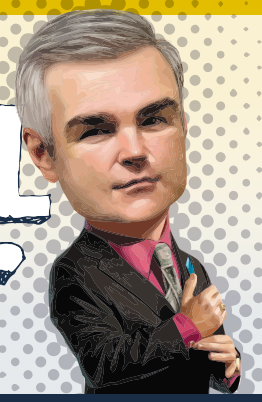




THE NEWSLETTER YOU'VE BEEN WAITING FOR... **\$uccessful Barrister**



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Summer is Here & Our Team is **FEELIN' HOT, HOT, HOT.**

No really, we're located in Houston, Texas. Since our AC units won't get a break until October- we've got vacation on the brain. In this issue we're busting out all the spreadsheets, the personality tests, and everyone's calendars. Keep reading and soon you'll be ready to put the lime in the coconut and shake some things up on your vacation and at your law firm!

And as usual, send long-term disability referrals to marc@marcwhitehead.com. Referral fees are paid in appropriate cases. ☺



MARC WHITEHEAD
BOARD CERTIFIED - PERSONAL INJURY TRIAL LAW
TEXAS BOARD OF LEGAL SPECIALIZATION
BOARD CERTIFIED - SOCIAL SECURITY DISABILITY LAW
NATIONAL BOARD OF SOCIAL SECURITY DISABILITY ADVOCACY

TRAVELING LIFE'S HIGHWAY!

THE SECRET TO CREATING THE ROAD MAP TO YOUR SUCCESS!

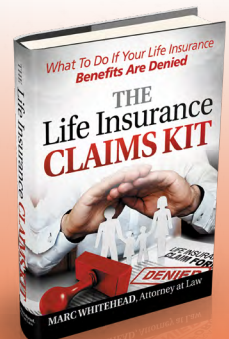
As Lewis Carrol wisely said, "If you don't know where you are going, any road will get you there." This timeless insight highlights the critical need for vacationers and lawyers to have a clear vision and direction, particularly in today's rapidly changing landscape. For law firms, establishing a solid growth strategy is essential to not only succeed but also to adapt to shifting market conditions and seize new opportunities. For Vacationers, it is essential if you want to have a fabulous, low-stress vacation. One powerful approach to securing long-term success and profitability whether on trips or at work, is the implementation of a (Growth) plan, i.e., **The Road Map.**

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FEATURE BOOK



Call Us For a Free Copy of Marc's Latest Book!

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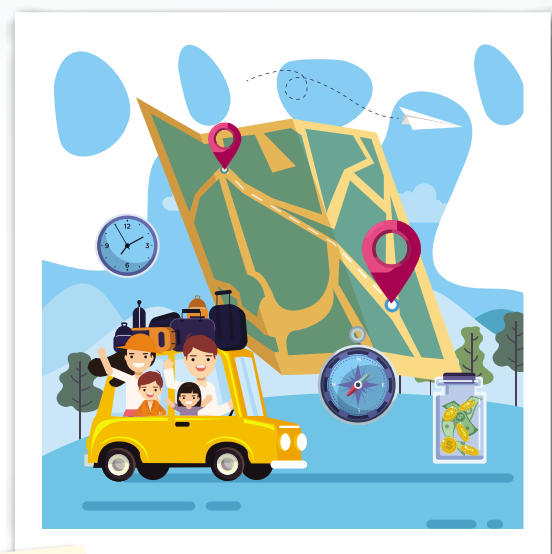
IF YOU ARE NOT GROWING, YOU ARE DYING.

When I refer to a growth plan in this article, I am not referring to long-term planning. A growth plan typically hones in on specific areas for expansion, such as entering new markets, launching new practice areas, launching new marketing strategies, or optimizing internal processes. It emphasizes short-term gains and measurable outcomes. Long-term planning takes a broader, more long-term perspective, considering various aspects like market trends, competitive analysis, resource allocation, talent development, and infrastructure requirements.

WHY YOU MUST DEFINE A CLEAR VISION AND STRATEGY

A growth plan enables law firms to heed Carroll's advice by defining a clear vision and strategy for their future. This plan serves as a roadmap, delineating the direction and guiding its actions toward achieving specific objectives. Setting goals and identifying the necessary steps to attain them ensures law firms progress with focus and intent. Furthermore, a growth plan assists law firms in making informed resource allocation decisions, directing investments toward projects that align with strategic goals.

"Vision statements without time-bound and measurable goals are like sails without wind - they may look impressive, but they won't take you anywhere." - **Jim Collins.**



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Below is our vision for the future of Marc Whitehead & Associates and our basic strategy:

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

MWA VISION

By the end of 2025, Marc Whitehead & Associates will have built a nationally recognized disability and injury law firm capable of helping over 3,000 new families each year. We steadfastly commit to our growth, the pursuit of excellence, and continuous improvement. We will consistently deliver compassionate customer service to our clients, be considerate teammates to each other, and create and maintain a fun place to work, all by living our Core Values.

