

## Process Server Business Plan



# How To Become A Process Server

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## **Process Server Business Plan. How To Become a Process Server**

The principal job of a process server is to “serve” or deliver legal documents to a defendant or a person involved in a court case. Service of due process is a privilege provided by the United States constitution, where all citizens have the right to be informed of being summoned.

Process servers were initially intended to serve as a messenger system to notify individuals of their constitutional right to the due process of the law, ideally by providing them with information regarding the legal issue that specifically involves. Originally, the local county sheriff would typically serve legal papers to the respective individuals. However, as cities grew, it became challenging for local sheriffs to serve or give out court papers to the respective subjects, considering that they were also required to attend to other legal situations in their jurisdiction simultaneously. This created a great need to have specific individuals who could disperse these papers professionally and timely, which led to the formation of process servers.

If you want to become a process server, there are certain things you want to know and consider, so that you know exactly what you’ll need to become one. For starters, you need to take your time to learn how a process server spends a typical work day, so that you can be sure it’s the perfect job for you. A process server will mostly spend their workday giving out legal papers or serving people with papers they want or need. As such, it’s important to learn ways in which you can make the most out of being a process server, so that it’ll be easier to come to terms with the job requirements. If you’re really passionate about it, being a process server is an easy job.

If you are new to the industry, you should consider getting a job in the legal field, like a notary. This will give you some extra income as you learn a little bit about the legal system and how it works. You can also take a class, or simply familiarize yourself with legal papers and subpoenas and how they relate with the people who get them. You can easily get enough information about this online or in the field.

Once you get a feel of the legal system and what it means to be a process server, you may want to consider working for someone who already is, or finding a mentor. Working for a process server is the best way to start your journey as a server in your own right. While you won’t make as much money right away, the information you will get along with the practice will be invaluable later on in your career. You will essentially get first hand experience on things like how to get the papers, how to find clients, and where to go from there. With a good grasp of these, you will be able to branch out on your own.

Unfortunately, not everyone will be able to kickstart their career by working for a process server or as a notary. Plus, some “mentors” can be too demanding, which may even discourage people from getting started in the industry.

This book should help guide you on all the steps you need to take to become a process server and start your own business. Fortunately for you, modern technology makes it

easier than ever to start a process server business. In fact, you only need access to the internet and perhaps a stack of business cards to get started.

Here's what you'll learn:

- The business requirements and considerations of process serving: Here, we'll cover everything from the very basics of process serving to advanced concepts such as legal requirements and ethical considerations.
- Market Analysis: Once you're comfortable with the basics, what the clients expect of you as a process server, along with how to identify opportunities and outdo your competition.
- Organizing and managing your business: From there, we'll look at what you need to set up a business professionally to inspire confidence in your clients.
- Marketing strategies: Later on, the book will discuss everything you need to know about marketing your business, including how to find your first client.

But let's start from the beginning.

## **CHAPTER ONE: PROCESS SERVING REQUIREMENTS AND CONSIDERATIONS**

The United States is such a great country. There is a system of law designed to ensure that each citizen's rights are upheld. A process server is part of this system. In any legal action, the defendant has the legal right of being notified of the charges against him or her. It's the work of a process server to ensure that this right is upheld.

As such, while process servers work for and are paid by the plaintiff in the respective case, they are ideally protecting the defendant's rights. That's why it's important to remain an impartial party as a server, with no interests in the cases, and why process servers must conduct themselves with a high level of integrity. There's a general misconception about process servers that they are the bad guys. However, in reality, process servers work on the side of justice. In fact, the whole legal system would fall apart without them.

### **What a Process Server Does**

Although there's a certain level of mystery that surrounds process servers and what they do, their work is pretty simple. A client makes a call to a server when they need papers served to another person. The server either picks the paper up physically from the client, or they receive them via email, fax, or other electronic means. The task is to find the person as requested by the client and serve them with the papers.

This procedure is done based on the rules of civil procedure in every state or the U.S. territory. When the papers are served to the defendant, the process server will then complete a "return or service", which is also referred to as an affidavit of service or proof of service. Its purpose is to affirm that the papers have been served successfully to the defendant. The server then delivers the return of service to the client, or files the document with the court where the case was originally filed on behalf of the client. The last step is where the client pays the process server for their work.

All this sounds quite simple, right? Well, it is. As a process server, you will have a remarkable amount of flexibility with how you make your serves and run your business, so long as you adhere to the rules of civil procedure as defined by your state. However, things aren't always as simple as they seem. For instance, you may find a defendant isn't home, is deliberately avoiding being served, or no longer lives at the same address.

This means that part of your job may involve spending a lot of your time waiting around or driving to different locations, and sometimes even resorting to engaging your creativity in order to make a serve, as explained in later sections of the book.

### **Legal Requirements for Becoming a Process Server**

In the U.S., anyone over the age of 18 (or 21 for some states) can legally serve legal process, so long as they are not party to the case. It's also important to note that most

states don't license process servers. As such, you can get started as a process server without having to jump through many hoops, and you may easily jump right into finding clients and promoting your business.

For those who live in states that regulate or license process servers, don't fret. In most cases, the requirements are super simple and if you meet them, you could be serving papers in no time. For instance, California law requires that process servers who do more than 10 serves in a year to register. To qualify, the person has to pass a background check (have zero felony convictions) and post a bond of \$2,000.

The \$2,000 might seem like a lot of money, but you have the option of purchasing a California process server bond for about \$50 to \$100 online. Be sure to check with your state's requirement for process servers to learn more. Keep in mind that each state's legal requirements are bound to change anytime, and it's always recommended to check with your local jurisdiction or state for the latest requirements.

While at it, consider doing an online search for your state's rules of civil procedure. These will feature the basic guidelines that every process server in your state is supposed to follow, along with stipulations on who can serve papers, exactly how the papers should be served, and how servers can file proof of service with the court.

Consider printing the section on process service as you will most likely have to refer to it later on in your career, especially when starting out and are still learning the ropes. At the very least, ensure that you're well familiarized with the basics.

### Process Server Training Basics

Considering this is one legal field that handles a critical process, it may come as a surprise that there's no unified or nationwide training requirements for process serving professionals. Unlike professions such as electricians, plumbing, and even barbers, process servers usually don't require a formal course of study.

Most process servers enter the industry informally, basically by learning on the job, or with the help of a mentor. In fact, you should expect to figure out most of the things about the industry as you go. It does make sense because from a legal standpoint, serving papers is a relatively simple and straightforward job.

Of course, there are challenges in the field, and as a process server, you will be expected to resort to some creative means to solve them. However, so long as you're abiding by the rules of civil procedure as outlined in your state, you can enjoy a great level of flexibility in terms of how you can work. With this in mind, you should note that there are some specific situations where you can find process server training being offered.

**State Mandated Training:** There's a small number of states such as Florida and Texas that require a formal process server training before certification and licensing. Classes

here are conducted by the county's sheriff office or by the court. In a few other states, classes are provided by a private organization, such as the local process server organization or online. Just make sure the training program you choose meets the requirements of your state.

**Private Process Server Training:** For the states that don't require formal process server training, you can take a private course to not only learn the basics, but also network with other process servers. Many Process Server Associations will provide introductory training and certification several times a year.

**Job Provided Process Server Training:** Before sending out new hires out into the field, most process agencies will provide an orientation class. It includes basic stuff like how to do a court filing, complete a return of service, and professional ethics. Please note that some of them will charge a fee for the orientation class.

All in all, the best training for process servers is experience. While it's tempting for you to wait for the next training opportunity, don't use it as an excuse to avoid getting real-world experience. Once you've served five to 10 cases, the work will seem much easier.

Start by studying the rules of civil procedure (of course those related to service of process), and handle a few simple cases. You will grow your confidence as you advance towards more difficult serves.

## Considerations when Becoming a Personal Server

### Job vs. Self-Employment

Before we get into details about starting a process server, there are a few considerations you need to have in mind. For starters, you have to decide the kind of process server you want to become.

