



PRACTICE MANAGEMENT

ADVISORY
SERVICE

Practice 360° Newsletter

February 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

Due to the pandemic, key Bar services, including PMAS programs, are currently only available online via videoconference.

All Lunch and Learn programs begin at Noon.

Register for any or all at lunchandlearn@dcbar.org

February 4, 2021

Innovative Marketing in the COVID-19

Era, presented by Sharon Nelson and John Simek of [Sensei Enterprises](#)

Register

February 18, 2021

Top Tax Savings Strategies in 2021, presented by Kim Bey of [Bey & Associates CPAs PC](#)

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

[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

February 2021

February 3 – Day 1 of Basic Training & Beyond

February 4 – Lunch and Learn: *Innovative Marketing in the COVID-19 Era*

February 10 – Day 2 of Basic Training & Beyond

February 18 – Lunch and Learn: *Top Tax Savings Strategies in 2021*

Ethics

Here is new ethics guidance on **Attorneys' Charging Liens and Client Confidentiality**. [Legal Ethics Opinion 379](#)

Other Events

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.

And if you missed *How to Market Your Firm in Challenging Times* with Mary Ellen Hickman; *A Day in the Life of a Litigation Attorney* with Margeaux Thomas; *Affordable Tools, Tech, and Talent to Run a Small Law Firm Remotely* with Maddy Martin; *Overcoming the Crisis: How to Retool your Marketing to Stay Connected and Relevant* with Mary Ellen Hickman; *Running on Empty: Burnout in the Legal Profession* with Niki Irish; *Clearing Clutter, Tuning in to Time, Space & Mind* with Niki Irish & Tracy Huang; Mary Ellen Hickman on *Help, I Have No Time for Marketing*; *Security for Lawyers Working Remotely* with Sharon Nelson and John Simek; or *Conducting Video Depositions Using Zoom* with Sundeep Hora and Nathan Finch 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 February 3 and 10 (9:15 a.m. – 4:30 p.m.) We will meet by Zoom videoconference. [Register](#) [here](#).

This program has been presented 268 times for more than 3,900 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](#)

[Continuing Legal Education programs](#)

[Communities Events](#)

[Pro Bono Center training programs](#)

[More PMAS programs](#)

From the Desks of Dan and Rochelle



Lawyer Wellness

Lawyer wellness is always a relevant topic and now it is even more important. The current state of our nation's health is in flux and this brings uncertainty, fear, and anxiety for us all. Please take the time to care for yourself as you endeavor to keep your practice afloat. Some of you are struggling to maintain your firm and your livelihood. With this challenge comes great stress. Others have managed to adapt to the "new normal." You are video conferencing with clients and the courts, you have downsized your office space and learned new ways to run your firm more efficiently. With these changes and sudden adaptations, you may have forgotten to take care of yourself. Regardless of the status of your practice, the demands professionally and personally are immense. Our [Lawyer Assistance Program \(LAP\)](#) is here to help. Do not hesitate to reach out. As lawyers we are used to helping others solve their problems, but today, you and your mental health must take precedence. You can only be as good for someone else as you are for yourself. For more information on assistance and support groups contact LAP [here](#).

-- Rochelle

TrustBooks Adds the Operating Account

If you have longed for an easy way to keep track of both your trust account and operating account without having to learn the complexities of QuickBooks or Excel, give [TrustBooks](#) a look. It's easy to learn, uses lawyer terminology rather than accounting terminology, and lets you keep accurate track of advance fees and how they are earned. I was able to get quickly up-to-speed with most features of TrustBooks in a few hours and was able to use it to illustrate a manual for a new course we will soon be offering on financial management for law firms. TrustBooks also integrates with LawPay and Clio. Here is an [independent review](#) from

2020 before the operating account feature was added this year. Here's [Bob Ambrogio's review](#) from last month.

-- Dan

Dan & Rochelle

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