

**November 2023**

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



**"Fix That!"**

**by Kaitlin E. McGee**

When it comes to turning leads into clients, how fast does that conversion happen at your firm? If someone called you right now, when would you be able to schedule them for an initial consultation? Within a day? A week?

Last month at Practice 360°, Conrad Saam presented a fascinating program on advanced marketing techniques and explained the concept of **sales velocity** as it relates to law firms. Essentially, **the faster you are able to make a decision about something, the more likely you are to buy something**. So if it's taking four days, or more, to get a potential client scheduled for an initial consultation, that's four days for them to change their mind and choose someone else.

[Watch Conrad's response](#) to the question from an attorney about what to do at a busy firm where only one lawyer handles new client consultations and they are booked 7 to 14 days out.



### Think about your own client intake process:

- Who's answering your phones? (Hint: someone other than voicemail should be doing this)
- How long does it take to call back a client?
- How long does it take for a new client to schedule an initial consultation?
- What percentage of new clients who call your firm sign a fee agreement and retain you?
- What are you missing out on? What could you improve?

In the end, you can have fantastic marketing and still not be growing if you aren't responsive to your new leads. You may not even know how many new clients you're missing out on. Clients value responsiveness, so make sure *someone* is getting back to your new potential clients quickly and effectively and scheduling them for a consultation as soon as you're available.

Whether you are starting a firm from scratch or growing and managing an existing firm, the D.C. Bar Practice Management Advisory Service (PMAS) has resources to help you create and meet your business goals. For courses and resources we offer free to DC Bar members, visit our [website](#).

### AI for Law Firms

Ed Walters joined us last month at Practice 360° to talk about [how to responsibly use AI in legal research](#). Fastcase, the D.C. Bar member benefit for (free) legal research, recently merged with [vLex](#), and the new options for legal research are evolving quickly.

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

Sponsored Advertisement



AI Responsibly with  nd MAX

## 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 **November 14 & 28, 2023 / 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.

[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 attendees have launched and are successfully operating small law 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:

- November 16 – [Balancing the Lawyer Budget](#)
- December 7 – [Lead Generation | How to Build a Steady Pipeline of New Clients](#)

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

## Managing Money

### [Managing Money](#)

**Monday, December 4 | 9:00 a.m. – 12:30 p.m.**

On December 4, 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 **December 4, 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 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 can 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](mailto:PMAS@dcbar.org).

## Resources

Our Video Resource Library is [here](#). New programs are added regularly. Our full archive of recordings and materials is [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 or visit our [Video Resource Library](#).**

- **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

- **Law Firm Liability Exposures: How to Protect Your Firm Against Cyber Liability Claims** with Mark Lefever of USI Affinity
- **Powerful Marketing Tactics for Small Law Firms: How to Attract More of the Right Clients** with Mary Ellen Hickman
- **Freelance Lawyer Freedom: How to Create a Lucrative, Flexible, and Rewarding Business as a Freelance Attorney** with Sonrisa Lewis, Esq.

## More News from PMAS

Read our [Duly Noted](#) blog post on how to jump start 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 the Spring/Summer.

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

Here is new ethics guidance on **Advising Clients about Communications with Represented Opponents**: [Legal Ethics Opinion 385](#)

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**

The District of Columbia  
**PRACTICE  
MANUAL**  
29th Edition

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](#)