

**May 2023**

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



**AI in Small Firm Life**

**by Kaitlin E. McGee**

Even with the increasing prevalence of AI in the news these days, I've found that many attorneys still have never used most AI tools. For example, during a recent session of Basic Training, I asked a room of eight attorneys how many of them have used ChatGPT even once, and one person raised their hand. From there, I realized that the first step to talking about AI was actually showing lawyers how it works – only then could we explore the possibilities and limitations of AI technology within a law firm.

Some of the ways we discussed using AI in a small firm setting included:

- When a lawyer speaks multiple languages, using ChatGPT to translate content from their website and blog, which they could then edit to ensure accuracy.
- Using [Descript](#) to transcribe your video footage automatically so you can edit it just like a word document.
- Using [Canva](#) for design work for your law firm.
- Trying [CoCounsel](#) by Casetext for legal research, deposition preparation, or contract analysis.

If you are using AI in your firm, let us know how at [pmas@dcbar.org](mailto:pmas@dcbar.org).

If you want to learn more about AI, join us May 2 at noon for our Lunch and Learn session, [The Rise of AI in the Legal Profession: Lawyers brace for Impact](#). You can find details below.

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. To schedule a one-on-one meeting with us, email [pmas@dcbar.org](mailto:pmas@dcbar.org). For courses and trainings we offer free to D.C. Bar members, visit our [website](#).

## 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.

Our monthly [Basic Training & Beyond](#) is set for **May 2 & 16, 2023 / 9:15 a.m. – 4:30 p.m.** We will meet in-person in the Williamson Conference Room on the third floor of D.C. Bar headquarters. Attendees must comply with these [protocols](#) to enter the building. The program is presented monthly for members and law firm staff.

[REGISTER HERE](#)

This program has been presented more than three hundred 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.

## Managing Money

### [Managing Money](#)

**Monday, June 12 | 9:00 a.m. – 12:30 p.m.**

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 set for June 12, 9:00 a.m. – 12:30 p.m.

We also present Managing Money on request for a law firm or organization.

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

[Register Now](#)

## Lunch and Learn

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

- **May 4** – [The Rise of AI in the Legal Profession: Lawyers Brace for Impact \(Sponsored by NetDocuments\)](#)
- **May 11** – [Freelance Lawyer Freedom: How to Create a Lucrative, Flexible, and Rewarding Business as a Freelance Attorney](#)

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

## Successful Small Firm Practice Course

### We have launched the Successful Small Firm Practice Course in a new way...

Are you interested in a business incubator approach to growing your law firm?

Consider this course, which has been a staple for several years as a series of multi-session programs focused on starting and growing a firm with attendees creating work product for the firm. Now we offer the course 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 that suits the lawyer. Lawyers work through their business and marketing plans and have built-in accountability for achieving their business goals.

If you are interested in this approach to creating and growing a law firm, contact [omas@dcbar.org](mailto:omas@dcbar.org).

## Resources

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](mailto:lunchandlearn@dcbar.org)

Missed any of these recent sessions? [Access the recordings and materials anytime.](#)

- **Law Firm Compensation & Bonuses: Planning for 2023** with Brenda Barnes and Camille Stell
- **Stop Wasting Time on Tire-Kickers and How to Create Standard Operating Procedures (SOPs) That Save Time and Money in Your Law Practice** with David Skinner and Karen Dunn Skinner
- **Take a Tour of MyCase** with Valerie Amparan
- **Modern Business Development: Winning Clients & Talent Online** with Sameena Kluck
- **Thriving Not Just Surviving: Boundary Setting in Practice** with Niki Irish and Sharon Greenbaum

## 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

## In other news . . .

Here is the Lawyer Assistance Program [Dispatch](#) newsletter for the Winter.

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

Here is new ethics guidance on Restrictions on Accepting a Legal Fee For Benefit of Certain Incarcerated Persons Before Notifying Prior Counsel of Record: [Legal Ethics Opinion 384](#)

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:**

Kaitlin E. McGee / [kmcgee@dcbar.org](mailto:kmcgee@dcbar.org) / [202-780-2764](tel:202-780-2764)

Daniel M. Mills / [dmills@dcbar.org](mailto:dmills@dcbar.org) / [202-780-2762](tel:202-780-2762)

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.

**NOW UPDATED**

**District of Columbia Practice Manual**

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

**DCBAR**



Normally priced at \$495, this two-volume title is available to subscribers of this newsletter for \$450. Please contact [communitiesregistration@dcbar.org](mailto:communitiesregistration@dcbar.org) for a discount code.



Serving our members so they can serve the community

901 4th Street NW  
Washington, DC 20001 USA  
[202-737-4700](tel:202-737-4700)

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

This email was sent by: District of Columbia Bar  
901 4th Street NW, Washington, DC, 20001 United States

[Update Email Preferences](#)

[Unsubscribe](#)