Generally speaking, there are two main kinds of process servers: those who work under someone else, either as an employee or an independent contractor, and those who own their own business. Most process servers work as independent contractors for existing agencies. You will often see such positions advertised on Craigslist, job boards, or even in the local papers. The requirements here are often low, and it's usually rather easy to get started.

The main benefit of working under an agency is that they will supply the work. You don't have to worry about finding clients and running a business. This can therefore be a great way to experience the in and outs of the industry before pursuing self-employment. However, you should know that the pay is often low, paying at around \$15 per serve, meaning you need to serve a lot of papers every day to make a living. Keep in mind that just as with any other job, much of the revenue will be kept by the owner, who will only pay you a mere fraction of their revenue. As if that's not enough, you will:

- Be classified as an independent contractor, meaning you will have to withhold and file your own taxes. This means that you will be in business for yourself and making a small mistake could mean owing the taxman a lot of money come year end.
- Lack the security of a conventional job. In case the agency you're working for loses clients and there's no revenue, your income will most likely take a hit.
- Not enjoy crucial benefits, meaning you will have to get your own health insurance and not have paid sick days or vacations.
- Have to provide for your own transportation (repairs and fuel) and smartphone.

The alternative here is self-employment. Fortunately, it's much easier than you'd think to start your own process serving business. Although you will be responsible for covering all your expenses and withholding your own taxes, you will get to keep 100% of all the fees you charge, and you have the potential to make a lot of money with considerably less work.

Consider this as an example. When working for an agency who pays you \$15 per serve, you need to serve at least 13 papers to make \$200 a day. Remember that it often takes more than one attempt to make a successful serve, which translates to a lot of fuel and time spent driving around.

On the other hand, when working for yourself, you could be billing your clients around \$50 per serve. Therefore, you will only need to serve 4 papers a day to make the same amount of money. You could actually work part-time while keeping your day job, especially when starting out, and still make more money than most employed process servers do in a day.

The choice here is quite obvious, however, as the saying goes, with great power comes great responsibility. Plus, self-employment won't be ideal for everyone. Some people could be easily overwhelmed by the thought of having to promote a business and finding clients. For them, working for someone is probably a better choice. But if you crave the freedom of working for yourself, starting your own process server business is well worth the effort.

## Personal Service vs. Substituted Service

### Personal Service

Personal service is when a process server physically hands out papers to the defendant, and it is simply what most people imagine whenever they think of a process server. However, you won't always be serving an individual. You will often find yourself serving a government agency, a business, corporation, or even your state's attorney general. This still falls under the category of personal service.



When serving businesses or companies, you will either be serving a corporate officer, a manager, or other responsible parties. Depending on the state you're operating in, you may even be allowed to serve a security officer or the receptionist in the lobby if you're reasonably certain that the person will pass along the papers to the intended party.

But what about businesses that don't have a regular office? Well in such a case, you will have to serve their registered agent. A registered agent refers to a party or entity that agrees to receive the service of process papers on behalf of the business or company, which will often maintain a physical address where papers can be served. You can find the registered agent of a business by checking with your secretary of state's office, or the government agency that registers businesses in your state. Serving government agencies is usually much easier as they maintain regular office hours and will often have employees on site that will be responsible for receiving the papers.

There are a few things you need to keep in mind when making a personal service:

- Identify your subject by looking them up on social media or online to get a clear picture before you attempt making a service. Alternatively, you can simply state their name and wait for them to respond.
- Contrary to what the movies tend to portray, you don't approach the subject and say, "You've been served!" This is just unnecessary and may cause the subject to get agitated. It's enough to just let them know you have some important legal documents to give them.
- In case they refuse to accept the papers (refusal of service), it's okay to leave the papers on their doorstep or at their feet, so long as you've properly identified them. Their refusal doesn't mean it's not a valid serve. More on this later.

### Substituted Service

This is quite a tricky area, and you will want to confirm with your state's individual rules on what qualifies as a valid serve. In general, substituted service refers to situations when you don't serve the party named as the defendant, and instead serve someone else on their behalf. This could be another adult that resides at their address, such as a roommate, spouse, parent, or a child as young as 13.

A substituted service could also occur when you serve papers by other means other than physically, such as through certified mail, email, newspaper publication, or by social media. Your state will have specific guidelines for conducting a substituted service, but when it comes to defendants who are repeatedly avoiding service or just can't be located, the judge in the case may decide on a suitable form of substituted service to attempt.

In such difficult cases, it's important to consult with the client with regards to the steps you've taken to complete the service and the extra options that might be available.

## Handling Return of Service

Return of service, which is also referred to as an affidavit of service or proof of service is the document a process server returns to the client to certify that the service of process has been made. It's usually a simple form that has a case number and court of jurisdiction, the name and address of the defendant, and a section for the process server to complete and sign.

It's very important to complete the return of service as accurately as possible because the document will be filed with the court and become a permanent record of the case. Falsifying a return of service is highly unethical, not to mention it could result in severe civil or criminal charges against you. It also damages the reputation of the process server profession as a whole.

Keep in mind that most jurisdictions will have the service forms in civil cases notarized, which makes them legal affidavits. Falsifying an affidavit knowingly is generally considered perjury, and is treated as such by the courts.

When starting out, consider creating a rapport with a notary as you will be using their services a lot. Some process servers usually charge the client an extra fee for notarization, while others build the expense into the standard fee to keep things a bit simpler for the client.

In most cases, the return of service will be supplied by the client. For law firms, they almost always provide this form to the process server, with the relevant information such as case number filled in. Moreover, legal document preparation services as well as self-help kits, like those used in divorce cases by clients who can't afford an attorney, usually also provide a return of service form. If your client doesn't provide a return of service form, you can use a generic one and add the important details.

Alternatively, you can use a free affidavit for a service generator, which you can find by quickly searching online. You only need to fill in the case details and the generator will create a form you can print, sign, and then send to the client. Although the return of service form will eventually become part of the public court record, it's your duty to protect the confidentiality of your clients as a process server.

## Court Filings

Based on the needs of your client, you will either have to return a completed proof of service to them, or file it for them. Most law firms will do their own filings, and so will most private individuals who hire a process server. However, some will choose to have you file the return of service form on their behalf. This should ideally be taken as an extra service, which you should bill as an additional fee.

Court filing may sound rather complicated, but it's usually a simple process. The traditional way is visiting the clerk's office at the courthouse in which the case is filed and let them know that you need to file an affidavit or return of service form. They will know exactly what to do. Just make sure that you get a receipt for your client's record.

Keep in mind that the clerks you'll find in the courthouse are quite essential to the process serving business, and you want to build a rapport with them. They will know a lot about the ins and outs of these kinds of procedures, and if you ever get stuck figuring out where to file or how to complete a return of service, they will be better placed at pointing you in the right direction.

Just as with everything else these days, many courts have adopted electronic filing in their system. With this, you can use a cheap, portable scanner to file an electronic copy of the return of service form, and send a copy to your client along with the filing receipt. When working with such courts, there's usually no need to drive to the courthouse or the client's office, which ends up saving you a lot of time and gas.

Unfortunately, there's yet to be a universal system for electronic filing. This means that each court will have its own procedures and requirements for electronic filing. So, be sure to check with the courts in your area and familiarize yourself with their filing requirements. You can find the information you need on their websites.

## Skip Tracing

This is something that always gets process servers excited. People are sometimes hard to find. Sometimes, they will go to great lengths to avoid being found by not only process servers, but also law enforcement, bill collectors, and any other persons or entities looking for them. The science and art of tracking such people down is called skip tracing.

If you can learn the essentials of skip tracing, it's a great additional service that you can offer your clients for those hard-to-find or hard-to-solve cases. Process servers who do skip tracing can bill an extra \$30 to \$50 per hour or more for the service. As such, it's worth getting some skip tracing skills and offering the service.

Fortunately for you, social media has become so entrenched into the daily lives of most people, making it the go-to resource for private investigators and process servers when they need to locate people. It's remarkable what people will put up on the internet, and how easy it has become to locate problematic subjects.

