Process Servers plan efficient routes for serving documents.

Customizable Workflows and Reports:

Offers customizable workflows and reporting options to suit individual needs. Case Management Software Systems allows users to create templates, set up alerts, and generate reports tailored to specific cases. This flexibility helps Process Servers stay organized and meet the unique requirements of each job.

Mobile Access and On-the-Go Tools:

In-field mobile applications provide Process Servers with tools and information on the go. Accessing the 'app' from a mobile device allows servers to stay connected and update job status in real-time. In-field mobile applications include geotagging capabilities that allow Process Servers to tag the exact

location of service attempts and successful services. This geotagging provides irrefutable evidence that a service was conducted at a specified location.

Capture of In-Field Evidence:

Allows Process Servers to capture in-field evidence such as photos or videos directly from their mobile or smart device. This evidence can be attached to the service record, providing visual proof of service. The capture of such evidence strengthens the Process Server's documentation and can be used as legal evidence if a service is challenged.

Trust and Transparency:

The mobile application with geotagged photos provides evidence of service attempts and successful services. Logging of service attempts creates a comprehensive audit trail of process serving activities. This audit trail aids trust and transparency, helping Process Servers demonstrate compliance with legal and ethical standards.

Customizable Reports:

Allows Process Servers to generate customizable reports that can be easily submitted to courts or clients.

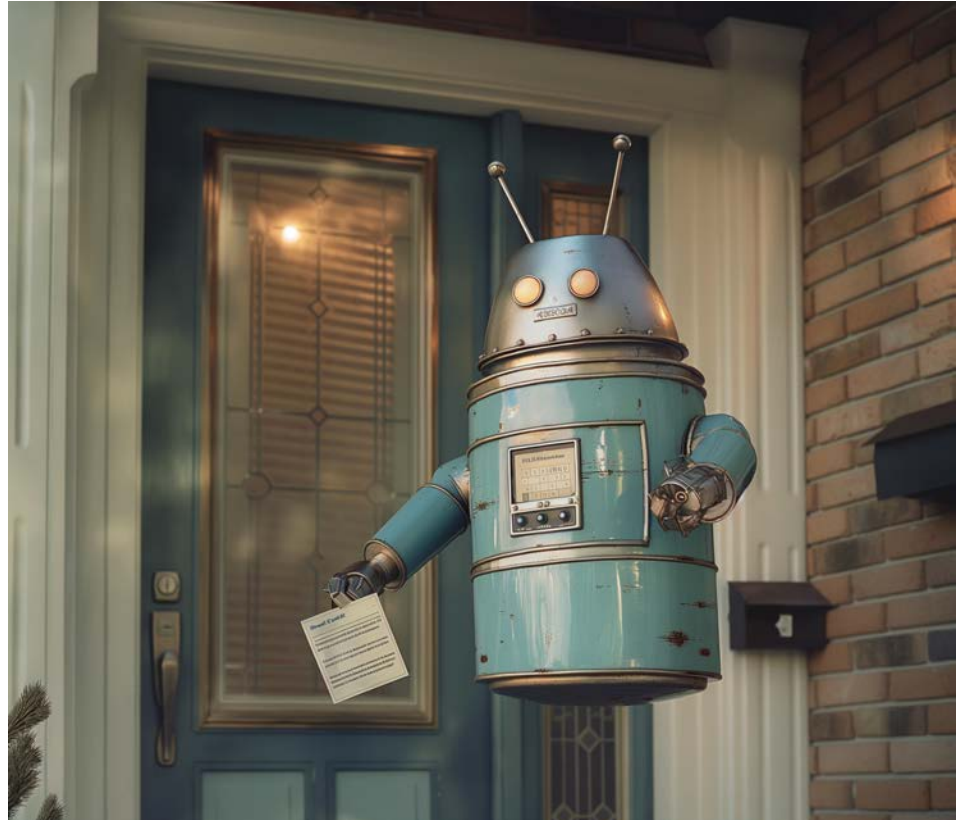
Scalability for Growing Businesses:

As a Process Serving firm grows, Case Management Software Systems can scale with them including the ability for electronic filing (eFile), server pay, client payment remittance, work exchange,

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collaboration, and eSignatures. New features are constantly becoming available. Implementing a Case Management Software System can provide the necessary tools to increase workload while maintaining efficiency and quality for businesses of all sizes.

