

June 2023

From the Desks of Your D.C. Bar Practice Management Advisors



New Video Resource Library

by Kaitlin E. McGee

We had three great [Lunch and Learn programs](#) in the past few weeks and set the record for the most attendees at a Lunch and Learn in PMAS history. First, we had a great marketing program on [creating a user-friendly law firm website](#). Then, we had a fascinating presentation on [AI and its implications for lawyers](#). And finally, we had a program on [becoming \(and hiring\) a freelance attorney](#) and the freedom this model can offer to lawyers. These programs were all recorded and are [available now on our website](#).

In addition, we have organized our archival video programs into categories in our new [Video Resource Library](#). You can use these programs to learn more about developing and

improving various aspects of your business, as well as continuing your education in areas like [negotiation](#) and [public speaking](#).

Make the most of these resources to further your professional growth, stay ahead of industry trends, and sharpen your skills. We are here to support your business growth and ensure you have access to the tools and knowledge needed for success.

Whether you are starting a firm from scratch or growing and managing an existing firm, PMAS has resources to help you create and meet your business goals. To schedule a one-on-one meeting with us, email PMAS@dcbar.org. For courses and trainings we offer free to D.C. Bar members, visit our website.

AI for Law Firms

If you attended our recent program on AI and its implications for lawyers, you likely gained valuable insights into how AI can be effectively integrated into legal practice. The rapid development of AI technology continues to introduce new tools and possibilities for law firms each week. As we stay informed about these advancements, we aim to keep you up to date on the latest tools and strategies that can benefit your firm.

- **Writing tools** (other than ChatGPT):
- [GrammarlyGO](#) to check for errors and readability
- [Jasper](#) for marketing copy
- [HoppyCopy](#) for email marketing
- **Tech Support:** Ask ChatGPT to solve a software issue or write a spreadsheet formula
- **Document Analysis:** Use [ChatPDF](#) to analyze PDF documents and get the information you need

If you are using AI in your firm, let us know how at PMAS@dcbar.org.

Basic Training & Beyond

If you're starting a firm, [Basic Training & Beyond](#) is a great jumping-off point. Day One will teach you the essentials to get your firm off the ground, and Day Two will help you grow

and manage your firm.

Our monthly [Basic Training & Beyond](#) is set for **June 6 & 20, 2023 / 9:15 a.m. – 4:30 p.m.** We will meet in-person in the Williamson Conference Room on the third floor of D.C. Bar headquarters. Attendees must comply with these [protocols](#) to enter the building. The program is presented monthly for members and law firm staff.

[REGISTER HERE](#)

This program has been presented more than three hundred times for more than 4,000 lawyers over the last fourteen years, and many have launched and are now operating small law firms. We stay connected with many small firms, and what we learn informs the content for this program.

Managing Money

[Managing Money](#)

Monday, June 12 | 9:00 a.m. – 12:30 p.m.

On June 12, learn how to onboard a new client by creating the appropriate fee agreement; make the proper entries onto the client ledger and trust account when needed; track the established earning mechanism; and make proper entries in the firm's operating or business account. Our next in-person session of Managing Money is set for **June 12, 2023, 9:00 a.m. – 12:30 p.m.**



We also present Managing Money on request for a law firm or organization.

[Register for an upcoming session or schedule a session for your firm here.](#)

[REGISTER NOW](#)

Lunch and Learn

Join us for upcoming [Lunch & Learn Programs](#), including:

- June 15 – [Powerful Marketing Tactics for Small Law Firms: How to Attract More of the Right Clients](#)

All programs begin at noon on Zoom. Register for any or all [here](#).

Successful Small Firm Practice Course

We have launched the Successful Small Firm Practice Course in a new way...

Are you interested in a business incubator approach to growing your law firm?

Consider this course, which has been a staple for several years as a series of multi-session programs focused on starting and growing a firm with attendees creating work product for the firm. Now we offer the course upon request on an individual basis designed to help the lawyer develop their firm in a series of one-on-one sessions.

The course will be able to focus precisely on the type of firm the member wants to create and will take place at a pace that suits the lawyer. Lawyers work through their business and marketing plans and have built-in accountability for achieving their business goals.

If you are interested in this approach to creating and growing a law firm, contact pmas@dcbar.org.

Resources

The Lunch and Learn Series is [here](#). New programs are added regularly. Recordings and materials from recent programs are [here](#). If you have an idea for a program, let us know at: lunchandlearn@dcbar.org

Missed any of these recent sessions? Access the recordings and materials anytime or visit our [Video Resource Library](#).

- **Freelance Lawyer Freedom: How to Create a Lucrative, Flexible, and Rewarding Business as a Freelance Attorney** with Sonrisa Lewis, Esq.
- **The Rise of AI in the Legal Profession: Lawyers Brace for Impact** with Sharon D. Nelson and John Simek
- **Law Firm Compensation & Bonuses: Planning for 2023** with Brenda Barnes and Camille Stell
- **Stop Wasting Time on Tire-Kickers and How to Create Standard Operating Procedures (SOPs) That Save Time and Money in Your Law Practice** with David Skinner and Karen Dunn Skinner
- **Take a Tour of MyCase** with Valerie Amparan
- **Modern Business Development: Winning Clients & Talent Online** with Sameena Kluck
- **Thriving Not Just Surviving: Boundary Setting in Practice** with Niki Irish and Sharon Greenbaum

More News from PMAS

We are contributing to the Bar's blog at [Duly Noted](#).

If you are interested in a practice management assessment, [click here](#).

– Kaitlin & Dan

In other news . . .

Join us virtually on **Wednesday, June 14**, for the [D.C. Bar Annual Wellness Summit](#), a day dedicated to helping legal professionals find a healthy balance between the demands of the legal profession and personal well-being. [Register for FREE](#).

For the recent results of the groundbreaking study on attorney mental health and well-being, [click here](#).

Here is new ethics guidance on Restrictions on Accepting a Legal Fee For Benefit of Certain Incarcerated Persons Before Notifying Prior Counsel of Record: [Legal Ethics Opinion 384](#)

For more information on PMAS programs, [click here](#).

CLE, Communities Events & Pro Bono:

Continuing Legal Education programs are [here](#).

Communities Events are [here](#).

Pro Bono Center training programs are scheduled [here](#).

As we return to D.C. Bar headquarters for meetings and events, everyone entering the building will need to comply with the [COVID Guidelines](#).

Our Practice Management Advisors are:

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Practice Management Advisors have a free and confidential relationship with D.C. Bar Members pursuant to Rule 1.6(j) of the D.C. Rules of Professional Conduct.



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