

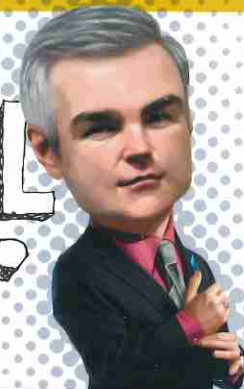
Jan/Feb 2020

MARC WHITEHEAD & ASSOCIATES
ATTORNEYS AT LAW, LLP
A NATIONAL DISABILITY CLAIMS LAW FIRM

Vol. 6

Issue: 01

THE NEWSLETTER YOU'VE BEEN WAITING FOR... Successful Barrister



"MARKETING, MANAGEMENT & LIFE SKILLS THAT PROBABLY WON'T GET YOU DISBARRED"

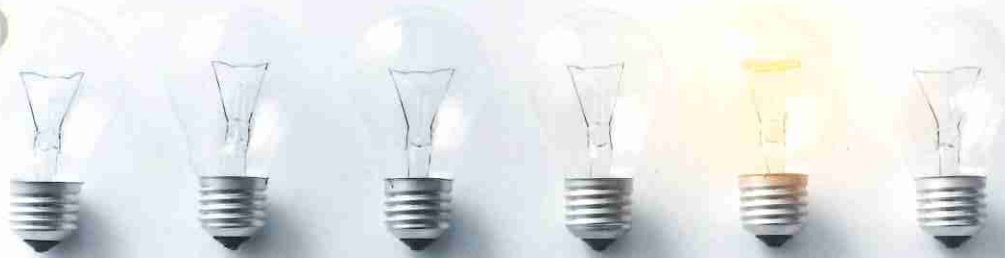
Oh WOW, look!... same price as before! 😄 Price: \$199.99



NEW YEAR, NEW YOU?

It's the dawn of a new decade. Step your law practice management game up by coming to my seminar, "Mastering Your Law Practice: The Roadmap to Profitability and Success". I will be laying it all out there with tried and true actions, steps and tricks to ensure you are wildly profitable and successful in your own practice. Go now to MasteringYourLawPractice.com to get a ticket for your seat today.

Also, send your disability referrals to me. Did you know we also take life insurance denials? Help your client, family or friends and make a little money for yourself. Referral fees are paid in appropriate cases. ☺



DIFFERENTIATE OR DIE! (FROM RAINMAKERS)



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■ WHY SHOULD I HIRE YOU?

Imagine if every potential client who walked through the door asked you that before signing the contract. What would you say? Would the things you said be legitimately true?

■ THERE ARE A NUMBER OF THINGS YOU COULD SPEW:

- Results. You can focus on a signature achievement, such as the highest personal injury verdict in the county, or tout numbers, such as a high volume of cases or a total dollar amount of damages or benefits recovered.
- Solutions. We consistently highlight the fact that our clients never have to come into the office. Thus, we perform all the heavy lifting, paperwork, communication and all our clients have to do is focus on the treatment of their disability from the comfort of their home.
- Experience. Do you have a specialization or board-certifications in a specific law practice?

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SAVE THE DATE

MASTERING YOUR LAW PRACTICE

The Roadmap to Profitability and Success

March 5th, 2020

Houston Marriott West Loop Hotel by the Galleria

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Perhaps you have a lot of experience working with a specific audience, such as dentists, government workers or women. You could also create a category of one, by making a statement like **"we are the only firm that..."**

However, the golden rule in marketing is **"Don't tell me how you're different... show me."** Nothing **"shows"** how you are different better than client testimonials and reviews. Lots of time and effort should be expended on obtaining as many positive reviews possible, then showcasing them all of across your digital footprint.

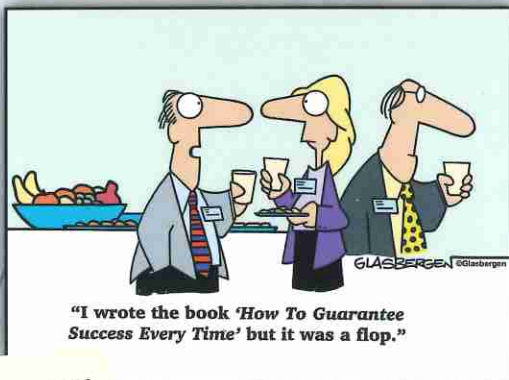
1 MICROMANAGE THE CLIENT EXPERIENCE

A boatload of good, quality client reviews don't happen by dumb luck. Your internal processes, procedures and the employees who run your firm all combine to create an experience your clients will want to rave about to the world. Which begs the question: How good are you at micromanaging the client experience?

