

December 2023

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



Looking Back to Look Forward

by Kaitlin E. McGee

At the end of the year, we can often get lost in the events surrounding the holidays and miss the opportunity to pause and take stock of the year.

- What went well this year?
- What did not go well this year?

It sounds simple, but taking some time to look back and assess what's working and what's not working in your firm can help you plan for the year ahead. You may even wish to conduct [your own annual review](#) where you set goals for the year ahead and chart out actionable steps needed to achieve those goals.

With regard to financial goals, looking back at your revenue and spending in the past year can give you an idea of how profitable your firm was this year and where you want to make changes for the year ahead. If you missed our recent Lunch and Learn presentation on budgeting, you can [find it here](#).

If you want to grow next year, what are you going to budget for marketing to make that growth possible? Where were your marketing dollars best spent last year? Where are your current best clients coming from?

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

My new favorite AI tool is [OpusClip](#), which takes video content you provide and turns it into short clips appropriate for posting on social media platforms. [Here's a clip](#) from our recent Lunch and Learn program that OpusClip generated using AI technology.

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

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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 a blue square containing the lowercase letters 'nd' in white, 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 scheduled for **December 5 and 19, 2023** from **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. The program is presented monthly for members and law firm staff.

[REGISTER HERE](#)

Over the past fourteen years, we have delivered this program on over three hundred occasions, reaching over 4,000 lawyers. Numerous participants have since established and effectively run small law firms. Our ongoing connections with these firms continuously shape and enrich the content of this program.

Lunch and Learn

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

- December 7 – [Lead Generation | How to Build a Steady Pipeline of New Clients](#)

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

Managing Money

[Managing Money](#)

Monday, December 4 | 9:00 a.m. – 12:30 p.m.

On December 4, 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 session of Managing Money is scheduled for **December 4, 2023, 9:00 a.m. – 12:30 p.m.**

Upon request, we offer the Managing Money program tailored for law firms or organizations.

[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.

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.

Missed any of these recent sessions? Access the recordings and materials anytime or visit our [video resource library](#).

- **Balancing the Lawyer Budget** with Jessica Medina
- **IDEA and School Advocacy: How to Effectively Advocate for a Child in Need of Specialized Instruction and Related Services** with Bill Jaffe
- **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

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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District of Columbia Practice Manual

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

DC BAR

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**PRACTICE
MANUAL**
2nd Edition

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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