

February 2023

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



### Changing How We Show Up

Meetings and conversations between lawyers these days typically take place virtually, using Zoom, cameras, and microphones to connect. Nevertheless, the latest and first [Basic Training & Beyond](#) of 2023 took place exclusively in-person for the first time since the beginning of the pandemic, which noticeably added more opportunity for participation and collaboration.

If you run your own law practice, you've undoubtedly noticed some of these differences when working with clients and staff remotely instead of in person. While remote work is unquestionably convenient for most of us, there are certain pieces of human interactions that get lost in the translation from analog to digital communication. If you're looking for a place to hold in-person meetings but don't have a need for full-time office space, check out the [DC Bar's Member Connection Suite](#), which offers free office and conference room space to members.

In addition to in-person meetings, another way to build and rebuild connections with clients, colleagues, and potential clients after a few years of conducting business remotely is to utilize hard-copy communications. Receiving a holiday card with a handwritten note will always catch the attention of the recipient more than an email or social media post.

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. Email [PMAS@dcbar.org](mailto:PMAS@dcbar.org) to schedule a one-one-one meeting. For courses and trainings we offer free to DC Bar members, visit our [website](#).

## 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.

**Here is how to start, grow and manage a law firm in a large, urban market during a pandemic.** Our monthly [Basic Training & Beyond](#) is set for February 21 & 28, 2023 / 9:15 a.m. – 4:30 p.m. We will meet in-person in the Williamson Conference Room on the third floor of 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.

## Lunch & Learn

All sessions begin at noon EDT.

Join us in 2023 for these [Lunch & Learn programs](#):

- February 16, 2023 – Stop Wasting Time on Tire-Kickers

Read more at [Small Firm Lunch and Learn Series](#)

All programs begin at Noon. You may attend by Zoom video conference.

[SEE ALL SESSIONS](#)

## Managing Money

On March 13, 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 session of Managing Money is set for March 13, 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.](#)

## 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 & 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](mailto: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](mailto:lunchandlearn@dcbar.org)

And if you missed **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, **Cyber Exposure for Law Firms** with Mark Lefever, **Upgrade Your Personal Operating System** with Anne Collier, **How to Build a Brand as a Lawyer** with Tim Ito and Janet Falk, **Officing at Carr WorkPlaces** with John Birmingham, **5 Steps to Grow Your Firm Online** with Annette Choti, **Vetting Technology** with Sharon Nelson & John Simek, **Working with Clients in Trauma** with Katharine Manning, **Manage the Challenges of Going Back to In-Person and How to Improve Your “Stage Presence”** with Ingela Onstad, **5 Steps to Creating Great Marketing Content as a Lawyer** with Tim Ito and Boney Pandya, **How to Start or Expand Your ‘Low Bono’ Legal Practice by Joining DC Refers** with Charlie Lemley & Jennifer Lyman, **Negotiation Essentials** with Max Bevilacqua, **How Can DocuSign Help a Law Firm Manage Agreements** with Rob Everette, Lucy Nagasawa, and Rory Sullivan of DocuSign, or any of our other programs, here are the [recordings and materials](#).

### 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 . . .**

Here is the Lawyer Assistance Program [Dispatch](#) newsletter for the Summer. For the 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.