In conclusion, using Case Management Software Systems offers numerous benefits, including increased efficiency, improved communication, and better record-keeping while adhering to legal standards and compliance. By streamlining administrative tasks and providing essential tools for Process Servers, a Case Management Software System will enhance productivity and contribute to a smooth operation of legal proceedings while building trust and transparency between the Process Server and the client. As the process serving industry continues to evolve, adopting a Case Management Software System will become increasingly important for success while helping you remain at the forefront of industry standards. 🌐

A banner for the CALSPro 56th Annual Conference. On the left, the CALSPro logo features a white outline of California next to the text "CALSPro" in a large, white, serif font, with "California Association of Legal Support Professionals" in a smaller font below it. To the right, the text "56TH Annual Conference" is in a large, white, serif font, followed by "September 27-29, 2024" and "Hilton Sacramento Arden West" in a slightly smaller white serif font. Below the text is a computer monitor displaying a wireframe of the California State Capitol building in green. The monitor sits on a desk with a keyboard, mouse, and a pen holder. To the right of the monitor is a white vase with dried branches.

The Importance of Social Media Marketing for Legal Support Companies



ESTEBAN PUJOL
CALSPro Advertising Chair



In today's digital age, social media marketing is a critical component of a successful business strategy, including for legal support companies. Leveraging social media platforms such as LinkedIn, Facebook, Twitter, and Instagram can provide numerous benefits that enhance visibility, build brand credibility, and drive business growth.

Enhancing Visibility and Reach

Legal support companies often operate in a competitive market where standing out is essential. Social media platforms offer unparalleled opportunities to increase visibility and reach a broader audience. By maintaining an active presence and sharing informative, engaging content, legal support firms can attract potential clients who might not be reached through traditional marketing channels. This increased visibility can lead to more inquiries, referrals, and ultimately, new business.

Building Brand Credibility and Trust

Credibility is crucial in the legal industry, where trust and professionalism are paramount. Social media marketing allows legal support companies to showcase their expertise and establish themselves as thought leaders. By sharing valuable content such as case studies, industry insights, client testimonials, and updates on legal trends, firms can demonstrate their knowledge and reliability. Regular engagement with followers, responding

to comments, and participating in relevant discussions further solidifies the company's reputation as a trusted partner in the legal field.

Engaging with the Community

Social media provides a platform for direct interaction with clients, prospects, and the broader legal community. This engagement is vital for building and nurturing relationships. Legal support companies can use social media to answer questions, provide updates, and share success stories, creating a more personal connection with their audience. This interaction helps humanize the brand, making it more relatable and approachable, which can be particularly beneficial in an industry that often feels impersonal.

Targeted Advertising and Lead Generation

One of the most powerful aspects of social media marketing is the ability to run targeted advertising campaigns. Platforms like Facebook and LinkedIn offer sophisticated targeting options that allow legal support companies to reach specific demographics, such as law firms, legal professionals, or businesses in need of litigation support. These targeted ads ensure that marketing efforts are directed towards the most relevant audience, maximizing the return on investment. Additionally, social media can drive qualified leads by attracting users who are actively seeking legal support services.

Cost-Effective Marketing

Compared to traditional advertising methods, social media marketing is often more cost-effective. Creating and maintaining social media profiles is generally free, and even paid advertising on these platforms tends to be more affordable than print, TV, or radio ads. This cost efficiency allows legal support companies to allocate their marketing budgets more effectively, ensuring that resources are used in the most impactful way.

Staying Ahead of Competitors

Finally, maintaining an active social media presence allows legal support companies to stay ahead of their competitors. By regularly posting content and engaging with followers, firms can keep their brand top-of-mind for potential clients. Monitoring competitors' social media activity also provides valuable insights into their strategies and helps identify opportunities for differentiation.