Aside from social media, you have other digital resources to rely on when in pursuit of elusive subjects. One of these is [pipl.com](http://pipl.com), which is a web engine designed to combine public records with professional sites, social networks, phone directories, lifestyle sites, and marketing lists to find a complete profile of an individual. All you need is one data

point, such as an email address or a name, and you will be surprised at what Pipl will find.

It gives you a complete list of business contacts, social media profiles, work history, previous addresses, and known relatives. While it might not always help you get your subject immediately, having such lists will give you a head start for some good old-fashioned skip tracing.

One of the best places for process servers to check when a defendant is being elusive is usually their mother's place. When people get into trouble and are desperate, they always tend to run home to their mother. If they are not there, their mother usually knows where they are staying.

Another technique for problem subjects is to find out where they work. Serving subjects at their workplaces has its advantages. Unlike serving at a residential house, where the subject may very well have access to a weapon, it's rare for people to take a weapon with them to work. Moreover, the social pressure and wish to keep a positive relationship with the employer might also help keep the anger and attitude of the subject in check. This makes your serving much easier.

## Personal Safety

Generally speaking, process serving is a safe profession. It actually doesn't even make it anywhere near the list of the most dangerous occupations. Still, you're at a higher risk for personal injury and assault as a firefighter, nurse, and a convenience store clerk. The biggest risk factor for process servers is by far the sheer amount of time spent driving around. Ensuring that you have a safe means of transportation goes a long way.

However, you still can and should expect to come across individuals who are distressed or agitated. For such cases, it's worth taking a few personal precautions to enhance your personal safety. For starters, if you have any gut-feeling or hesitations about the history of a subject you are serving, don't shy away from running a simple background check. Most arrest histories and court records will come up in a simple Google search. You can also check your state's courts and correctional facilities.

If you do confirm the subject has a violent past, consider bringing a friend or two along for extra support. They can wait in the car to see what happens when you serve the papers, and will be able to quickly call for help in case there's a problem. You can also request a civil standby from your local law enforcement in case the subject has a very disturbing history of violence.

As a rule of thumb, never argue or engage in a shouting match with an agitated or aggressive person. Your only purpose there is to serve papers and get paid for it; not to prove how tough you are. Always be the better human being by staying professional, completing your serve, and leaving quickly.

It's also wise to avoid looking or acting as a law enforcement officer. In most states, so long as you are not impersonating a police officer and there are no local laws prohibiting the use of badges, then the process server can regularly wear a badge. However, think of it this way, if you were a defendant who was trying to avoid service, would you let anyone wearing a badge into your home? Of course no.

In the wrong neighborhood or circumstances, wearing a badge could bring a lot of negative and unwanted attention, and the neighbors could actually alert the defendant of your approach. It's simply much easier to just approach the subject without an authority demeanor, a badge, or any of the usual signs of law enforcement.

With this in mind, it's important to point out that there are some situations where wearing a badge can make things much easier, such as when you're serving a government agency or a corporate office. Plus, in the rare event a situation escalates and police come to the scene, a badge could help identify your position.

### Difficult Serves

Every now and then, you will encounter a defendant who is willing to do everything in their power to avoid service. You may have located their residence, but they simply avoid coming to the door and keep the blinds drawn tight throughout the day. As a process server, you will often come across such situations, and you need to flex some muscle to overcome the challenge and complete those difficult serves.

Keep in mind that this is your business, and you have enough flexibility when it comes to making your serves. You only need to stick to the rules of civil procedure and avoid breaking any laws. Don't be afraid to put on a brown polo shirt to look like a delivery guy, or go out of your way to catch someone on their way to buy groceries. Improvise!

When serving a subject gets difficult, and you're forced to resort to some creative and/or time-consuming measures, always check with your client for approval before you bill them for stakeouts and surveillance. Most clients will be happy to pay, especially if they've run out of luck with other process servers. However, some would rather go back to the judge to try out alternative options like surveillance by publication or mail.

### Ethics for Process Servers

Ethics are critical to the process serving industry, especially with the clients you are working with. You should always conduct yourself with the highest levels of professionalism.

One of the key problems in the process server business today is something called sewer service. It's when a process server claims to have served papers to the defendant, when in actual fact they haven't, just to receive pay for work they didn't do. It often happens like this – a process server is under contract with a large agency and

they figure out quickly that they won't make as much money when receiving \$15 per serve.

Instead of doing what they are supposed to do, they just slide papers under doors or leave them on front porches without confirming whether the defendant still lives in the address. They then proceed to sign the proof of service, return everything to their boss, and then go back home celebrating how clever they are.

Later on, a defendant or two ends up contesting the service in court, and the case is delayed or thrown out. Pretty soon, the “clever” process server finds themselves getting served because they have cost their clients a lot of resources and time. They could actually be charged with criminal charges because falsifying an affidavit or service is perjury, and therefore subject to criminal penalties.

Although the majority of process servers are honest and meticulous people, stories like this will crop up from time to time, which ends up damaging the reputation of the industry. If you want examples of such stories, all you need to do is search “process server sewer service” online, and you’ll find dozens of news worthy stories.

Don’t forget that whenever you sign your name on a proof of service, you are in effect certifying to the court that you made the service in accordance with the law, and your signature becomes a permanent case record. It might seem easy to cut corners when doing your job, but it’s usually not worth it, considering you will be risking losing your business, not to mention criminal charges and/or a civil suit.

You might be wondering what you should do if you’re not sure about a serve. You might have seen the subject through a window and just slid the papers under the door after they successfully avoided your several attempts. Or, you may be uncertain whether the roommate you served will actually pass on the papers. What happens in such a situation?

Well, as a process server, you should always rely on the legal principle of “reasonable standards”. This is the same legal principle applied to a wide variety of cases, from medical malpractice to justified self-defense. Simply put, would a reasonable person in the same situation see it as a proper service? Would you explain why you considered the serve valid in a way any reasonable person would understand?

If that’s the case, you can sign your name on the proof of service and then proceed to file it with the court. Otherwise, reconsider your options for conducting a proper serve. It’s worth the peace of mind to do things the right way and avoid taking shortcuts with your source of livelihood.

## CHAPTER 2: SETTING UP YOUR PROCESS SERVER BUSINESS

Starting a process serving business is pretty cheap. All you really need is a phone, a stack of business cards, and reliable transportation. However, as discussed in this chapter, it's important to set up your business as an LLC (limited liability corporation), and have a website for marketing purposes.

### Licensing Requirements

It's important to go through the local business licensing requirements in your locality or state. In most of the cases, you don't need to have a local business license when conducting a business from your home, though there are some municipalities that will require even home-based businesses to register. Your county or city website should have the updated requirements.

### Legal Structure

When getting into any business, you will need some form of a legal structure. A proper legal structure will ensure that you are not only compliant with the law, but also lets you open a business bank account, and even accept payments in your business name. Most independent process servers usually operate as sole proprietors or as LLCs.

Being a sole proprietor means that you are essentially conducting business under a separate trade name, but you will ultimately be the owner solely responsible for all the financial obligations of the business, including whatever debts that your business could take on. This means that if your default on a debt, your creditors are legally allowed to come after both your business and personal accounts/assets.

Nonetheless, the tiny amount of startup expenses and overhead required in sole proprietorship means most process servers will not accrue debt to start their business, and the simple requirements and low fees make it an attractive option for beginners.

On the other hand, LLCs are the next step above sole proprietorship. They ideally help to limit your personal liability in the event that your business takes on debt. Just as with sole proprietorship, LLC can be filed online, though they may attract additional annual reporting and filing requirements. You also have the option to be taxed as an individual, typically by reporting your expenses and profits on your personal tax return. Alternatively, the LLC may choose to be taxed as a corporation.

In general, LLCs are perfect if you think your business could be exposed to debts or lawsuits. There's always the risk when it comes to serving individuals, which is evidenced by the high number of process server assault cases. LLCs can be created by just one owner, meaning you aren't required to have a partner.

