



# PRACTICE MANAGEMENT

ADVISORY SERVICE

## Practice 360° Newsletter

November 2021

### Calendar

#### Networking

Join us for Networking on Zoom following each Lunch and Learn session.

*(See schedule on the right.)*

#### COVID-19 Resources

[Coping During COVID-19: You Are Not Alone](#) (D.C. Bar, Lawyer Assistance Program)

[COVID-19 and Well-Being](#) (D.C. Bar, Lawyer Assistance Program)

[Well-Being Tips for Working at Home](#) (D.C. Bar, Lawyer Assistance Program)

[Bracing for the Unexpected: Disaster Preparedness for Lawyers](#) (D.C. Bar, Practice Management Advisory Service)

### Lunch and Learn

During the pandemic, our programs are available on Zoom.

All Lunch and Learn programs begin at Noon.

Register for any or all at [lunchandlearn@dcbars.org](mailto:lunchandlearn@dcbars.org)

#### November 4, 2021

*Tax Planning: Top 7 Things You Can Do Before Year End*

[Register](#)

#### November 18, 2021

*A Higher Bar: How to Exceed Client Expectations in a Virtual World*

[Register](#)

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@dcbars.org](mailto:lunchandlearn@dcbars.org).

And if you missed *Protect Your Law Firm from the Biggest Security Threats of 2021* with Tom Lambotte, *What Small Firm Lawyers Need to Know*

[Quick Start Guide to Launching a Firm During the Pandemic](#) (D.C. Bar, Practice Management Advisory Service)

[New Law Firm Quick Start Technology Guide](#) (D.C. Bar, Practice Management Advisory Service)

[Working Remotely During the Pandemic: A Guide to Bar Member Benefits](#) (D.C. Bar, Practice Management Advisory Service)

[Legal Ethics in the Age of Coronavirus](#) (D.C. Bar, Legal Ethics Program)

[Link to other D.C. Bar Covid-19 Resources](#)

## PMAS Events

### November 2021

**November 1** – Successful Small Firm Practice Course (Monday session, *Day 7 of 8*)

**November 3** – *Day 1 of Basic Training & Beyond*

**November 4** – *Tax Planning: Top 7 Things You Can Do Before Year End*

**November 8** – Successful Small Firm Practice Course (Monday session, *Day 8 of 8*)

**November 10** – *Day 2 of Basic Training & Beyond*

**November 18** – *A Higher Bar: How to Exceed Client Expectations in a Virtual World*

## Ethics

Here is new ethics guidance on **Lawyer-Directors**

*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 other programs this year, here are the [recordings and materials](#).

## 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 November 3 and 10 (9:15 a.m. – 4:30 p.m.) We will meet by Zoom videoconference. [Register here](#).

This program has been presented 284 times for more than 4,000 lawyers over the last thirteen years and many have launched and are operating small law firms. We keep in touch with many small firms and what we learn informs the content for this program.

## Managing Money

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.

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

## PMAS Links and Free Downloads

**Representing Entity-Clients**, [Legal Ethics Opinion 382](#).

## Other Events

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

[Continuing Legal Education programs](#)

[Communities Events](#)

[Pro Bono Center training programs](#)

[Law Firm Management Assessment \(Self-Check\)](#)

[Small firm legal trends and compensation reports](#)

[e-Manual for Basic Training & Beyond](#)

[More PMAS programs](#)

## From Dan's Desk

### Do you provide subscription legal services?

If you do, would you be interested in presenting a [Lunch and Learn](#) program about your system? Not many lawyers work in this manner however it can work very well for the lawyer and client in the right situation. [This article on the Clio blog describes it well](#). [Kim Bennett](#), a trademark and business strategy lawyer in Pennsylvania, gave a great presentation on the subscription model at the Clio Cloud Conference recently. If you are interested in helping organize and present such a program, contact me at [dmills@dcbbar.org](mailto:dmills@dcbbar.org).

-- Dan



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District of Columbia Bar, 901 4th St NW, Washington, DC 20001