DC BAR

# PRACTICE MANAGEMENT ADVISORY SERVICE

**May 2025**

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

### What to Know Before Entering a Law Firm Partnership

By Kaitlin E. McGee

Forming a law firm partnership is a bit like getting married, with shared goals, joint finances, and even the possibility of a messy breakup. Before signing on to such an important decision, it's worth asking yourself hard questions.

During our recent Lunch and Learn program on law firm partnerships, attorney Dave Ross of Garris Horn LLP covered what attorneys should consider before forming a partnership, and what to put in writing before things get serious. These insights apply whether you're starting fresh with a colleague or reevaluating an existing arrangement.

**Know What You're Looking For**

Do you want to grow your practice, share overhead, or tap into someone else's strengths? Or are you just afraid of doing it alone? Understanding your own motives, and whether they align with your potential partner's, is the first step toward building something that lasts.

**Compatibility Matters**

Even the best attorneys can clash when they have different working styles. One might be a meticulous planner. The other thrives on last-minute pressure. Talk about how decisions will be made, who manages what, and whether your client service philosophies align.

**Don't Skip the Business Plan**

Before you "tie the knot," take time to map out your shared vision. What's your plan for growth, staffing, revenue sharing, and future partners? A simple business plan or working draft of terms can clarify expectations and uncover deal breakers.

**Put It in Writing**

Your partnership agreement should address more than how you split the profit. Think about decision-making, dispute resolution, origination credit, and how to handle departures. Don't rely on handshake deals or online templates; this is worth doing right.

**Try Before You Buy**

Test the waters with a co-counsel arrangement or of counsel relationship. Working together before fully joining forces can help you assess compatibility without the full commitment.

**Ready to Talk It Through?**

If you're thinking about forming a partnership and want a sample business plan or help sorting through your ideas, contact us at PMAS@dcbar.org. We're here to help.

For more resources, visit our website.

See upcoming Lunch and Learn programs here.

**AI for Law Firms**

Have you used AI for marketing your law firm? If so, please email me at kmcgee@dcbar.org and share your experience and favorite AI tools.

Here is guidance on Attorneys' Use of Generative Artificial Intelligence in Client Matters, Legal Ethics Opinion 388.

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



**Basic Training & Beyond**

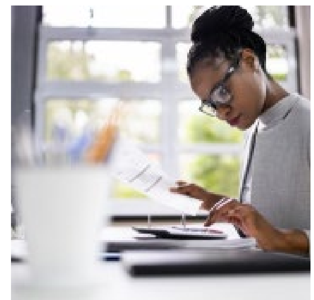
If you're starting a firm, Basic Training & Beyond is a great jumping-off point. Day One will teach you the essentials to get your firm off the ground, and Day Two will help you grow and manage your firm.

**Here is how to start, grow and manage a law firm in a large, urban market.**

Our monthly Basic Training & Beyond is set for **May 6 & 20, 2025,** from **9:15 a.m. to 4:30 p.m.** We will meet in person in the Williamson Conference Room on the third floor of Bar Headquarters. The program is presented monthly for members and law firm staff.

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

## Managing Money



### Managing Money

Our next in-person session of Managing Money is set for **June 16, 2025,** from **9:00 a.m. to 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 and Learn

**PMAS will also be collaborating with the Law Practice Management Community to bring you the following Lunch and Learn programs:**

- **May 8, 2025** – AI in Action: ChatGPT & Descript for Law Firm Marketing

*An LPM PMAS Production*

Register for any or all here.

## 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 on Zoom.

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 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.

### Resources

*Making a transition right now?*
Our Lawyer Assistance Program (LAP) has compiled these **Resources for Times of Change**.

**Upcoming Program: Mediation Mastery – Toolkit for Preparation and Negotiation Success**
**May 22, 2025 | 12:00–1:30 p.m. ET | Online | Free**
This 90-minute workshop will cover practical tips, checklists, and negotiation skills to help you and your client prepare for your next civil mediation. Learn proven tactics for resolution, mediation ethics, effective closing techniques, and more.

Presented by Constance Miller and hosted by the Multi-Door Dispute Resolution Division of the District of Columbia Superior Court. *Application for Virginia MCLE credit is pending.*

Register Here

**Networking Event: Solosez Bethesda Lunch**
**Thursday, May 8, 2025 | 12:00 p.m. | Hawkers, Bethesda**
Join Solosez Bethesda for an in-person networking lunch. Lawyers will share their best practice management tips, enjoy a casual discussion, and play a Bingo game with a prize for the winner.

**Topic:** What's the best practice management tip that worked for you?
RSVP by emailing innabrady@iblawfirm.com.

All lawyers are welcome—feel free to invite a colleague!

Our Video Resource Library offers free webinars on a variety of practice management topics. 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.

**Missed any of these recent sessions? You can access the recordings and materials anytime.**

Here's a glimpse of some recent sessions:

- **Law Firm Partnerships: What to Know Before and After Tying the Knot**
- **Lawyers & ADHD**

If you are interested in a practice management assessment, click here.

– Kaitlin & Dan

**In other news . . .**

For more tips on transitioning out of public service, read our **latest article in Duly Noted**.

For the recent results of the groundbreaking study on attorney mental health and well-being, **click here**.

Read the **LAP Winter Newsletter**.

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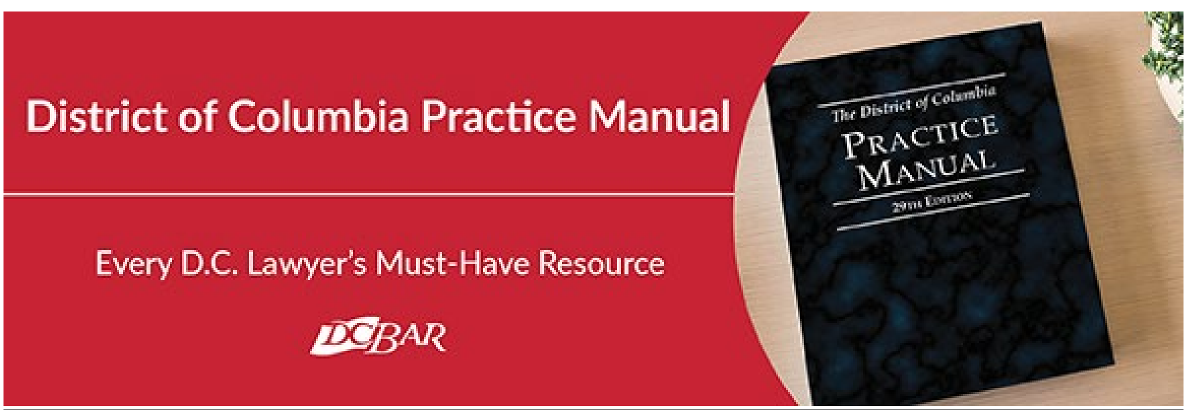
Practice Management Advisors have a free and confidential relationship with D.C. Bar members pursuant to Rule 1.6(j) of the D.C. Rules of Professional Conduct.




This two-volume title, typically priced at $495, is being offered to subscribers of this newsletter at a discounted rate of $450. To obtain the discount code, please reach out to communitiesregistration@dcbar.org.

Serving our members so they can serve the community

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