### How To Register a Process Server LLC

If you've decided a limited liability corporation is the right option for you, you'll be glad to know that it's relatively easy to form an LLC. Here are the steps you need to make:

### Find a name for your business

Choosing a business name might seem kind of trivial, but it can be an important component to your business success. The name you choose should ideally reflect your company's values and the services you provide. As such, it's crucial to take your time to assess all aspects of your choice. There are a few factors you want to take into consideration when naming a business, from making sure the name isn't trademarked or copyrighted, to using industry-related themes and wording.

### Have a Business Plan

While it's not a legal requirement, having a business plan will make sure you're on the right path to success. It will ideally define your goals, mission, and allow for a robust understanding of the industry and your competition. It will also define your plans for future growth.

Now that you're reading this book, you're certainly on the right path.

### Designate a Registered Agent

This is the person who will receive formal communications from the office of the Secretary of State. A registered agent will also be the person who accepts service in the event that your business is sued. You should include this person in the paperwork, and it's best to know who this person will be in advance.

### Create an Operating Agreement

This is a document meant to work out the financial arrangement between you and your partners. You should also file the articles of organization, which forms the paperwork needed to create your LLC formally. You will most likely have to part with a fee to file the paperwork. Plus, some states will let you file the paperwork electronically, while others will require you to file them physically.

### Get Your Business License

You may need to register your business name with the county, city, state, and/or federal authorities. Be sure to file any required professional licenses. Some states will require you to have a civil process serving license.

### Publish a Notice When Necessary

Some states will require you to publish a legal notice proclaiming the formation of your LLC. In some cases, this could be done within a certain time period after filing your LLC



paperwork. Check your state's website to ensure you are compliant with the rules and guidelines in place.

## Tips for Choosing the Perfect name for your Business

### 1. Review the names of process serving agencies/companies

What names do other process serving businesses or companies in your area use? You wouldn't want the clients and business you've earned to confuse you with another company though. Make sure that your name stands out from the rest.

### 2. Make it some simple and memorable

Having a memorable name will make sure that returning customers can easily remember your business and find you easily whenever they need your services again. In case your name blends in with the rest, clients may forget which company they used originally.

Moreover, you want your company listing to appear first whenever people search your exact business name. In case other companies appear first whenever you search for your company name, it could be confusing for the clients who already know your name looking to find you. Ensure that there will be no doubt they have found who they're searching for.

### 3. Use working that hints your location or industry

It can be very beneficial for you if you can hint at you being a process serving company, or at least legal services. It would also be great to make note of your area if your business targets a specific location. Prospects looking for process serving services in your area won't have to look far to find you. As a rule of thumb, avoid using generic terms like "Legal" or "Nationwide" process servers. It will make it unnecessarily difficult for clients to find you, not to mention the words could mean different things depending on the context.

### 4. Research available domain names

Digital marketing is increasingly becoming important for finding new and repeat customers. Your website (and its domain) is essentially the face of your online presence. As such, it's crucial to ensure that your company name works well online. Ensure there are relevant domain names available for your chosen name, and that there are few or no other companies in your industry with a similar name.

## Get a Professional Contact Details

### Phone Number

Aside from setting up the LLC, the overhead when it comes to creating a process server business is minimal. You don't even have to start with a fancy office, retail space, a receptionist, or expensive equipment, all of which could bury you in debt before your business gets traction. You can actually run this business from your smartphone.

Nevertheless, it's recommended that you set up a professional office number for your business, which would essentially forward the calls to your personal cell when necessary. This way, if you want to share the call load with your partner or switch numbers, you will have a dedicated number to give your clients.

Plus, instead of having to list your personal number on your website or business cards, you can just list your business number to maintain a level of privacy. Fortunately, modern technology allows you to get a dedicated number free of charge, from services such as Google Voice. When you want to take a day off, you can have Google Voice take a voicemail and text or email you a transcript of the message.

## Fax

In today's standards, you may think fax machines are dead. For some reason, the legal industry still loves them, and you will occasionally come across an old-school guy who still wants to fax you some paperwork. In case you can't convince them to send you the paperwork as an email attachment, you can send or receive a limited number of faxes from your smartphone or desktop through FaxBurner, a free fax service.

The drawback is that you won't have a permanent fax number, meaning that if you will be sending and receiving faxes regularly, you need to upgrade to their premium subscription. This will cost you around \$12.95 a month, it will be a lot cheaper compared to getting a clunky fax machine with a dedicated phone line.

## Custom Email Address

It's strongly recommended that you create a custom email address for your business. A custom email address that has your domain name will add a professional touch, and is essential when communicating with clients. To get a custom email address, you will first have to register a domain name for your business ([www.example.com](http://www.example.com)).

Alternatively, you could pay Google or other premium services about \$5 to \$10 a month to get a customized email address. However, this is not ideal as you can easily have a custom email once you set up your website, as discussed in later sections.

## CHAPTER 3: PROCESS SERVER BUSINESS OPERATIONS

You will not really be running a process serving business until you serve your first client. And of course, you can't serve your first papers without a client. In case you're spending too much time on the details and not finding enough clients, your business will go nowhere.

The main clients of process servers can be categorized into two:

- **Private individuals:** These usually hire private servers when they need one for a case. They are often divorce cases or small claims cases, and the client will most likely be working with a no-frills attorney or a self-help document preparation service. When it's time for their papers to be served, they go looking for a process server. While these will make great clients, they are rarely repeat customers.
- **Landlords, Attorneys, and Corporations:** These entities tend to file legal actions regularly, such as evictions and lawsuits. They make the bread and butter of the process serving business, and if you can form a good rapport with them, they will generally tend to generate a lot of repeat business.

With this in mind, there's basically two ways to find clients for your process server business:

Seek new clients proactively by calling or visiting self-help legal centers, law firms, rental agencies, mortgage lenders, and other places that might require the services of a good process server. It's recommended that you make the visits in person, ideally with business cards or a good process server marketing letter at hand.

Build a website. This is especially ideal if you hate the idea of selling or visiting law firms and other offices in person to make pitches. More on how to build a website to market your business later.

### What Clients Really Want

Unfortunately, there are lots of really bad process servers out there, who at best, fail to follow up and bounce from client to client. At their worst, they act like tough guys and get a kick out of banging on people's doors. These are the cliché process servers.

Attorneys really hate these types. Why? Well, they are a liability. And, nobody really wants liability. Imagine spending weeks or months' worth of effort and needing to hand over papers to a process server. Your hard work rests on the server's ability to do their job. In such a case, would you go looking for a wannabe tough guy, or someone who's reliable and smart, who can be trusted to serve your case with integrity and ethics?

The choice is obvious. Fortunately, the incompetent process servers create opportunity for new entrants in the industry. If you inspire confidence in your clients and act intelligently, they will come to you every time they need your service. However, don't assume that all process servers in the industry are incompetent.

In fact, you should know that the industry is full of honest, diligent, and hardworking people who show up and give their best every day. Would you be able to compete in such a market? Well, a great way to differentiate yourself from the competition is charging higher prices. Resist the urge to set rates that are too low, just because you're new to the industry.

In most cases, law firms won't even pay for the process server out-of-pocket. The expense is passed along to the client, and they may even charge more than what the process server bills, essentially making a profit from the difference. Lawyers usually don't care what servers charge per serve. Their main concern is making sure they get a professional and reliable server who can serve in a timely manner.

If your prices are too low, it may send out an amateurish and needy image to them, which could be a red flag in their eye. Above-average rates will help inspire confidence in your clients. You will also attract better clients who appreciate your personal attention and time. However, it goes beyond the client.

If you want to make about \$200 a day at around \$35 per serve, you will need to make about 6 serves a day. If you get \$70 per serve, you will only need to make 3 good serves to get to \$200. This translates to half the effort, half the drive time, and half the fuel money to make the same amount of money. As such, you can charge more and serve less papers and still come out on top.

### Working with Clients

In this business, one good client can be worth thousands of dollars in revenue. Think about it, if you charge \$40 to \$150 per serve from a client, imagine you have one good client who gives you an average of 10 papers to serve every week, at a rate of \$50 a serve. This would mean 10 papers x 52 weeks, totaling \$26,000 from a single client every year!

