

June 2022

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



Practice 360° on July 14, 2022

Registration has opened for this day-long, in-person event with practical programs for lawyers and law firms. Max Bevilacqua opens the day with **The Negotiator's Tool Kit – Improving Interpersonal Influence** followed by Elyse Schunkewitz with **Train Your Brain for Peak Performance**. The day will include a total of

fifteen programs, including two CLE programs, **The Ethics of Social Media-Attorney Advertising and the Investigative Uses of Social Media** with Hilary Gerzhoy and **Great Ways to Get Paid (Without Losing Your Law License)** with Dan Schumack and Seth M. Guggenheim. Attendance will be limited for this in-person only event, so register early to avoid the cut-off.

[**REGISTER NOW**](#)

Managing Money

On June 6, 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 in-person and Zoom session of Managing Money is set for June 6, 2022, 9:00 a.m. – 12:30 p.m.



[Register for an upcoming session or schedule a session for your firm here.](#)

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 June 8 & 15, 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 298 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.

Lunch & Learn Schedule

JUNE 9

[Working with Clients in Trauma: Serving Them, Protecting Yourself](#)

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 **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](#).

[Watch Lunch & Learn Recordings](#)

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 suits the lawyer. If you are interested in this approach to creating a law firm, contact PMAS@dcbbar.org.

[CONTACT US](#)

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

CALENDAR

June 2022

In other news . . .

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

June 6
[Managing Money](#)

June 8
[How to Start a Law Firm](#)

June 9
[Working with Clients in Trauma: Serving Them, Protecting Yourself](#)

June 15
[How to Grow a Law Firm](#)

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](#).

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](#).

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



Serving our members so they can serve the community