4 KEYS TO MICROMANAGING THE CLIENT EXPERIENCE

1 Analyze every impact point.

No form of communication or step in the process should be overlooked, from the moment the receptionist answers the phone to when the client is successfully onboarded to when the case is settled and closed out.



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Develop a written set of procedures, train your people on them, and then periodically check in on them. Many software systems allow for templates to use for communication and tools to monitor phone calls and emails.

Secret shopping your team, or minimally just listening in and auditing phone calls and emails, should be a regular thing. Analyze all letters, even the minor ones to invoice for costs.

2 Develop standards, protocols, and systems.

It starts with: **"Here's how you answer the phone"**. Other examples include **"Here's how you answer frequently asked questions"** and **"Here's how you sign up a new client."**

Create flowcharts, diagrams, spreadsheets and checklists. No aspect of one's job should be ambiguous or up to them to decide how to perform a task.

All of these things are important to establish because life happens. People get sick, they have accidents and they have family emergencies. Employees resign and are fired. New and temporary employees start. The point is that you want a sense of continuity and quality control mechanisms in place so the client will never feel the pain of internal changes and transitions. Not only that, but you want to ensure your clients that you spent money to acquire are receiving a stellar and quality experience and you don't have to wonder if that is happening.



3 Train your people to work the system.

Train them exactly as you intend for your system to be carried out. Again, leave no room for ambiguity. Provide random reinforcement, publicly praise the team when they go above and beyond, and get rid of people who don't follow the system.

Without a system you **CANNOT** scale your law firm!

"Vision without action is daydream. Action without vision is nightmare."

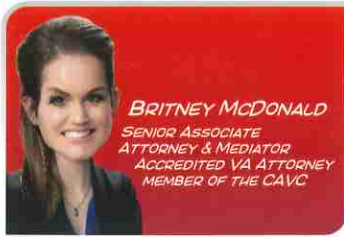
- Japanese proverb

4 Focusing on the client's experience of your law firm.

Plan and manage every step of the client experience; the look of the building, directions, parking, suite number.

You want to project upscale excellence and personal attention. This includes a nice reception area, sign on conference door reserving it for client by name, and a carefully thought out Wow package. *(Wow packages are an article for another day, but feel free to email me more about this topic).*

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BRITNEY McDONALD
SENIOR ASSOCIATE
ATTORNEY & MEDIATOR
ACCREDITED VA ATTORNEY
MEMBER OF THE CAVC

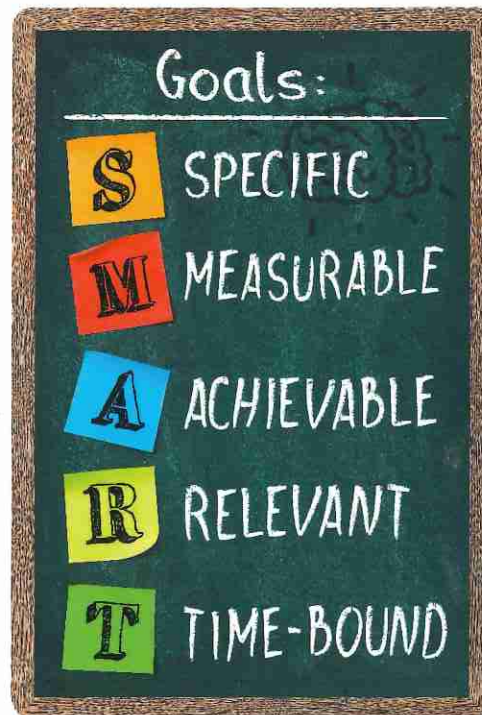
As with every January, and in what I now refer to as the “New 20’s” we inevitably begin to muse on what goals we need to set for ourselves, our careers, and our personal lives. It’s that time again—prophetically assigning activities to your routine in order to attain some idealistic version of yourself in the new year.