Focus on building strong relationships with your clients, such that they will come back to you with work over and over again for years to come. Even better, satisfied clients will not mind referring you to their colleagues. That's why it's so important to be patient, especially in the beginning.

It can be difficult starting a business and money is just not coming in. However, if you can just secure a few good clients, it's possible to build a real business and earn a living. If you fail to take good care of the few clients you manage to find, they will jump ship and take their business to someone else who can. You'll then find yourself

spending all your time looking for clients constantly, with business slipping out of your fingers.

Here's what you should do:

1. Try to over-deliver with each new client, more so your first client. This would entail serving the papers quickly, effectively, and with as little hassle as possible for the client.
2. Keep in touch with your clients, ideally giving them regular updates on their cases. This is especially important for difficult serves that might be taking longer than usual.

These two simple rules will go a long way in ensuring that clients generate you business for a long time. And at the end of the day, your bottom line will benefit.

### Tips on How to Build Strong Relationships with Your Clients

Process serving is a pretty competitive field. In many cases, it takes more than being the best process server in your local area to win over potential clients, whether its private individuals or lawyers. However, certain customer service improvements can have such a huge impact on client acquisition and retention. Of course, getting more clients means more revenue.

Building a good relationship with your clients will also increase your referrals and future service requests, not to mention the potential of generating positive online reviews. The following are some ways in which you could leave a lasting impression on a new client and improve your existing relationships.

- Have clear standards: Give your clients visibility on the standard products that come with your service and your expected turnaround time. Informing them of your standards and procedures from your first contact will significantly reduce the chances for miscommunication down the line. You may also want to create a page on your website where you can send your new clients so that they know what to expect.
- Give regular status updates: Your clients will feel more respected and in control when you provide them with honest and consistent status updates about their papers. In case this seems time-consuming or overwhelming to you, consider investing in software that automates the process for you. Having an open line of communication will reduce those urgent and frantic phone calls and emails. Don't forget that the market has changed and all of your customers will be expecting some level of transparency from you. You can even make it a selling point, just don't let them ask for it.
- Send timely email responses: Consider setting up automatic email responses to inform your clients and prospects of your business schedule and availability. Based on the structure of your company, you could set automatic responses to inform clients of

the typical response time, your company hours, and any other channels you have where they can get the information they need.

- **Phone communication:** Most of your clients will want to speak to someone on the phone. Phone availability can be a key factor in determining whether or not you receive consistent work from a client. Answering their calls with your business name will help to create a professional vibe, right from the start. Being available as much as possible and returning all your clients' calls will help set you apart from your competition.
- **Be a problem solver:** When you come across a difficult situation or encounter a difficult serve, come up with ways to solve it and propose a well-researched solution to your client. Providing a potential solution will highlight your capabilities in completing even the most difficult of serves.
- **Maintain high standards for customer service:** When running your business, never lower your standards for customer service, even when you're dealing with a difficult client. Maintain your composure and offer a standard level of service. This will help you avoid negative reviews and maintain the integrity of your company.
- **Leverage mistakes to build trust:** Mistakes are inevitable. However, if you want to mitigate mistakes, resist the urge to hide and dodge your client's emails or phone calls. Instead, take this chance to enhance trust between you by proactively solving the issues at hand. You can do this by understanding the criticism and reasonably working to solve the issue, while delivering the highest level of customer satisfaction. Using mistakes to build trust with your clients is a great indicator of superior customer service, as it shows your clients that you're always there for them, even when things go wrong.

Building a consistent and lasting reputation with your clients will positively impact your company for years to come. It will essentially increase your chances of generating referrals and repeat business.

## Billing your Clients

As part of your work, you will have to create invoices and receive payments. However, in this digital age, paper invoices simply won't cut it. People are now used to making payments with a few clicks, and you should make it as easy as possible for your clients to pay. This would also mean that you will get paid faster.

A simple Google search will give you a long list of platforms that make it easy for you to bill your clients and receive payments. A good example is FreshBooks. At a low monthly fee, you can create professional invoices for each client and accept payments through debit and credit cards via their in-built payment processing. You don't need to set up a separate merchant account, and your clients will enjoy the detailed invoices.

## How to manage your Company Finances

Of course, if you want to run a successful company, you want to be careful about its finances. In this section, you will learn a few tips on how to handle the finances of your process server business, from best practices for collecting unpaid services to maintaining healthy financials for your company.

### Collecting unpaid Services

Everyone likes to get paid. However, the practice of collecting money for unpaid services is one of the less desirable parts of running a business. You could have unpaid services for a number of reasons, ranging from insufficient funds to simple disorganization. No matter why your client hasn't paid you for your services yet, you're still entitled to receive payment. However, there are a number of things you could do to address the issue, ensure you receive the funds, and prevent it from happening in the future.

Here are some best practices for collecting unpaid dues:

#### Repeat customers with unpaid services

You may occasionally work with a client who isn't timely in paying for services, but they still expect to continue receiving your service. While it's always vital to maintain a healthy, working relationship with all your clients, it should also be built on mutual respect. You can always work with clients and figure out a working payment plan, but you shouldn't let your clients take advantage of you by accepting non-payment for your services. You may find yourself out even more money and time. Their total bill will increase, and it'll get harder for them to pay the original amount on top of the new amount. So, avoid continuing services for a client that's past due at all costs.

The best practice here would be to let the customer know that they have an unpaid balance. Once you notify them, request them to take care of the balance with the payment options you have available. Don't give them the choice of paying or not paying – encourage them to pay the balance. In most cases, this will result in the client clearing their dues, which restores the needed balances in your professional relationship.

### Addressing Past Due Accounts

It's quite frustrating to provide services and the client doesn't pay. After all, you have your own overhead, and the bills need to be paid. You might be inclined to call the client immediately when you notice that they have an account that's past due. However, this is an aggressive approach, which may not be ideal as it can unintentionally escalate the situation and result in poor communication between you and your client. Moreover, contacting the client verbally won't provide the needed proof that you had tried collecting the debt owed to you before.

The best practice here is a multi-step process, with the first step being to resend the bill. It's likely that the bill was genuinely misplaced or was never received. In case the client still doesn't respond, you can try sending a friendly note to remind the client that they

have an outstanding bill. Such documentation is essential if you ever have to go to court to receive payment for your services. Remember that the last resort in such a case will be to send them a collection notice, effectively threatening to hand over the matter to court. However, this should always be the last resort to recover your losses.

If a client has ignored or failed to respond to your gentle reminders, you may feel it's time to escalate the situation by calling the client directly. Still, you should always try to remain calm and professional during the conversation, and ensure the client knows about the amount they owe, their options for settling the bill, and what their next steps would be. And while taking the client to court is the worst-case scenario, in some cases, it could be your only option.

### Best Practices in Preventing Past Due Accounts

Just like the saying goes, prevention is the best cure. The best way to prevent past due accounts is collecting money upfront for your services, for every client. This establishes trust, while creating a mutually beneficial working relationship between you and your clients. When you receive your first payment after completing a service, you can decide whether this will be a standard practice or not. Consider also choosing whether you will require a small deposit for ongoing contracts.

Another thing you want to have is a due date for all your invoices. Having a late payment charge could discourage your clients from being tardy with their payments. You may also want to have payment increases for aging accounts, which could help discourage late payments. As your company gets bigger, you may want to have a collections company available on retainer, so that your clients know there are real repercussions when they fail to pay for your services in time.

### Maintaining Healthy Financials

Getting financial and service analytics about your company will be critical to assessing what's working for your business and what needs to be changed. As a new business owner, you want to have a working idea of what's profitable for your business to not only maintain healthy finances, but also ensure continued growth.

An essential step in determining the health of a company is researching and identifying opportunities for growth.

### Services Assessment

The most requested service: Keep track of the most requested services you provide as a company and why people contact your company initially for. A service might not be the most profitable, but it could be valuable as a client intake and marketing process.



