

July 2022

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



Practice 360 has moved to September 14, 2022

Practice 360 has been rescheduled to **September 14, 2022**. The event is in person at the D.C. Bar Headquarters. If you have already registered, your registration will automatically be transferred to the new date, and you don't need to do anything else. If you cannot participate on the new date, we will offer a full refund. We hope to see you this Fall.

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.

REGISTER NOW

Sponsored Event

Turn chaos into collaboration.
Work Together with netdocuments

Learn
More >

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@dcbbar.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 300 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

SCHEDULE A SESSION FOR
YOUR FIRM

Lunch & Learn Schedule

JULY 28

Vetting Technology with Sharon Nelson & John Simek of [Sensei Enterprises, Inc.](#) / Legal technology services promise the moon and sometimes deliver less. This session will focus on the process of selecting and vetting legal technology for your practice.

Webinar | [Register Now](#)

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.

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](#)

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@dcbbar.org.

And if you missed **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](#).

CALENDAR

July 2022

July 28

[Lunch and Learn: Vetting Technology](#)

Ethics

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: [Ethics Opinion 383](#)**.

In other news . . .

When you learn to empathize and relate to clients, you often realize that you also need to learn how to set and maintain boundaries. On Tuesday, July 12, the D.C. Bar [Lawyer Assistance Program](#) will explore why, when, and how to set firm, clear boundaries to help you take care of yourself, find a sense of control, and enhance your emotional well-being during this tumultuous time.

You can help guide the conversation by answering a [quick survey](#).

REGISTER

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

Other Resources

- [Courses and Trainings](#)
- [Get Advice](#)
- [Opening an IOLTA Account](#)
- [Practice Management Advisory Service - Law Firm Management Quiz \(Self Check\)](#)
- [Practice Tips and Compliance](#)
- [Practice Management Advisor Assessment](#)

Other Information

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](#).

Daniel M. Mills | dmills@dcbar.org | 202.780.2762
Kaitlin Forster | kforster@dcbar.org | 202.780.2764

Practice Management Advisory Service
District of Columbia Bar
901 Fourth Street NW
Washington, DC 20001



Serving our members so they can serve the community

901 4th St NW
Washington, DC 20001 USA
[202-737-4700](tel:202-737-4700)

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

This email was sent by: %%Member_Busname%%
%%Member_Addr%%, %%Member_City%%, %%Member_State%%,
%%Member_PostalCode%% %%Member_Country%%

[Update Email Preferences](#) [Unsubscribe](#)

This email was sent by: %%Member_Busname%%
%%Member_Addr%%, %%Member_City%%, %%Member_State%%, %%Member_PostalCode%%
%%Member_Country%%

[Update Email Preferences](#) [Unsubscribe](#)