When most people start to set goals for the new year, they begin with answering questions like, “*what am I unhappy about?*”, “*what would I like to change?*”, and “*what could I do better?*”. These are solid beginnings to figuring how to better yourself with a resolution; however, as most people have experienced, its difficult to stay on track with your goals and actually fulfill your resolution, at least past say, the month of March.

In my many years of experience of only partially fulfilled goals, goals that I actually succeeded in meeting, and from my more recent discussions with my Atticus instructor, I have figured out a thing or two about how to meet a goal set for yourself. It all starts with how you set it up and endures with how you continually approach your goal as you confront it. The problem with “**goal setting**” is that life inevitably gets in the way of staying on course with your goals. For example, in your goal to lose X-number of pounds in 2020 or learning French, while those sound all packaged up for success, you know before March even hits you are going to find yourself losing

New Year, New Goals 2020

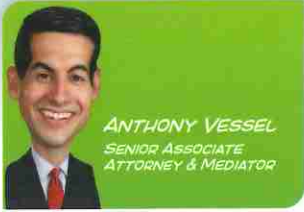
steam after losing the first pounds as you attend more decadent birthday dinners, or find that conjugating French verbs is a mind-melter and you just cannot maintain the level of intensity with which you had planned to study your new language. Simply setting a goal without recognizing the realities of your situation and how they will impact or impede your goal reaching is truly setting yourself up for failure.



It is just so important to plan for your life getting in the way of your objectives and therefore figuring out how to fit those objectives into your crazy life.

- Make sure your goals are “**SMART**” goals, in that they are “**Specific, Measurable, Attainable, Realistic, and Time-bound.**”
- Best practice to institute when you’re setting up long-term goals? Set mini goals that you are comfortable meeting. Set a plan to meet those mini-achievements that you continually aim towards—and don’t make a goal in the first place if it is entirely unrealistic. That type of goal is easily discarded and justified as an unattainable dream. Losing weight can be broken down into a plan where you aim to work out a certain number of times per month (*naturally weight loss follows in most cases*); Learning a new language can be broken down into a number of hours per week spent on Duolingo, or mastering certain words and their conjugations each month. Biting off smaller pieces of your goals is often a more attainable approach in goal keeping and reaching.
- Time-bound—important because if the completion point is undefined, you are more likely to never complete it!
- Finally, don’t set yourself up for too many goals—understand that even if you have 10 things you think you may be able to accomplish at once, more likely only three will survive your attempts.

Good Luck to you and your GOALS in 2020!! It’s a new year, a new decade, and a new AND realistic opportunity to improve yourself when you approach your goals in the right way! ☺



SPRING CLEANING YOUR OFFICE!

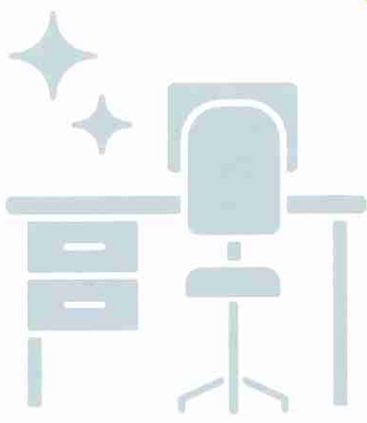


With Spring about to get sprung (*a la LL Cool J*), I've been looking around my workspace and feeling like it could use a good freshening up. In fact, I've got papers and files collecting dust that I haven't touched in years. Us lawyers can be masters at organizing our cases and arguments but, based on my visits to colleagues, that skill doesn't always translate into a tidy workplace. Therefore I researched the issue, and hopefully I can Marie Kondo your desk... although mine would end up empty because generally nothing on my desk at work doesn't bring me joy... only pain and suffering. Anyway, let's get started!

across the US. Do your part to aid in prevention and pack your briefcase before dashing out the door at the end of the day. Some essentials I keep are a spare charger for all necessary devices, legal pads, sticky notes, tabs, various pens (Blue Pilot G2 10's for the win!), highlighters, and of course a deck of extra business cards!

