

February 2024

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



Your Backup Plan

by Kaitlin E. McGee

What would happen today if you woke up, walked outside, and got hit by a bus on the way to work? While it's admittedly a morbid thought, and you might initially be thinking about all the injuries you would sustain from the blow, have you thought about what would happen to your clients and the cases that you're working on right now?

Do you have a backup plan? Many solo attorneys don't.

Dan and I frequently get phone calls from attorneys who tell us that their malpractice insurance company is asking them to name their backup attorney. They tell us they don't have a backup attorney, and many attorneys have never even thought about the idea. Some are stumped as to how to find such an attorney, and others are incredulous that such a requirement exists. While it may initially seem unnecessary, having a contingency plan is a crucial element of responsible practice management.

Having a backup plan is necessary to deal with emergencies, but it can also be beneficial in the event of planned absences. Balancing the demands of your law firm with personal commitments, such as vacations or family-related events, becomes much smoother when you have a reliable backup in place.

For solo attorneys, one effective approach is to collaborate with another solo attorney who shares the need for a backup. Establishing a reciprocal arrangement can be mutually beneficial, providing peace of mind for both attorneys. If you already have someone you occasionally rely on, now is the perfect time to formalize your agreement in writing.

Consider the following steps to ensure you have a comprehensive backup plan:

1. **Identify a Reliable Backup Attorney:** Look for a trustworthy attorney who understands your practice and is willing to step in if needed.
2. **Formalize the Arrangement:** Document your backup agreement in writing, outlining the responsibilities, terms, and expectations of both parties. This not only clarifies the arrangement but also serves as a reference in case of any unforeseen circumstances (*Contact PMAS for a sample*).
3. **Communication is Key:** Keep open lines of communication with your backup attorney. Ensure they are familiar with your ongoing cases, client contacts, and any specific procedures unique to your practice.
4. **Stay Proactive:** Periodically review and update your backup plan. As your practice evolves, so might your needs and potential backup candidates.

PMAS has a sample Agreement for Emergency Backup Services. If you would like to get a copy of the sample agreement, email 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. For courses and resources we offer free to D.C. Bar members, visit our [website](#).

AI for Law Firms

Last month, Ed Walters from [Fastcase/vLex](#) gave us a sneak peek at their new AI legal research and writing tool, [Vincent AI](#). If you missed the program, you can [watch it here](#).

If you are using AI in your firm, let us know how at PMAS@dcbar.org.



AI Responsibly with 

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.

Here is how to start, grow and manage a law firm in a large, urban market. Our monthly [Basic Training & Beyond](#) is set for **February 6 & 20, 2024, from 9:15 a.m. – 4:30 p.m.** We will meet in-person in the Williamson Conference Room on the third floor of Bar Headquarters. The program is presented monthly for members and law firm staff.

This program has been presented more than three hundred times for more than 4,000 lawyers over the last fifteen years, and many have launched and are now operating small firms. We stay connected with many small firms, and what we learn informs the content for this program.

Lunch and Learn

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

- **February 8** – Create an Amazing LinkedIn Profile

PMAS will also be collaborating with the Law Practice Management Community to bring you the following Lunch and Learns.

- **February 15** – Hire.Acquire.Inspire: How to Build a Growing and Thriving Law Firm
- **March 7** – Team Building – When the Team is Remote

An LPM & PMAS Production

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

Managing Money

Managing Money

Thursday, March 21 | 9:00 a.m. – 12:30 p.m.

Attend in person on March 21 to 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 of business account.

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.](#)



Successful Small Firm Course

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

Consider working with us on an individual basis. We now offer the Successful Small Firm Practice Course in a series of one-on-one sessions.

The Course serves as an incubator for solo attorneys and small firms and helps them work through their business and marketing plans with support, feedback, and guidance. Lawyers focus on the type of firm they want to create and work through the Course at their own pace with 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.

Resources

Explore our [video resource library](#) where new programs are regularly added. Our complete archive of recordings and materials is available [here](#). If you have an idea for a program, let us know at: lunchandlearn@dcbar.org.

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

Here's a glimpse of some recent sessions:

- **Sneak Peek at the New Fastcase/vLex Generative AI Tool, Vincent AI** with Ed Walters
- **Lead generation | How to Build a Steady Pipeline of New Clients** with Marketing Nice Guys
- **Balancing the Lawyer Budget** with Jessica Medina
- **IDEA and School Advocacy: How to Effectively Advocate for a Child in Need of Specialized Instruction and Related Services** with Bill Jaffe
- **Discover Smokeball: The Legal Practice Management Solution for DC Lawyers**
- **Dealing with Law School Debt** with Jessica Medina

More News from PMAS

Read our [Duly Noted](#) blog post on how to jumpstart your marketing.

[Contact us](#) if you are interested in a practice management assessment.

– Kaitlin & Dan

In other news . . .

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

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

Here is new ethics guidance on **Serving as Local Counsel for a Matter Being Litigated in a District of Columbia Court: [Legal Ethics Opinion 387](#)**

For more information on PMAS programs, [click here](#).

CLE, Communities Events & Pro Bono:

[CLE is going to Portugal.](#)

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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District of Columbia Practice Manual

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

DC BAR

The District of Columbia
**PRACTICE
MANUAL**
2nd Edition

This two-volume title, typically priced at \$495, is being offered to subscribers of this newsletter at a discounted rate of \$450. To obtain the discount code, please reach out to communitiesregistration@dcbar.org.



Serving our members so they can serve the community

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