The most expensive service: while you may be occasionally hired for the most expensive service, it may only prove to be of great value. People may initially seem hesitant to purchase your largest package or your most expensive services due to the pricing. However, it doesn't necessarily mean you should lower your prices. It could give you insights such as which clients are willing to pay extra for valuable services. Nonetheless, you want to make sure the services are bringing in enough business to cover the upfront costs like licensing, upkeep, gear, and operations.

The most problematic service: if there's a service that always seems to bring you more problems than it's worth, such as complaints, chargebacks, and general difficulties, you should assess the time and resources you spend rectifying these issues. However, instead of discontinuing the service immediately, find ways to improve it. Happy clients will recognize real improvements and progress.

The least profitable service: Some services may prove not to be as valuable as you had initially hoped, and the operating costs for these services have to be covered by other services. Unless there's a marketing effort or a delayed payment turnaround, you might be forced to formally discontinue the service. Keep track of your operating costs for each of the services you offer and ensure that they can support themselves.

The biggest ROI: If a service has small overheads and big rewards, you've probably found the sweet spot! Make sure that you promote (more on this later) the service to all of your clients. The ROI might seem small initially, but it can still be your most profitable service. If it costs you \$5 to do a service and you get paid \$65 for it, this is an extra \$60 in your pocket. It might seem a small payout, but if you focus on it a little more, it could make all the difference.

## Assessment for Growth Opportunities

Start right away: The best time to start collecting and assessing your company data is as soon as you can. It might seem like a large undertaking, but all you need is to set up a few hours every week to collect and organize your company's financial information.

Use software as needed: Most of the accounting programs in the market today have built-in analytics tools. Integrating these in your business could provide you with more insights, while improving your daily operations and saving you time.

Balance your Books: this will help give you a bigger picture as to where your company is spending money. Consider using tax forms as needed to assess your costs, as this is some of the paperwork you need to complete anyway.

If you're able to assess your company's profits properly, you will be able to accurately manage the pricing of your services, and/or restructure your services and plans to cater for all aspects that go into every case. While doing so will certainly cause some painful introspective into your business inner operations, it will be well worth it in the long run when your company becomes cost-efficient.

## CHAPTER 4: MARKETING YOUR PROCESS SERVER BUSINESS

Before you even start thinking about marketing your business, here's one thing you should do: go to your favorite search engine and search for process servers near your town. Spend some time exploring what process servers in your area are doing with their businesses. Don't be shy, who doesn't love to do some harmless snooping?

You will most likely come across a range of businesses operating in your area of interest, from high volume agencies with multiple contractors or employees, to single-person operations that are run from a home office.

Here are a few items to look out for:

- The kinds of services each business offers
- Whether they've posted their rates online, and what they are
- What measures they are taking to build trust
- Features of their website you find appealing and ones that hurt the company's image
- Do they feature client testimonials and references? Do they have any photos? How do these complement or hurt their image?
- Do they include a contact form or phone number?
- What else do you find compelling or noteworthy about their website or services?

The goal here is understanding the playing field. With this information in mind, you will be able to stand out from what the rest of the process servers near you are doing, so that you can build your own position in the market.

If you can identify any gaps in the process serving market around your area, you can fill them and build a successful business. So, while you survey your competition, you should consider how you will fill one of the gaps in the market. Take some time to brainstorm a list of unique advantages and strengths that you can bring to your business. Also consider how these strengths can effectively benefit your clients.

For example, if you have a background in customer service, aim to offer the best service in town. If you have experience in any other similar field, such as you are a retired or veteran police officer, or perhaps you have the tenacity and strength of a single mum, use it to your advantage. This is going to be different for everyone; you just need to be creative and make the most out of your edge.

Offline Marketing for Process Server Businesses

## Create a Unique Sale Proposition

What would you say is the unique selling proposition for your business? If you're wondering what it is, think of it as what your business will be known for. It essentially lets a potential client know what your business is all about, what to expect, and what you can do for them. Ideally, you should present your business in a unique way to feature your strengths. This way, it will be easier for you to attract clients looking for what you offer.

Create a list of the strengths as discussed in the previous section and use it to create a unique selling proposition of your own. Be sure to add your own personal touch, as it gives your clients a real person to connect with, which goes a long way towards enhancing trust.

Consider this example: In San Francisco, there's a story about a process server who pedaled his bike from law firm to law firm, calling himself "San Francisco's Greenest Process Server". He was able to appeal to quite a large number of "do-good" lawyers in the city, and his business actually did well. He was not only able to meet the needs of his customers (serving papers reliably), but also do his job in a way that was appealing and memorable to his clients.

Success in this business will come from satisfying the needs of your clients in ways that other process servers can't. Scratch your clients' itch and they will keep coming back for years to come.

## Introduce Yourself Directly to Law Firms Near You

One of the fastest, easiest, and cheapest ways to get your first clients is introducing yourself to law firms around your area. As mentioned earlier, law firms are the bread and butter of the process serving business. While a small law firm might only need you for small tasks here and there, a large firm can potentially have dozens of papers to serve every week. Either way, generating repeat business will enable you to score a client once, and then get paid consistently for months or years down the line.

One way to introduce yourself is just driving around to the different law firms near you and handing out your business cards. It's important not to think of it as selling. you aren't a commissioned salesperson looking to push a subscription to a magazine or the latest copy machine. Sales people tend to annoy law firms, especially the paralegals and legal secretaries that staff the front desk. Avoid coming off in a way that screams, "toss my material in the recycle bin!" Rather, you should go for a totally casual approach. When there isn't an immediate commitment, the pressure is lifted, making your pitch more effective.

It's also important to note that some legal practices tend to have a lot more papers to serve than others. When starting out, consider targeting divorce attorneys. Why? Well:

- Divorce lawyers are usually plenty in more areas (this is just the reality of the modern society)
- Divorce law firms will tend to generate a steady flow of papers due for serving
- The defendants of divorce cases are much easier to locate – the spouse will most likely be ready to tell you where and when the subject works
- Self-help legal offices (or even law firms) that don't arrange for service of process will be open to referring their clients to you

Of course, the nature of your market will vary depending on your area. You could be more successful working with collection offices, real estate lawyers, car dealerships, or landlords. However, divorce lawyers are often a great place to start, and then expand out from there. Also, avoid wasting time with criminal attorneys. Process servers typically deal with civil cases, and there's a big difference between civil and criminal attorneys. When starting out, visit about 10 to 20 law firms near you. By the end of it, you should have a few good leads, or perhaps one or two clients lined up.

Another thing you should also remember is that a huge percentage of process servers are actually terrible with their customer service. Some are just lazy and simply won't follow up with their clients, while others have the "wannabe cop" attitude as mentioned earlier. Many savvy lawyers usually don't buy it, and they know process servers come and go. So, don't be surprised that paralegals and attorneys will keep one eye open for a reliable process server.

Just make sure you present yourself well, and they might just give you a case or two to see how you'll fair. In such a case, prove yourself so indispensable that they will have no other choice but to let you handle all their serves.

For those that will be operating in a big city, you will already have an edge in that there are many law firms to work for. On the other hand, if you live in a smaller town or city, you may want to consider teaming up with a process server in your nearest big city and exchanging work. Have them refer any serves in your area to you while you refer any work you get in the city back to them.

Don't let being in a small town down your spirits – even small towns have law firms. You only need to position yourself as the authority or go-to process server for the local community. It's sometimes much better to be a big fish in a small pond; you get to enjoy all the minnows you can eat with no sharks coming after you.

Business Cards

Now that you already set up your professional contact details and got a business phone number on Google Voice (or elsewhere), it's time to order some business cards that you can hand out to your friends, family, and professional contacts.

Make sure that your business card has a clean, contemporary design, ideally one that doesn't distract from your contact information. There are a number of online vendors that sell personalized business cards. Alternatively, you could head over to your local print shop for the same. Alternatively, you could use online business card design tools to design a business card based on your tastes.

### Join Process Server Networks and Associations

One of the easiest and most effective ways to market your process server business is to join process server associations and networks. Below are a few benefits of joining a process server association:

Process server associations give you access to legislative updates: To ensure that you're serving according to the current laws and regulations in the industry, you want to find a way to keep up with what changes are happening and when or how they will go in effect. Associations will typically help keep you up to date with these changes.