1 Keep only essentials at arm's length: ever walk into a colleague's office to find them hidden behind towers of documents? That's not good for anyone. Try to keep your immediate area clutter free.

2 Sort your drawers purposefully: at work and at home, I certainly have an "everything" drawer. It's okay to have ONE for your odds and ends, but once in a while you should sort it out. You'd be surprised how much useless junk ends up there, and how many useful things get lost in the chaos that is an "everything" drawer.



6 Have a basket or box for temporary items: how much junk mail, magazines, flyers, etc. do we get in a week? for me it feels like half of the Amazon Rainforest. I know this renowned publication technically falls under that category, but hey, at least we make you laugh with our horrible caricatures. Have a time each week or month to empty this box and to carefully place our magazine in a frame or safe.

3 Streamline your computer's desktop as well: Is half your computer's desktop covered in useless icons? Mine too. I use maybe 4 of them regularly. I need to follow my own advice here... delete, delete, delete!

7 Schedule a daily, weekly, or even monthly time to do a cleaning: disinfectant wipes, check. Air can the keyboard, check. Move mound of papers from spot A to spot B, check.

4 Use a hook/valet/armoire for your personal items: I'm the worst offender of getting back from court and throwing my brief case and jacket on my chair or desk. When I do choose to properly stow my things, my office feels much better and I don't have to frantically shuffle around to tidy my office for visitors.

5 Inventory your briefcase: ever get to court or home with your work and realize you don't have your favorite colored pen or your best highlighters? Yes, this crippling affliction affects 1 in 3 lawyers

"You can't wait for inspiration. You have to go after it with a club."
- Jack London

Hopefully these tips will help you have better organization in your office and legal practice. **Remember kids, an organized lawyer is a marginally less stressed lawyer!** 😊

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Dreams Small



"If your dreams don't scare you, they are not big enough."

I've heard this quote many times, along with a myriad of other quotes about having huge

dreams or making big, hard to attain goals.

While I whole-heartedly agree with the premise, I would highly encourage you to pause and reset your thinking a little bit. Big dreams don't happen overnight. In order to achieve a goal, you have to change your habits, behavior and mindset.

I don't know about you, but some of my bad habits are very strongly ingrained in my soul. That's why people give up on their goals, they become overwhelmed at the enormity of the goal they have set and try to do too much at once or become discouraged to the point of giving up.

In the last year, I achieved some pretty big goals. I ran my first half marathon, started graduate school and my husband and I bought our forever home. All three of these things happened because I dreamed small dreams and used those as steppingstones until I arrived at the final destination.

"If Your Dreams Don't Scare You, They Are Not Big Enough."

MAP OUT YOUR GOAL

For each of these goals, I identified three sub goals that needed to happen before I could achieve the big goal. In the house scenario, we needed to pay off debts, save a specific amount of money and sell our current home.

Within each of the sub goals, I created a task list and assigned due dates to each task. I wrote out credit card balances and planned out the payoff. I audited our grocery bill and Amazon orders and identified areas where we could make smarter spending decisions. We identified areas of our home that needed repairs or upgrades that were worth the investment so it would sell faster and for a higher list price.

I sold old furniture to clean up our home for showings (and so we wouldn't be moving old crap to the new forever house). Every single one of these things was planned out and given careful thought and – most importantly – a deadline. Each sub goal built on the sub goal achieved before it.



My original goal was to be in our forever home by January 1, 2020. We closed on it on July 23, 2019.

HABITS WILL MAKE OR BREAK YOU

Many goals seem just so unattainable because of bad habits you have that you can't break. In the half marathon example, I usually would go on runs at a park that had a large running loop. I would arrive at the park with grandiose intentions of running three laps (2 miles a lap, 6 miles total) then would give up after one lap. Or I would give up on myself and take walk breaks way too frequently rather than push harder and run larger stretches non-stop.

