

September 2023

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



### **Leveling Up Your Practice and Firm This Fall**

**by Kaitlin E. McGee**

September often feels like a new year in many ways. With people returning from vacation and schools back in session, it can be a great time to start a new project, establish a routine, or incorporate a new practice into your business.

If you feel like you could use some inspiration to level up your firm, a perfect place to start is by attending [Practice 360: A Day for Lawyers & Law Firms](#). I'm excited that we are back in person this year, with some amazing speakers to inspire and educate you on the issues that affect both the practice and the business of law.

To help you enhance your negotiation skills, Max Bevilacqua expands on his session from last year by delving into the fascinating topic of how our personal relationships can affect our

ability to effectively negotiate for our clients and ourselves. Max is a captivating and entertaining speaker, and this plenary session, [Parents, Partners, and Lawyers - Your Negotiation Style\(s\)](#), will be a great start to the day.

[Tracey Coates](#) and her associates will follow with a discussion about how nontraditional marketing techniques, like podcasting and television appearances, can help you build a thriving law practice. From there, the day will continue with breakout sessions on topics including marketing, strategic planning, and AI in the law. You'll also have the opportunity to [earn 1.5 Ethics CLE credits](#) and connect with other attorneys.

[Registration is open now](#), with early bird savings through September 4.

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. For courses and resources we offer free to D.C. Bar members, visit our [website](#).

#### **AI for Law Firms**

Do you have staff or a virtual receptionist answer the phone at your firm, or do calls go to voicemail when you're not available? AI phone systems like [Echowin](#) can help screen and route client calls to the right person. The AI technology used by these systems will likely continue to improve in the coming months and years, and your existing phone system may also start adding AI elements to help you manage your calls.

If you are using AI in your firm, let us know how at [PMAS@dcbar.org](mailto:PMAS@dcbar.org).

#### **Sponsored Advertisement**



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The text 'AI Responsibly with' is in a blue sans-serif font. To its right is the 'nd MAX' logo, which consists of the lowercase letters 'nd' in white inside a blue square, followed by the word 'MAX' in a bold, blue, uppercase sans-serif font.

#### **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.** Our monthly [Basic Training & Beyond](#) is set for **September 19 & 26, 2023, 9:15 a.m. – 4:30 p.m.** We will meet in-person in the Williamson Conference Room on the third floor of the D.C. Bar headquarters. 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 attendees have launched and are successfully operating small law firms. We stay connected with many small firms, and what we learn informs the content for this program.*

## Lunch and Learn

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

- September 14 – [Law Firm Growth with Jennifer Kasman](#)
- September 21 – [Five Things Lawyers Need to Know About QuickBooks and the Trust Account](#)

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

## Managing Money

### [Managing Money](#)

**Monday, September 28 | 9:00 a.m. – 12:30 p.m.**

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.

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](#)

## Successful Small Firm Course

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

Consider working with us on an individual basis. We now offer the [Successful Small Firm Practice Course](#) in a series of one-on-one sessions. The Course serves as an incubator for solo attorneys and small firms and helps them work through their business and marketing plans with support, feedback, and guidance. Lawyers can focus on the type of firm they want to create and work through the Course at their own pace with 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

Our Video Resource Library is [here](#). New programs are added regularly. Our full archive of recordings and materials is [here](#). If you have an idea for a program, let us know at: [lunchandlearn@dcbar.org](mailto:lunchandlearn@dcbar.org).

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

- **Discover Smokeball:** The Legal Practice Management Solution for DC Lawyers
- **Dealing with Law School Debt** with Jessica Medina
- **Law Firm Liability Exposures: How to Protect Your Firm Against Cyber Liability Claims** with Mark Lefever of USI Affinity
- **Powerful Marketing Tactics for Small Law Firms: How to Attract More of the Right Clients** with Mary Ellen Hickman

- **Freelance Lawyer Freedom: How to Create a Lucrative, Flexible, and Rewarding Business as a Freelance Attorney** with Sonrisa Lewis, Esq.

#### **More News from PMAS**

Read our [Duly Noted](#) blog post on how to jump start your marketing.

[Contact us](#) if you are interested in a practice management assessment.

– Kaitlin & Dan

#### **In other news . . .**

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

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

Here is new ethics guidance on **Advising Clients about Communications with Represented Opponents**: [Legal Ethics Opinion 385](#)

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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Every D.C. Lawyer's Must-Have Resource

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