

**April 2023**

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



**Don't Fear the Robot**

**by Kaitlin E. McGee**

After attending the ABA TechShow last month and learning about the new tools available to lawyers, I'm more convinced that advancements in technology, including artificial intelligence (AI), offer more potential than problems for the solo and small-firm attorney.

Utilizing AI in the management of the firm can dramatically increase efficiency. AI technology can automate tasks that are time-consuming for attorneys, such

as document review, legal research, and contract analysis. This means that solo attorneys and small firms can handle a higher volume of cases with fewer resources, which can lead to increased profits and productivity. The ability of AI to quickly generate letters and pleadings and perform time-consuming legal research and review tasks is impressive.

However, as with outsourcing tasks to any staff member on your team, there are risks associated with outsourcing to a robot. It's important to review AI-generated work, check for errors, and ensure that you agree with the conclusions, findings, and final work product you receive. For example, ChatGPT has been known to manifest case names and citations that don't exist to support a legal position. This is not something you want to discover after submitting a pleading to a Court.

If you haven't used ChatGPT in your practice, try asking it to:

- Draft a cover letter for you,
- Summarize a longer article,
- Turn an article you wrote into a social media post,
- Brainstorm potential responses to an email, letter, or text message, or
- Improve or revise a piece of your writing.

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

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 next monthly [Basic Training & Beyond](#) is set for **April 18 and 25, 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, 2023, 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](#)

## 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 [PMAS@dcbar.org](mailto:PMAS@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](#).

Clio is holding a [Solo and Small Firm Virtual Summit](#) on April 18 from 11:30 a.m. to 4:45 pm ET. It's a free, half-day event focused on how you can do more with less. Learn more and register [here](#). Clio is a [D.C. Bar member benefit](#).

- 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:**

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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.



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