Helps you gain credibility: Most process server associations usually have bylaws and code of ethics. Such requirements help make sure that the members are doing their jobs as process servers as they should, with proper licensure, permits, bonds, etc. and in accordance to all laws. As a member of a process server association, your clients will get the impression that you pledge to abide by the bylaws of the association, and that you can be held accountable if you don't.

Career advancement potential: Process server associations will give you plenty of ways to advance your career, including options to network with other experienced process servers, from whom you can learn and get trusted associates to share work with, ultimately giving you access to a lot more business opportunities.

In the process serving industry, the largest professional organization is NAPPS (National Association of Professional Process Servers). It's worth taking a look. However, avoid getting too wrapped up in professional organizations until you're ready to take on the next step in your business.

Not everyone enjoys meetings, networking, and talking shop with other people in their industry, along with the socializing and drinking that often occurs afterwards. And even if you do, it

### Digital Marketing for Process Server Businesses

For people who hate going door-to-door and cold calling prospects, digital marketing is always a great option. In fact, it has become almost impossible to operate a successful

business without having some form of online presence. Most people looking for your services will probably go straight to Google, and so will prospects looking for more information about you or your business.

## How to Build a Compelling Website

If there's one thing that can generate substantial dividends down the line for your business is having a great website. Creating a website, or improving your current one from just okay to great, could be one of the smartest investments you make to have you gain clients right from the hook.

In the current market, websites have mostly replaced in-person visits, business cards, and printed marketing material as people's first impression of your business. Your website will ideally highlight your level of professionalism, letting people know why they should work with you. It also attracts more business leads, while providing them with a way to contact you. It works as your marketing director, available 24/7. As such, you don't want a marketing director who is disorganized or sloppily dressed – why would you want a disorganized or sloppy website to represent your business?

Just as a sharply dressed lady or gentleman can grab the attention of the entire room, so can your website if it's visually appealing. Here are the fundamentals you should have in mind when designing your website:

**Layout:** When it comes to layout, simple is often better. Lots of text, a jumble of flashing images, scattered links, and unnecessary background music are distracting, and can make visitors leave your site. Your best bet is to stick with concise yet informative content, an uncluttered layout, as well as functional and appealing images, which should be more than enough for your visitors.

**Imagery:** It probably doesn't make any sense to have photos of your dog, a tree, or other things unrelated to the process server industry. Having too many images, especially ones that don't fit the context, will only drive people's attention away from the valuable information contained on the page. Use images that convey the personality of your business, your business philosophy, and work ethic.

**Colors:** just as with images, colors should be used sparingly on your site. You don't have to use every color in the spectrum – pick 2 to 5 colors that go together. You want your content and contact information to stand out, not the colors. Use tools like ColorHunt (<https://colorhunt.co/>) to find great color combinations for your website.

**Content:** The content you publish on your website should be valuable, informative, relevant, optimized, and ultimately helpful to your visitors. Answer questions like: Who are you as a business? What services do you offer? Where do you provide the services and where are your offices located? Why should they choose your business? What's the timeline of having a job completed? Make the content as easy to find and read as possible, so that visitors can quickly learn about your company. Ensure that all content

is spell checked and copy-edited to avoid coming off as unprofessional. Don't forget to include accurate contact information in easy to reach places.

**URL:** Ideally, your domain name should be easy to remember, and related to your services and location, as mentioned in Chapter 2. Try to keep the name short, relevant, and memorable. Location and industry reference are usually great for search engine optimization (SEO) as well as for first time clients who want immediate acknowledgement for your services and location. Brand identity is vital for your repeat customers, and will come in handy when they're coming back for your services or referring you to other clients.

**SEO:** Now that you have a great domain name, you want to make sure that people can find your website. Optimizing for search engines like Google, Bing, Yahoo, etc. will make it easier for people to find you when they look up process servers online. There's so much that goes into SEO, which would perhaps fit another book, however, it's all about a comprehensive effort that involves site structure, content strategy, meta tags, and a lot more. There is a lot of free SEO content online, which you can check to learn more. Otherwise, consider consulting with someone who knows how to do SEO and have them help you with your site.

**Load Times:** Although these are part of SEO, it's still important to point them out. Nobody wants to open a website and spend over 30 seconds waiting for it to load. Many users hate this, and they will often move on to the next website on their search engine results. A great way to prevent slow load times is to minimize the use of graphical content or minimize the size of every graphical content you put up.

**Navigation:** Visitors should be able to move from your Home page to your About Us page to your Contact page and back to the homepage without breaking a sweat. It's easy for web users to get frustrated when a site is designed in a way that you have to do detective-like work just to figure out where the information you need is located. Ensure that your site is easy to navigate, with clearly defined paths that lead people to their desired pages and/or information.

**Links:** Broken links will not only frustrate your visitors, but also lower your ranking on search engines. Be sure to test your links regularly. There are free online tools that can automatically test your links to ensure nobody ever comes across an error message on your site.

All this might seem to be a bit overwhelming, especially for beginners. However, working with someone who has the knowledge and experience in building websites can help make the process easier for you.

Social Media Marketing for Process Servers

Since the inception of the internet, social media has grown exponentially, such that it's now entrenched into the lives of most people, and has become a powerful marketing tool. Whether it's Instagram, Facebook, Snapchat, Twitter, LinkedIn, or Pinterest, you can leverage different social media platforms to enhance their online presence and get their name and product out there.

The following are a few pointers to guide you on social media marketing:

**Research:** The first thing you want to do is to familiarize yourself with the different platforms and observe what fellow process servers have done with their pages. Learn how they interact with their users on the different platforms, and how they carry themselves. The goal here is to identify what they are doing right or wrong, so that you will have a good idea about where to start.

**Test the Waters:** Now that you're familiar with how other similar companies are leveraging social media, it's time to jump right in. Create company profile pages on each social media site as needed, and start interacting with users. You can actually make lots of quality business relationships on these platforms. For instance, LinkedIn is geared towards professionals, and it will let you make professional connections and share/get industry knowledge. On the other hand, while Facebook and Instagram are more personal, they do have the most users, and it's likely that most of your clients are already on these platforms.

**Contribute:** While social media is a great tool for networking, it's not just about the number of connections you create. It's all about the quality of your connections. If you want to create value, you want to provide people with content that's of interest to them, and/or answer questions related to your company or industry. One way to achieve this is having a blog on your websites, where each post is shared to the social media platforms. To be effective, ensure that you update your blog at least once a week, otherwise, your readers will lose interest. In case blogging sounds like such a headache, consider "microblogging" on Twitter. You can create strong relationships on Twitter that would potentially lead to more opportunities.

All in all, keep in mind that social media is all about the conversation. The best way to market your expertise and professional services is engaging in conversations first, and then advertise your services later. The same way you wouldn't go to a networking event and break into conversation with a commercial about your company, you shouldn't do it online. Take the time to cultivate relationships first and establish yourself as an industry professional, and the marketing side will naturally come into the picture. This way, you will have a greater opportunity to reach more people.

Furthermore, while social media is a great way to market your business to clients, it also has some intrinsic benefits when it comes to SEO. Being listed on the different platforms and high authority websites across the web will help to legitimize your company and offer valuable backlinks to your website. This goes a long way in boosting your overall online ranking and saturation. And as we're going to find out next, customer



reviews are also powerful when it comes to SEO, and social media provides an avenue for your satisfied clients to leave a review.

### Let your Satisfied Customers Leave Online Reviews

As already mentioned, most clients these days will search for a process server online. If you rank higher on the search engines, you will get more traffic, and therefore have more opportunity to get new clients. The search engine giant Google naturally prefers listing websites or businesses that have already received a few reviews online, in an effort to recommend the most genuine and top-rated businesses to its users. Generating positive reviews will allow your business to be placed on the first page of search results, and who wouldn't trust a business with positive reviews over one with none?

