



PRACTICE MANAGEMENT

ADVISORY
SERVICE

Practice 360° Newsletter

Calendar

Networking

Thursday, January 9, Noon, *Increasing Revenue and Reducing Expenses in Your Practice*, presented by Geoff Gilbert of [Coach for Executives](#). The D.C. Bar, 901 Fourth Street NW, Washington, DC
RSVP to lunchandlearn@dcbar.org

Friday, January 10, 12:30 p.m., Alto Fumo, 2909 Wilson Boulevard, Arlington, VA (Clarendon Metro)
RSVP to steven@stevenkriegerlaw.com

Friday, January 31, Noon, Barrel & Crow, 4867 Cordell Ave., Bethesda, MD (Bethesda Metro)
RSVP to mark@markdelbianco.com

Law is a relationship business. Bring cards to share. Do RSVP so you will be notified of any event

Lunch and Learn

All programs begin at Noon. You may attend in person or by video conference. Register for any or all at lunchandlearn@dcbar.org

January 9, 2020
Increasing Revenue and Reducing Expenses in Your Practice, presented by Geoff Gilbert of [Coach for Executives](#).

Most lawyers (and businesses) focus too much on expenses and not enough on increasing revenue. Learn how to balance your efforts so revenues far outgrow expenses.

Register

January 16, 2020
Running on Empty: Burnout in the Legal Profession, presented by Niki Irish of the [D.C. Bar Lawyer Assistance Program](#).

The World Health Organization defines burnout as a syndrome "resulting from chronic workplace stress that has not been successfully managed." The primary symptoms include persistent exhaustion, feeling negative towards one's career, and reduced productivity. Does this speak to you? If so, please join us for a discussion exploring the concept of burnout and its effects on the mind, body and relationships, and gain a better understanding of the strategies to prevent, respond to and recover from it.

Register

February 6, 2020
Buh Bye Revolving Door: 5 Tips to Tame Turnover Troubles, presented by Dina Eisenberg of [OutsourceEasier](#).

updates.

PMAS Events

January 9 – Lunch and Learn, *Increasing Revenue and Reducing Expenses in Your Practice*

January 15 – Day 1 of Basic Training & Beyond

January 16 – Lunch and Learn, *Running on Empty: Burnout in the Legal Profession*

January 25 – Saturday session of Basic Training & Beyond

January 29 – Day 2 of Basic Training & Beyond

Ethics

New ethics guidance on **Duties When a Lawyer is Impaired.** [Legal Ethics Opinion 377](#)

Mandatory Arbitration Provisions in Fee Agreements. [Legal Ethics Opinion 376](#)

What are the ethical implications of crowdfunding a legal representation? Read [Legal Ethics Opinion 375](#) for guidance.

What are your obligations to a prospective client? Read [Legal Ethics Opinion 374](#) to find out.

Have you read the Legal Ethics Opinions on *social media and lawyers?* [Legal Ethics Opinion 370](#)
[Legal Ethics Opinion 371](#)

You've lost 3-4 paralegals or associates this year and you don't know why or what to do about it. Is it them or is it you? Find out and get advice on how to retain your employees from Onboarding Mentor, Dina Eisenberg.

Register

The *Lunch and Learn Series* is [here](#). New programs are added regularly. Recaps and materials from recent programs are [here](#). If you have an idea for a program, let us know at: lunchandlearn@dcbar.org

If you missed *Clearing Clutter, Tuning in to Time, Space & Mind* with Niki Irish & Tracy Huang, [here's the recording](#).

If you missed *Help I Have No Time for Marketing (Holiday Edition)*, presented by Mary Ellen Hickman, [here's the recording](#).

Basic Training & Beyond

Our monthly [Basic Training & Beyond](#), is set for January 15 and 29 at 9:15 a.m. – 4:30 p.m. A Saturday version of the two-day program is set for January 25, 2020.

Register at BasicTraining@dcbar.org

This program has been presented 239 times for more than 3,000 lawyers over the last twelve 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.

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](#)

Other Events

[Continuing Legal Education programs](#)

[Communities Events](#)

[Pro Bono Center training programs](#)

From the Desks of Dan and Rochelle



I'm talking to established D.C. small firms about their reaction to the **Legal Trends Report** by Clio for 2019. Clio, a [Bar member benefit for case management](#), surveys its client base annually. The reactions from D.C. lawyers will be in a column in the *Washington Lawyer* in the spring. What's apparent is that successful firms have a well thought out and flexible process for onboarding a new client. Clio found that the prospective client who contacts a firm expects a timely response, good information, a clear understanding of how to proceed, a sense of cost and what the full process looks like. That's a lot of expectation for the lawyer to deliver in a short amount of time. Local lawyers prefer to talk by phone the same day a prospective client contacts the firm and at least within 24 hours. They want to hear how the prospective client describes the issue and they want to make sure the potential fee matches the person's ability to pay. If the phone call goes well, an initial consultation is set. Some charge for this face-to-face meeting, some don't. If the meeting goes well, the fee agreement is created, the advance fee collected, and work begins. What's clear is that these D.C. firms have a well-defined onboarding process that meets the needs of the prospective client. A well-handled telephone process and good people skills are key to this onboarding. [You can get your copy of this fascinating report here.](#) Onboarding data starts at page 26.

--Dan

It's a new year and an opportunity for you to refresh and reset! Clearing clutter is a great way to start. Consider and review your current caseload to determine which cases/clients are negatively impacting your practice. No matter how well you try to vet cases/clients before commencing representation, lawyers often find themselves handling matters that are draining their time and resources with little benefit to your firm's financial bottom line. You may have a difficult client causing you stress, a dormant matter that could fall through the cracks, or a client that hasn't paid causing you to work harder and earn less. Review your caseload to determine which you can get rid of to allow you to have a more productive year. Refer to Rule 1.16 for guidance on the issue of terminating the attorney-client relationship and get [ethics guidance](#). If the case is in litigation you must also follow the applicable court rules to obtain approval from the judge before you can withdraw from the case and end the attorney-client relationship. For questions or assistance on how to manage your practice, contact pmas@dcbar.org. Wishing you a productive and profitable new year!

--Rochelle

Dan & Rochelle

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