

January 2025

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



Decluttering and Organizing Your Digital Files

by Kaitlin E. McGee

The start of a new year is a great time to declutter and organize your digital files. An organized client file system can improve efficiency at your law firm.

Step 1: Review Your Fee Agreement

What does your fee agreement say about how long you'll keep client files? More importantly, what do you want it to say? Including clear file retention policies in

your fee agreements sets expectations and helps avoid disputes.

Step 2: Ethical Guidance for File Management

Review Legal Ethics Opinions [283](#) and [357](#) for guidance on maintaining and disposing of client files:

- **Retention timelines:** Specify in your fee agreement how long you'll keep client files after representation ends. Offer to return or provide copies when the representation is over.
- **Safeguard valuable property indefinitely:** Original documents like deeds, wills, and settlement agreements must be preserved or returned to the client.
- **Five-year retention rule:** For non-valuable records not needed to protect client interests, you may destroy them after five years if the client cannot be contacted or does not respond ([283](#)).

PMAS Tip: While you can dispose of client files after a set period with client agreement (and excluding items of intrinsic value), there's no statute of limitations for Bar complaints in D.C. Consider keeping a digital copy of each file indefinitely in a searchable format.

Keeping an Organized File System

To keep your files organized, make sure your files follow a clear and organized system.

- **Export and organize emails and texts.** Microsoft Outlook or Gmail allow you to save client communications as searchable PDFs. Also explore [Google Takeout](#) and bulk saving options for Outlook to keep a backup record of all email communications. Programs like [iMazing](#) can help you export text messages into a searchable PDF format.
- **Standardize your file naming conventions.** The most important rule with dates is to begin with the year first, then the month, then the day, in a **YYYY-MM-DD** or **YYYYMMDD** format. This keeps your files in

chronological order on an alphabetized list. Keep names short and standardize your abbreviations.

- **Archive closed cases.** Move inactive files to a separate archive to keep your active files uncluttered.

By decluttering your digital files and refining your processes now, you'll set yourself up for a smoother, more productive 2025. For more resources and free programs available to D.C. Bar members, visit our website.

Explore the free courses and services available to D.C. Bar members on our [website](#), and make the most of this season to prepare for an even stronger year ahead.

AI for Law Firms

Have you used AI for marketing your law firm? If so, please email me at kmcgee@dcbar.org and share your experience and favorite AI tools.

In [my Washington Lawyer column about AI](#), I break down what works, what doesn't, and how you can start integrating AI tools like ChatGPT into your daily workflow.

Here is guidance on [Attorneys' Use of Generative Artificial Intelligence in Client Matters, Legal Ethics Opinion 388](#).

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



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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 **January 7 & 28** from **9:15 a.m. to 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.

Managing Money

[Managing Money](#)

Our next in-person session of Managing Money is set for **March 10, 2025** from **9:00 a.m. to 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.](#)



Lunch and Learn

PMAS will also be collaborating with the [Law Practice Management Community](#) to bring you the following [Lunch and Learn programs](#):

- **January 9, 2025** – How Does a Law Firm Streamline Advertising for Effective Case Generation?
- **January 23, 2025** – Cyber Liability Exposures for Law Firms

An LPM & PMAS Production

Register for any or all [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 on Zoom.

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

Our [video resource library](#) offers free webinars on a variety of practice management topics. 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

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

Here's a glimpse of some recent sessions:

- **Recruiting and Hiring 101: How to Get Started When You Need to Hire Help**
- **Five Ways to Use Email Effectively as a Marketing Tool** with Marketing Nice Guys
- **Set It and Forget It: LinkedIn for Busy Rainmakers** with Angela Dunz

If you are interested in a practice management assessment, [click here](#).

– Kaitlin & Dan

In other news . . .

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

LAP published its [Winter Dispatch](#).

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](#).

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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.

District of Columbia Practice Manual

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



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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