As such, you should gradually work to ensure that you're getting reviews online from your satisfied customers. There are three main platforms where users will search for reviews about a business: Google, Facebook, and Yelp. You should set up a company page/listing on each of these to get started.

But how do you encourage your clients to leave reviews?

Well, for starters, if you have an active social following, you can post there. Most people will already be on Facebook, which makes it easy for them to leave reviews there. You can also send follow-up emails requests for reviews. In fact, many businesses these days are regularly sending follow-up emails to their customers after providing a service to make sure that their client had a good experience. Ensure that you let them know that you appreciate their feedback, even when it's negative. This will allow you to see ways in which you can improve your service or your business.

Nonetheless, a few positive online reviews can actually bring you more business than paid advertising. So, the next time your client compliments you, kindly ask them to leave you a positive review.

Below is a sample email template:

Dear [client name]

On behalf of [name of your business], I'd like to thank you for your business. If you like what we do, please consider adding a review of our services to help us reach others. You can find our business profile on Google, Facebook, and Yelp.

We hope to hear from you again soon.

[Your Signature]

With time, you will start getting reviews, and your hard work will have paid off. Remember to check Yelp, Google, and Facebook at least on a monthly basis and respond to all reviews, whether positive or negative.

## Local Search Optimization

Local search optimization is all about optimizing your website for the search engines, making it much easier for local clients to find you. When gathering information for local search, search engines typically rely on signals like local content, links, social media profile pages, and citations to provide the most relevant local results for the search user.

Local search is a powerful marketing tool for small businesses, as it creates an even playing field to compete with even the biggest of businesses, who probably have much higher digital marketing budgets. The following are some of the basics you need to tackle to optimize your business for local search:

- Create and optimize for Google My Business to help Google verify that your business is authentic.
- Improve the internal linking structure of your website to improve navigation
- Optimize your URL, content, headers, and meta description of your website. Consider using high volume keywords in these fields.
- Integrate location specific pages to your website that provide the name, phone number, address, operating hours, service descriptions, and testimonials from happy clients
- Create content focused on your locality to attract a local audience
- Make sure that your business name, phone number, and address are consistent all across the web
- Ensure your site is responsive on all devices (make it mobile-friendly)
- Optimize your citations on online directories, including Google, Bing, Apple, Yelp, etc.
- Share your Google My Business Page on Social Media
- Consider guest blogging on authority process server websites to create backlinks to your website

Again, if all this sounds daunting to you, consider consulting a professional web developer and SEO expert to help you navigate the details.

## CHAPTER 5: THE FUTURE OF PROCESS SERVING

In the U.S., the legal system has mainly remained consistent for hundreds of years. Process serving is part of this system, and is a field that won't disappear any time soon. However, this doesn't mean that the field isn't evolving with the times, just as with any other industry.

In the past few years, the industry has seen significant technological transformation, such as with service of process via email or social media becoming accepted by courts, while other traditional methods have been phased out. Your process server business will also not be immune to change, but if you can adapt as needed, you can guide your business to great success. Here are a few ways your business can adapt:

**Digitization of Services:** Many courts are now requiring e-filing – ensure that you provide this service. Although clients can file documents on their own electronically, you can offer research as an add-on service, along with making sure the paperwork is accurate. In situations where it's easier for the clients to hire you rather than file the e-documents themselves, you will get guaranteed business. So, work to become an e-filing pro in your area to avoid being left behind the curve.

**Personal marketing:** Don't always expect your clients to find you where you are; instead, put some effort into marketing your business directly where your customers are. This means process server associations, industry networks, bar associations, and courthouse. Consider even taking this a step further by offering your services directly to local courts, and find out if they have a referral or affiliate program.

**Learn more ways to Serve:** If you want to be a savvy process server, you can't afford to maintain the status quo. You want to keep yourself up to date with new technologies that can help you do your work more effectively. Just because something is already working doesn't mean it can't be improved. Look into things like process serving software, and consider integrating ways to make invoicing and payments easier.

**Leverage the already available Technology:** If you aren't making the most out of the existing technology, you risk falling behind and not catching up to those who've embraced technology when it comes to serving papers. For instance, GPS may not only help you find the exact location of a subject, it can also help verify to the client or court that you served the papers in the right location. This way, it makes your job much easier while improving your success rate. Consider also using a body camera when needed, and keep up to date with things like electronic service of process to stay ahead of the curve.

**Be a Problem-Solver:** Don't just dismiss papers as "un-servable" – use these as a way to find new methods, services, and technologies to complete the service. Invest in researching new methods for serving process. This will give your business an opportunity to prosper and place it on the cutting edge as the process serving industry adopts the new advancements in technology. The change in digital capabilities is

leading to gradual changes in process serving. Process servers who embrace, implement, and keep up to date with new strategies to cope with the changing industry landscape will see greater success in an often challenging industry.

## Conclusion

If there's one lesson to take away from this book – don't get sidetracked by the small stuff.

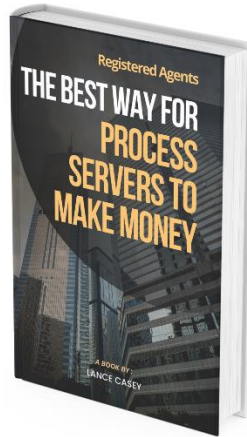
Despite the wealth of information impacted by this book, process serving is a simple business at its core. Just start with the basics and figure things out as you go. Don't worry too much about what other process servers are doing. Stay focused on finding your new clients. If you can do this, you will be able to build a business that will hopefully outlast the trends and provide for you and your family for years to come.

Here is a quick summary of how to get started:

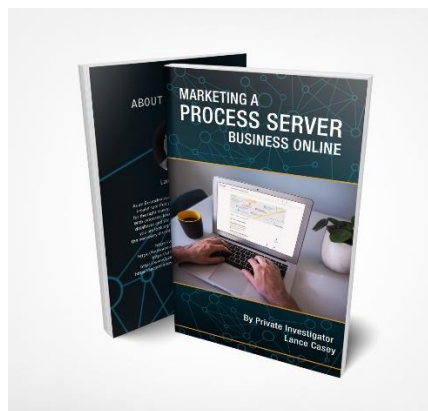
1. Find out what it takes to become a process server in your state, and if you meet the requirements
2. Register your business and setup a local business bank account to start accepting payments
3. Get a free Google Voice office number and forward it to your phone
4. Build a website and social media pages to highlight your services and persuade clients you're their right partner
5. Create a nice marketing letter and distribute it to law firms, attorneys, and potential clients
6. Order a stack of well-designed business cards that feature your office number and web address
7. Visit law firms around you, introduce yourself, and ask for work
8. Try repeating step #7 until you get your first client
9. Over-deliver on your first serve to ensure you get more business moving forward
10. Ask for referrals and continue growing your business.

# Process Server Toolbox Resources:

- Subscribe to our YouTube Channel: [Process Server Training Academy](#)
- [Follow us on TikTok](#)



- Get a copy of my Ebook "[The Best Way For Process Servers To Make Money](#)"



- Get a copy of my Ebook "[Marketing A Process Server Business Online](#)"
- Prior Process Server Training Ride Along: <https://process-server-training.com/ride-along/>
- Join our Facebook Groups

[Process Server Training Academy](#)  
[Process Server Advertising and Marketing Group](#)

- Sign up to take our [Process Server Training Course](#)
- Add your process serving business to our Process Server Directories:
  - [National Process Servers Directory](#)
  - [Process Server Training Academy Process Server Directory](#)
  - [Process Server Jobs Process Server Directory](#)
  - [Process Server Niche Marketing Directory](#)
  - [Service of Process Server Directory](#)
  - [Lance Casey & Associates Process Server Directory](#)
  - [Small Claims Court Process Server Directory](#)
  - [We Serve Restraining Orders Process Server Directory](#)
- Build Your [Process Server Website](#).
- [Best Process Server Website Contact Form](#):
- [Start a Process Serving LLC or Corporation](#)
- [Get A Process Server Business Address](#)
- [Process Server Email Marketing Software](#)
- [Process Server Skip Trace Software](#)