STRATEGIES TO ACHIEVE OUR VISION

- Master the Law & Procedure of the Disability Law Niche
- Run the firm using Lean principles of measurement, waste reduction, and value production.
- Optimize the use of technology for maximum returns and efficiency.
- Continuous System Refinement
- Recognize & Reward Performance
- Market Regionally and Nationally
- Develop and maintain a firm culture that lives its Core Values

NOTE: Our vision follows the formula of **What, by When, and How.**

WHAT WE WANT- To build our firm's marketing and intake capabilities to the point where we can sign 3000 new cases per year and have the capacity to handle that large of a caseload. **WHEN-** Is the end of 2025, i.e., in 3 years. **HOW-** Is by developing systems, processes, and procedures, i.e., the pursuit of excellence and continuous improvement. Our strategy further defines how we are going to get there.

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Make the Most of the Moments



BRITNEY McDONALD
PARTNER / MEDIATOR
ACCREDITED VA ATTORNEY
MEMBER OF THE CAVC

It's right what they say, the days are long, but the years are short. Time flies, even when we **aren't** having fun. Science actually backs this up!

Time seems to get faster as we age, it is a part of the human experience. Our perception of time is inherently linked to how much time we have already lived – we mostly only remember the “new stuff” as we get older, and because we have “lived” through so many things, the new stuff gets harder to come by as we age.



Think about it, when you are little, every minute is a new **Kodak moment**; even within the mundane trips to the store, going to school, and seeing your friends, you live every second of those moments. To quote my 3, almost 4-year-old, “it takes a long time!” anytime we get in the car to do something she’s looking forward to, even if we are headed only minutes away!

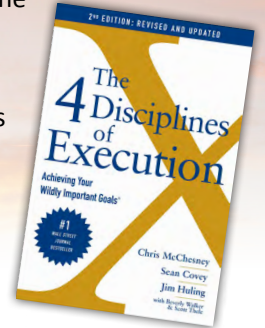
“A camera is a SAVE button for the mind’s eye.”

– Roger Kingston

In our 30’s, 40’s, 50’s +, our brains don’t register each of those moments and transform them into long-term memories as easily. It’s perplexing how the month of March is seemingly endless to a 6-year-old, but NYE is quickly followed by May as an adult. I read a 2018 NBC piece claiming, “We can’t slow time down, but we can do things to pace ourselves and create more lasting impressions of times past,” where scientists agree that in order to retain better memories, we need to be spontaneous, meet new people and have new experiences

in new places. We need to make the most of the opportunities we have, the moments we are given.

Having been encouraged to study the 4DX method (*Four Disciplines of Execution*), I am intimately familiar with how the everyday “gray” tasks can be overwhelming when it comes to executing new processes in a business. I felt as though weeks went by without traction on my goals because I was too focused in getting through the day-to-day busy-ness. As with life, without stopping to metaphorically “smell the roses” and take in those small moments committing them to memory, collectively, those moments are lost and you turn around at 75 wondering where the years went.



Commit yourself to not only smell those flowers but to paint them too. Dance around them, write a song about them. Appreciate the big AND small things, your life will be better lived as you create lasting memories of moments that made you laugh and smile. When you are 75, your years will be filled with more happiness than could be held within yourself, able to transform any moment into a blissful musing of times past.

I had a good friend tell me once that friendships and marriages are not built on margaritas at the beach. I’ve come to know this could not be truer. Those are the big moments, the honeymoons and vacations, and yes, they leave lasting impressions of those times in our lives. Truly though, the relationships themselves are built on the everyday, seemingly ordinary occurrences that we typically overlook, each repetitive occurrence building on the next while shaping our overall relationship with that person. No amount of jet skiing or snowboarding is really going to save a relationship, it’ll be how we interact and make the most of those small intimate moments between each other that carry us happily through our years. I’m set on making the most of these times.

Let’s live in these moments, be present and fully experience these days through each of the years ahead of us. 😊

LIVE LIKE A LOCAL!



ANTHONY VESSEL
PARTNER / MEDIATOR

When I travel, especially to other countries, I do my best to leave my entitled attitude at home, and embrace the local culture. I love

to try foods I've never tasted before, observe customs and culture unusual to me, and go off the beaten path of tourist traps. I was recently able to do this from a professional standpoint. I was graciously invited to do a site visit with another firm I've connected with through our national trial lawyer organization, American Association for Justice, (AAJ.)

