

August 2022

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



Practice 360 is set for September 14, 2022

Practice 360 is in-person at Bar Headquarters on **September 14, 2022**. Improve your negotiating skills, incorporate wellness into your daily routine, boost your marketing and meet other lawyers with similar interests. We hope to see you.

Practice 360 is an all-day event filled with [programs](#) to help you improve your practice, and you can earn up to **3 CLE ethics credits**. Register now for early bird pricing.



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Successful Small Firm Practice Course

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

The Course 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. We now offer it 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. If you are interested in this approach to creating and growing a law firm, contact PMAS@dcbar.org.

Basic Training & Beyond

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 August 17 & 24, 2022 / 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 or by Zoom videoconference. In-person attendees must comply with these [protocols](#) to enter the building.

REGISTER HERE

This program has been presented 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

On September 26, 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 and Zoom session of Managing Money is set for September 26, 2022, 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.](#)

Lunch & Learn

All sessions begin at noon ETD.

AUGUST 11

Five Steps to Grow Your Firm Online with [Annette Choti of Law Quill](#) / Learn the exact steps you need to take, in the correct order, to grow your law firm online and gain more clients. Annette is a lawyer who just published Click Magnet, The Ultimate Digital Marketing Guide for Law Firms.

Webinar | [Register Now](#)

AUGUST 18

Officing at Carr WorkPlaces / Learn how office-on-demand services work for your law firm.

Webinar | [Register Now](#)

SEPTEMBER 15

Upgrade Your Personal Operating System with Anne Collier of [Arudia](#) / Learn how to transform the way you think to be an island of calm in a tsunami of fear and doubt.

Webinar | [Register Now](#)

SEPTEMBER 22

Cyber Exposure for Law Firms with Mark LeFever of [USI Affinity](#) / Why lawyers are prime targets for a cyber attack and what they can do to protect their law firm.

Webinar | [Register Now](#)

[SEE ALL SESSIONS](#)

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

All programs begin at Noon. You may attend by Zoom video conference. Register for any or all [here](#).

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.

And if you missed **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, **Perfect Your Pitch** with David Skinner and Karen Dunn Skinner, **How to Detect, Mitigate, and Respond to a Cyber Attack** with Rob Saland, **Are You Lawyering or Laboring** with Maddy Martin, **How Hive Mind Can Help Your Law Firm** with Sara Kropf, Pratibha Agarwal & Jane Lemley, **A Higher Bar: How to Exceed Client Expectations in a Virtual World** with Tim Bedford of Ruby.com, **Protect Your Law Firm from the Biggest Security Threats of 2021** with Tom Lambotte, **What Small Firm Lawyers Need to Know about Malpractice & Cyber Insurance** with Mark Lefever, **Local SEO for Law Firms** with Casey Meraz, **Automating Billing and Accounting for Lawyers** with Deborah Schaefer, **Write Your Marketing Plan Now** with Mary Ellen Hickman, **20 Ways to Increase Your Firm's Online Visibility** with Annette Choti, **Next Level Online Oral Communication & Advocacy Skills** with Christine Clapp, **Collaborative Law Practice** with Alice Ahearn & Emily Baker, the **5 Most Common Trust Accounting Mistakes** with Tom Boyle, or any of our other programs this year, 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 **Disclosure of Client Confidences or Secrets in Compliance With the Outside Counsel Guidelines of Another Client**;

Advance Agreement to Withdraw from Representation in the Event of a "Midstream" Conflict: [Legal Ethics Opinion 383](#).

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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