

December 2024

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



Reconnect and Reflect This Holiday Season

by Kaitlin E. McGee

The end of the year can be a good time for reflection, but it's also a great opportunity to reconnect. The holidays offer a chance to nurture relationships with clients, colleagues, and referral sources while also setting the tone for the year ahead.

As you wrap up the year, consider these ways to strengthen your connections:

- **Send personalized holiday cards.** A handwritten message in a card can stand out in today's digital world. Use this as an opportunity to express genuine gratitude to your top clients, referral sources, and colleagues for their support over the past year.

- **Reconnect with former clients.** Reach out with a quick personal email or note wishing them a happy holiday season. Include an invitation to reach out if they have legal needs in the new year.
- **Host a small gathering.** Invite your closest clients or professional network for a holiday breakfast, happy hour, or even a quick virtual check-in to celebrate the season.
- **Give back to your community.** Engage in charitable activities, such as volunteering, sponsoring a local event, or donating in your firm's name. Pick a cause that aligns with your law firm's values and share your experience with your clients and network. This helps the community and reinforces your business vision.
- **Plan for next year's outreach.** Use this time to reflect on which marketing efforts have worked best. Where are your best clients coming from? Which relationships have led to growth? Have you thought about taking a referral source to lunch or dinner?

Reconnection lays the foundation for meaningful relationships that will support your law firm moving forward.

Take a moment to evaluate your successes this year and set clear, actionable goals for the next year. Whether you're improving your marketing, refining your operations, or building new client relationships, PMAS has resources to support you.

Explore the free courses and services available to D.C. Bar members on our [website](#), and make the most of this season to prepare for an even stronger year ahead.

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.

In [my Washington Lawyer column about AI](#), I break down what works, what doesn't, and how you can start integrating AI tools like ChatGPT into your daily workflow.

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.

A banner for LSP Data Solutions. On the left, a blue background features a green square outline containing the text "Trusted Experts. Tailored Solutions." in white and green. To the right, the LSP logo is displayed in white, with "DATA SOLUTIONS" in green below it. Further right, on a white background, the text "Forensics and eDiscovery services that fit your needs." is shown in blue. A green button with the text "LEARN MORE" in white is positioned at the bottom right.

Trusted Experts.
Tailored Solutions.

LSP
DATA SOLUTIONS

Forensics and
eDiscovery services
that fit your needs.

LEARN MORE

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 **December 3 & 17** 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 **December 9, 2024** 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.](#)

Managing Money

PMAS will also be collaborating with the [Law Practice Management Community](#) to bring you the following Lunch and Learn programs:

- **December 12, 2024** – Interested in Adding "Low Bono" Services to Your Practice?
- **January 9, 2025** – How Does a Law Firm Streamline Advertising for Effective Case Generation?

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

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:

- **Recruiting and Hiring 101: How to Get Started When You Need to Hire Help**
- **Five Ways to Use Email Effectively as a Marketing Tool** with Marketing Nice Guys
- **Set It and Forget It: LinkedIn for Busy Rainmakers** with Angela Dunz

More News from PMAS...

[Practice 360° Offers Attendees Strategies to Innovate in a Competitive Marketplace](#)

We hosted a [LinkedIn Lab for Lawyers](#) in August.

Kaitlin won the [vLex Award](#).

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 . . .

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

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:

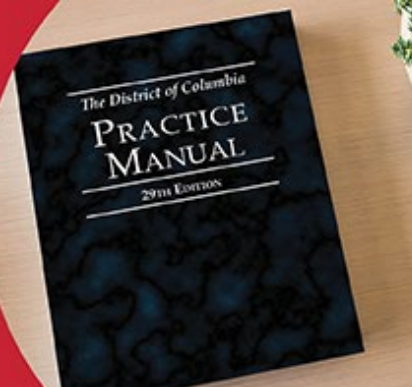
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Practice Management Advisors have a free and confidential relationship with D.C. Bar members pursuant to Rule 1.6(j) of the D.C. Rules of Professional Conduct.

District of Columbia Practice Manual

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



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