Bad habit number one was broken by finding a different park that has a 13-mile path along a bayou. After I ran 3 miles in one direction, guess what? I had to bring myself back 3 miles. *Though the thought of calling an Uber at the end of the first 3 miles did cross my mind a few times...*

Bad habit number two was a little harder to break, especially as I was forcing myself to get the correct amount of mileage in with each run. **So I dreamed even smaller.**

- ✕ On this specific run, I will make it to this mile marker non-stop.
- ✕ Next run, I'll make it to the next mile marker non-stop.
- ✕ See those trees in the distance? I can't stop running until I get there.
- ✕ Maybe I can take a walk break after the end of this song.

On race day, I ran 10 miles non-stop and then fell apart and was a complete mess for the final three miles. But hey, I did drag myself across the finish line. Goal achieved.

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2020 VISION:

Setting Yourself Up for the Raise/Promotion You've had Your Eye On.



New year, new you, right? As we look forward to this coming year I'm sure everyone is setting some lofty goals for themselves- but are you keeping track of your success?

If not, this year is the perfect time to begin, starting with your successes at work. Tracking tangible examples of the value you bring to your firm in the coming year will help set you up to ask for that raise/promotion/exciting new case you've been wanting. Taking in concrete examples of how the firm benefits from keeping you around shows your bosses you're not asking for something you haven't earned. Here's how to get started:

1. Create a spreadsheet. If you're like me and practice in different areas of the law, make sure each area has its own tab on the spreadsheet.

Example: my sheet has a tab for Social Security, mass torts, disability insurance benefits, and Veteran's affairs.



2. Within each tab, create a column to track the profitable or impressive things you do. Within my Social Security tab, I track the hearings I attend, the Appeals Council briefs I write, and the federal MSJs I write. Next to each event I track the outcome (*favorable/unfavorable, win/loss*). Next to that I track the amount of attorney's fees that have been generated from those events. At the bottom create an equation to sum everything up.

Voila! Now you know how much money you've helped generate in that specific area of law. Wash, rinse, repeat for the other areas.

Pro Tip you can even add a column for opposing counsel for each case. This can help you remember which cases you've had with them in the past and how you fared.

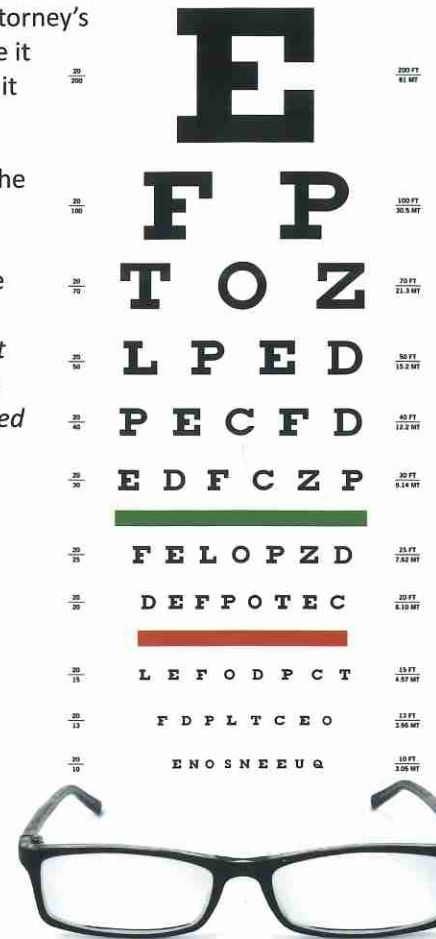
3. Become vigilant in updating this spreadsheet. Every time I come back from a hearing or write a brief I add the event to my spreadsheet. When I receive decisions from those events, I add that information in as well.

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Same goes for when attorney's fees are received. Make it part of your routine so it becomes a habit.

4. Finally, when the time comes, crunch the numbers and turn them into bite sized deliverables. *"In the year 2020 I brought in over 65 signed cases in X department. I helped earn the firm \$XXX by winning over 125 hearings. I prevailed in 15 trials by submitting 15 winning MSJs."* On and on. You get the picture.

Bottom line, talk is cheap. Anyone can walk into the corner office and ask for a raise or throw their hat into the ring for an upcoming promotion. These tangible and demonstrable examples of your worth is what's going to set you apart from the crowd. For non-Type-A people, this will be a test of your patience, but it would definitely be worth the effort if it helps you advance your career.