In summary, social media marketing is indispensable for legal support companies aiming to enhance their visibility, build credibility, engage with the community, and generate leads in a cost-effective manner. By strategically leveraging social media platforms, legal support firms can not only reach a wider audience but also establish themselves as trusted and authoritative partners in the legal industry. ●



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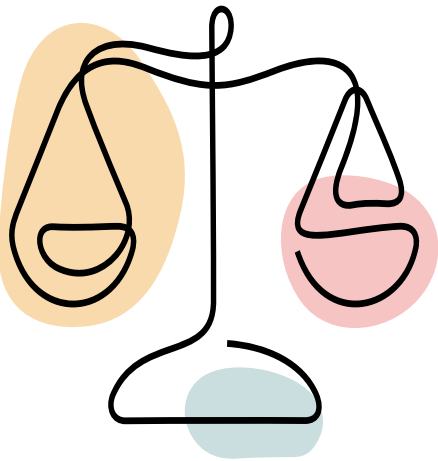
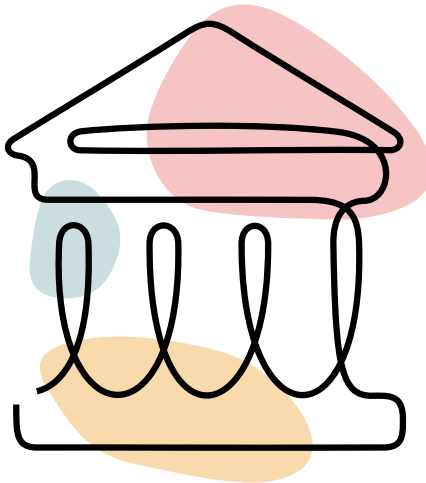
President's Message

– continued from page 1

creative, and by popular vote passed a new bylaw amendment changing the structure of our active membership category to allow for different pricing categories and entry points. Since the change went into effect this year, we have had over 25 new members and continue to grow at a gradual pace. Our membership is currently at 90% of our targeted goal but we still have a few months to go and are asking for your help in finding support from more companies and stakeholders.

The transition is also happening at individual and company levels with newer generations of entrepreneurs expanding their presence and influence into our industry. Some are relatively new to the business but are very tech forward, while others have just entered to supplement their gig economy businesses (but are also savvy at utilizing technology and applications). There is a new generational cast rising through the ranks and taking control of established enterprises, looking at the myriad of changes and challenges as opportunities for growth. Regardless of the circumstances, one thing that is for sure is that many leaders have differing views on the industry's vicissitudes and uses of technology for system adaptation, so there will inevitably be ebbs and flows in the way we approach and conduct business.

This is why getting involved with CALSPro, supporting the association, and attending conferences are so important. CALSPro not only offers our industry the legal protections we need to fight adverse legislation and educate our members on changing rules and codes, but also provides a forum for its leaders, members, employees, and all to come together to discuss legal changes, paradigm shifts, challenges, and common goals to have alignment across the differing factions and generational perspectives. We cherish the successes of the past and the enlightening guidance of our predecessors, but we must also be trailblazers and forge ahead as open minded, forward thinking, and ready for what lies ahead in a changing world. ●



Legislative Update

– continued from page 3

a licensed attorney. These changes still accomplish our goal to break up the monopoly that exists in Los Angeles County and allow for work to be spread to other counties within the state.

We also faced an attack on the assumption of facts that exist when a registered process server signs a proof of service under penalty of perjury. Assembly Bill 2347 was sponsored by legal aid consumer organizations. They allege that tenants and their attorneys often have insufficient information to determine their deadline for filing a responsive pleading in unlawful detainer actions. They allege this based upon (1) tenants are not properly served due to sewer service (although they seem to acknowledge that this is the exception not the rule in California), and (2) even in cases of proper service, tenants are unreliable narrators of when and how that service occurred, and that in the absence of having a proof of service filed prior to the landlord seeking entry of default, they have no way to accurately calculate their responsive pleadings deadline. The bill also would amend Evidence Code 647 and remove the assumption of facts that are provided when a proof of service is signed by a registered process server. It also would require the proof of service of the summons and complaint to be filed promptly with the clerk and a copy mailed to the defendant. Our advocates spoke with the author on our behalf about our concerns with the bill's wording. On April 22nd, the bill was amended by the author and our issues removed. Thus, preserving the assumption of facts and the presumption of truth on a registered process server signed proof of service.

Our advocates and the committee have worked hard to promote and protect our profession this year. I am truly blessed to have the opportunity to work with such talented and driven people. Rest assured we will continue to fight for CALSPro and its membership, to keep our profession prospering into the future. ●





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