I had the privilege of visiting another firm across the country. We learned a great deal from sitting down with them and talking through some systemic issues we have observed within our firm. We also happen to use the same case management and client contact software, so we were able to brainstorm about best practices with those as well. Our hosts even gave a tour of their

office, which was interesting to see how they set up their teams from a physical standpoint. Although our whirlwind trip was scheduled to be 24 hours (*which ended up being more like 30 hours thanks to multiple flight delays*), we gained a wealth of knowledge and solidified some great contacts.

I know, as attorneys, we can be a prideful and hard-headed lot. I urge you, lose that predisposition and open your mind to the ideas of others. The ego is the enemy. Drop that which holds you back and learn to humbly pick the brains of others. I believe Confucius said "*those who ask questions are fools for a moment, and those who don't remain fools for a lifetime.*" My dad once said, "*Anthony, you can always learn something from everyone you meet*" and "*No matter how good you are, there's always someone who's better or knows more.*"

"A journey of a thousand miles begins with a single step."

– Lao Tzu

So to our hosts, (*whom I'd name but I didn't ask permission and I'm pushing into my Friday 5pm deadline*), I'm eternally grateful for your hospitality and open sharing of ideas. To our readers, you don't necessarily have to travel across the country to have the same effect; you can pick up the phone or grab coffee at a conference. Just open your mind to how other (*firm*) cultures do things, and you can learn a lot.

Ciao for now! 😊



A Day at the Beach: Managing Different Personality Types



DIANA SINGSON
CHIEF OPERATING OFFICER

Sandy beaches. The sound of the ocean waves. Blue water as far as the eyes can see. Some probably just visualized lying on a lounge chair with an umbrella drink, while others visualized jet

skis, parasailing, and surfing... all in one afternoon. Inevitably, these two people will find each other and marry each other.

For as many umbrella drink-beach activity people that find each other, there are as many teams struggling with the tension created by different personality styles.

However, to slightly adapt the old adage: conflict is inevitable; discord is not.

It's Not You. It's Me... Or Is It You?

Our Firm uses the DISC test during the hiring process and continue to use it post-hire to foster better communication and teamwork.

Excerpts from our high-I tests can say that the candidate *"tends to tell people what he thinks they want to hear,"* whereas high C's (which I test as) see *"facts as facts."* High I's can then be perceived as *"glib"* and high C's as *"inflexible."* When we approach conflict with an awareness of the other's personality style, it can be much easier to see that actions are not personal. Just as I do not mean *"insensitive"* (common high "C" trait in the extreme), our team members do not seek to hurt us when they over-promise on their due dates or when they arrive late to a meeting (both common traits for high I's).

One of our high-I attorneys has stopped by my office at the end of a busy day, taken one look at me, and said, *"You have no 'I' left. I'll come back another time."* He does not take it personally that I do not have the energy for him. Similarly, my go-to meeting style is to start the meeting with a clear, *"The purpose of this meeting is to"* In meetings with him, I create time at the beginning for a quick social catchup. He understands that is not my natural style and appreciates all the more that I made the time for the social connection. Now, even when he is not in the room, I begin with small chitchat in case there is a high "I" in the room. Understanding his and other personality styles has made me a better leader.

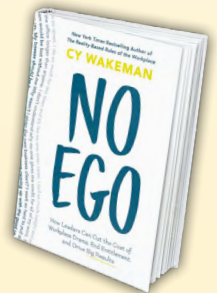
When we approach our teams with the desire to understand (*and a whole lotta grace*), we truly live up to one of our Firm's Core Value of Teamwork.

DON'T take it personally. DO hold team members accountable.

In addition to Teamwork, another one of our Firm's Core Values is Accountability. Understanding that high I's may overpromise does not mean we do not hold those team members accountable for deadlines.

Marc and I lead our attorneys in a quarterly Leadership Boot Camp where we workshop a book we have all read that quarter. One of the first books was **No Ego** by Cy Wakeman where she suggests, *"Engagement without accountability creates entitlement."*

Wakeman discusses the *"happy marriage of accountability and engagement"* and how *"change"* and *"conflict"* are *"part of the price of workplace participation."*



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TIME & TRAVEL



SELINA VALDEZ
MANAGING ATTORNEY
VETERANS DISABILITY

If you could spend a fixed period of time doing something, what would it be? Maybe 15min for a cup of coffee. 30min for that expense report you

haven't started. One day for all those errands you need to run. I would travel somewhere. I am counting down the days for my next full week off so I can sit on a beach and put my email notifications on "do not disturb."

