

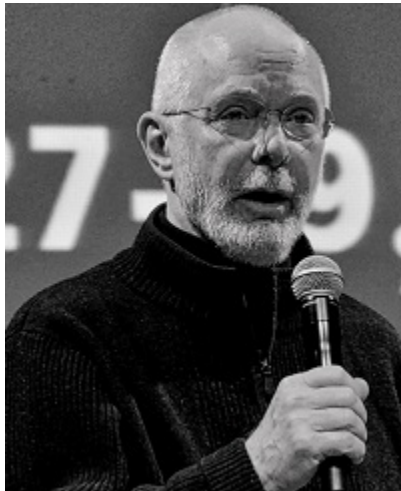


PRACTICE MANAGEMENT

ADVISORY
SERVICE

Practice 360° Newsletter January 2022

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



Daniel M. Mills



Kaitlin Forster

What is a law firm assessment?

We are frequently asked, “What’s a law firm assessment, and why should I do that?” An assessment is like a physical exam for your law firm. Pre-pandemic, practice management advisors would go into the law firm, interview everyone, review all processes, and give feedback to the owners about what they are doing correctly and where they need improvement. These days, we conduct the interviews on Zoom after the owner completes a 15-page assessment questionnaire.

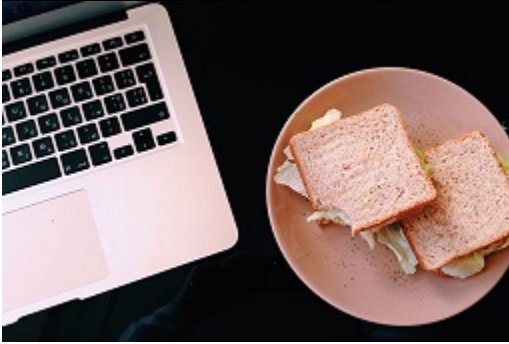
With many firms conducting some or all their work remotely, we focus on the firm’s infrastructure and processes. We do not get into substantive legal work or give legal advice. From time to time, we identify weak areas to which owners are not sensitive and discuss potential solutions.

The assessment is free for D.C. Bar members and confidential. Under Rule 1.6(j) of the D.C. Rules of Professional Conduct, our communication with members is confidential. When we are asked for a report, it is only made to firm owners. To inquire about an assessment for your firm, whether you are solo or have many owners, associates, and staff, contact us at PMAS@dcbar.org.

-- Kaitlin and Dan

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Practice Management Advisory Service
District of Columbia Bar

Lunch and Learn



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@dcbar.org.

All Lunch and Learn programs begin at Noon on Zoom.

Register for any or all at lunchandlearn@dcbar.org

January 6, 2022

Are You Lawyering or Laboring? 7 Steps to Reduce Interruptions & Chores and Run a Highly Productive Law Firm with Maddy Martin of Smith.ai

Register

January 13, 2022

How to Detect, Mitigate and Respond to a Cyber Attack with Rob Saland of Qomplx.com

Register

January 20, 2022

Next Level Online Oral Communication & Advocacy Skills with Christine Clapp and Michele Morrissey of [Spoken with Authority](#)

Register

And if you missed *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 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 January 12 and 19 (9:15 a.m. – 4:30 p.m.)

We will meet by Zoom videoconference. [Register here](#).

This program has been presented 288 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 Calendar

January 2022

January 6 – *Are you Lawyering or Laboring? 7 Steps to Reduce Interruptions & Chores and Run a Highly Productive Law Firm*

January 12 – *Day 1 of Basic Training & Beyond*

January 13 – *How to Detect, Mitigate and Respond to a Cyber Attack*

January 19 – *Day 2 of Basic Training & Beyond*

January 20 – *Next Level Online Oral Communication & Advocacy Skills*

PMAS Links and Free Downloads

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

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

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

[More PMAS programs](#)

Ethics

Here is new ethics guidance on **Lawyer-Directors 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](#)

COVID 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)

[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](#)

D.C. Bar Practice Management Advisory Service | 202-737-4700



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