"Change is not a four letter word... but often your reaction to it is!"

- Jeffrey Gitomer

Speaking of, I have a few results for my own Case Tracker (trademark pending) so I'm off to update. Good luck, nerds! 😊

Continued
from page 5

Dreamy Small

NOW DO THE SAME FOR YOUR BUSINESS GOALS

Obviously, all these principles can be adapted to your work and business life. If your big, scary dream is to make \$25 million in revenue in 2020, what needs to happen to get there?

- ✦ More labor?
- ✦ More efficient software, processes, procedures?
- ✦ Do you have the right tools and infrastructure but you're not using it to the best of its ability?
- ✦ Do you have employees whose attitude is a drain on the performance of those around them?
- ✦ Where can you make spending adjustments?



Finally, share your dreams with your employees and identify activities they can do in their everyday work to achieve the dream. Give them tasks and deadlines. Make it fun and competitive.

Many employees complain and have a hard time with changes to processes and procedures because they can only see their singular piece of the puzzle. They don't know about the other pieces of the puzzle and don't know what the final picture looks like. 😊

Continued from page 2

DIFFERENTIATE OR DIE!

Schedule extensive, automated follow-up communication after the client signs with the firm. This could include a series of initial follow-up emails to answer all of the frequently asked questions or a mailed copy of a book about one week after sign-up. Over communicate with clients! Minimally, this includes a personal phone call by a paralegal every month to update him on the status of their case, even if there's nothing new. Failure to do this could lead to reports to the bar and or clients leaving you.

■ **Thinking out your processes and successfully implementing them will result in happier, raving clients and more money in your pocket. Cheers to a successful 2020 and new decade. 😊**



Lawyers Need a Laugh Conference

Achieving all your goals in 2020 starts with attending my seminar.

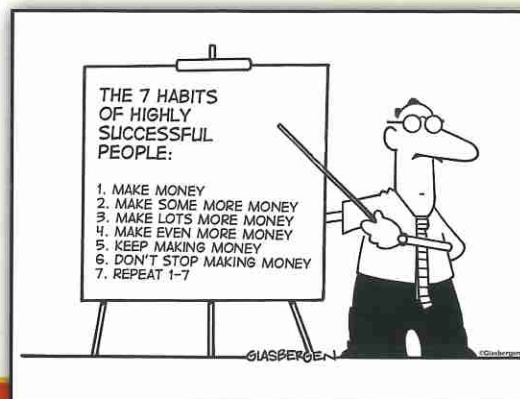
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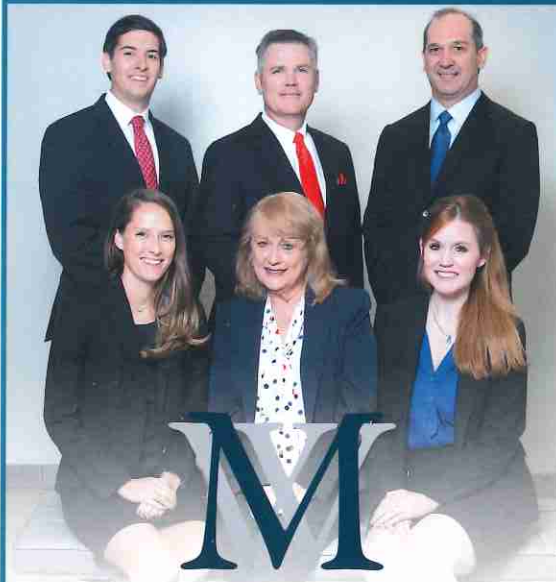
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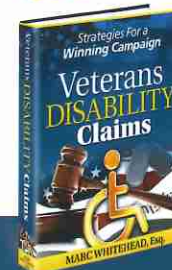
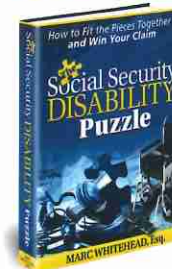
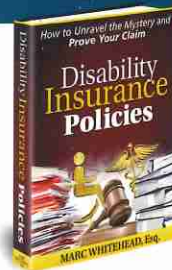
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