

December 2022

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



Are You Preparing for a Fresh Start?

As the New Year approaches, it's a great time to assess where you're at and potentially start something new. Some attorneys set January 1 as the date when they want to start their new firm, while others look to the New Year as a time to create and implement a new marketing strategy.

Whether you are starting from scratch or building an existing firm, PMAS has resources to help you create and meet your business goals.

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.

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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 December 7 & 14, 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 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.

Marketing Trainings

If you want to learn more about successfully marketing your law firm, check out these [Lunch & Learn programs](#) from our archives and stay tuned for more programs in 2023:

- [Perfect Your Pitch](#) with David Skinner and Karen Dunn Skinner
- [5 Steps to Grow Your Firm Online](#) with Annette Choti
- [Modern Business Development: Winning Clients & Talent Online](#) with Sameen Safdar Kluck

Managing Money

On December 5, 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 December 5, 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.](#)

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.

Lunch & Learn

All sessions begin at noon EDT.

DECEMBER 15

[Take a Tour of MyCase](#) with Valerie Amparan.

Join us to learn more about the new things happening at MyCase, a [D.C. Bar Member Benefit](#), including the new MyCase Accounting. Having recently joined the LawPay family, MyCase is the fastest growing legal practice management software that's easy to adopt and use so you can do more of what matters.

In this session, you'll learn how this powerful practice management tool can help you:

- Digitize your client intake
- Manage your prospective client pipeline
- Track all case details, file, and communication in one place
- Automatically track time, generate invoices, and get paid faster
- Keep all finances in order with all-new MyCase Accounting

D.C. Bar Members are eligible for a 10% discount on MyCase.

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 **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, **Perfect Your Pitch** with David Skinner and Karen Dunn Skinner, 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.



Serving our members so they can serve the community

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[Practice 360°](#) | [Courses and Trainings](#) | [Mentoring Resource](#)