I love to travel, and that passion has led me to some unique parts of this world. I've traveled to Australia, Singapore, Indonesia, Japan, China, Europe, and several other amazing places. Prior to being a lawyer, I worked in the oil & gas sector and my work took me on some incredible adventures. If you get a chance, ask me about my first return trip from Indonesia.

While my passport is currently collecting some dust (*thanks Marc*), I still get to live vicariously through my better half's travel adventures. Let's just say his work travels put my passport to shame as he's seen more places than I can count. We still travel together a few times a year, usually to cash in on those United points.

Going on vacation these days comes with its fair share of prep work though. I used to feel like I had to run faster on the hamster wheel before going on vacation only to have my post-vacation bliss ruined when I realized how much work was waiting on my return. It was a vicious cycle until I adapted another Marc-ism: time blocking.

I used to be horrible at time blocking. Marc would make me time block my entire week, print it out, and hang it on my door. Not sure why I had to hang it up, but it was a practice that eventually paid off because now I am a pro. While not every minute of my week is blocked, I start with the most important items: hearings and appearances. Then I work backwards from there. I block travel time to courthouses, so no one schedules me for a phone call while I'm supposed to be driving (*you know who you are*).

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I block prep time for hearings and phone calls, meetings, and lunch. Yes – lunch. I can crank out a full workday with no problem, but I need at least one break in there. Even if it is just 30 min for a quick walk and some stretches, the team knows not to mess with my lunch break. My afternoon is much more productive and I'm in a better mood when I get to power down for a few minutes. The point is to time block what is important in your day and what you need to prioritize.

Time blocking has caught on as a practice in our firm and everyone is learning to respect the time blocks. ***"What about that really important question someone has that merits an interruption?"*** We call that the ***"whirlwind."*** There is also going to be another gust in the whirlwind of our jobs, so we have a time block for ***"office hours."*** Yup – just like in college... the attorneys have office hours. Everyone has a minimum of 2 days per week for 30 minutes. Mine are Tuesday & Thursday from 4:30pm-5pm. The door is open and anyone can come to my office to talk about WHATEVER they want. I've helped team members with college applications, swapped meatball recipes, and answered many questions they didn't have the courage to ask before because they felt I was ***"too busy"*** or they were ***"interrupting."*** Once the team understood this time block was intended for them, they took advantage of it.

Prioritize what is important to you. This Marc-ism taught me the team and their questions should be important to me because I don't know what they don't know. I don't know how I can help them or what issues plague them. I don't know what questions lurk in the back of their mind.

Turns out, all I had to do was time block a space for them and open the door. ☺



TRAVELING LIFE'S HIGHWAY!

Continued from page 2

WHY 3 YEARS IS THE SWEET SPOT - JUST MY OPINION!

While long-term vision is essential for law firms, it is also crucial to recognize the limitations of planning too far into the future. A 5 or 10-year growth plan, although ambitious, can often be too lengthy, making it challenging for law firms to adapt and respond to the ever-changing legal landscape. Therefore, it is crucial to stay flexible and adaptable. Limiting yourself to a 3-year growth horizon maintains that flexibility.

How can a Good Growth Map Help? A well-crafted growth map, that is published to your team and adopted into your firm culture can help in a number of ways including:

- Enhancing Communication and Collaboration
- Establishing a System for Measuring Success
- Adapting Proactively to Market Changes
- Attracting Investment and Securing Financing
- Incorporating Intermediate Goals and Targets

BREAKING DOWN YOUR GROWTH MAP INTO BITE-SIZED CHUNKS:

"Complexity is the enemy of execution. Success is not found in the grandeur of the plan, but in the discipline of breaking it down. By slicing your ambitious goals into small, digestible pieces, you not only make progress tangible, but you also turn the daunting into the achievable."

While a growth plan offers a strategic overview, breaking it down into smaller, more manageable goals and targets is essential. Establishing intermediate milestones, such as 90-day objectives and annual checkpoints, helps law firms maintain focus, ensure progress, and facilitate regular evaluation. It also helps law firms stay agile, adapt to changing circumstances, and maintain their competitive edge.

In summary, while it is essential for law firms and their lawyers to have a long-term vision, a shorter-term growth plan offers a more realistic and adaptable approach, making it easier for law firms to navigate the ever-changing legal landscape. By incorporating 90-day milestones and annual checkpoints, law firms can strike the right balance between

long-term vision and short-term flexibility, setting the stage for sustained success and profitability. **So, whether you're strategizing for your legal practice or doing your best to keep your gremlins happy- remember to set clear objectives and milestones, keep a drink in your hand and don't forget your sunblock ☺**



A Day at the Beach: Managing Different Personality Types

Continued from page 5

She further posits this is "good news" because it allows team members to be engaged and to feel a sense of accomplishment.

If Wakeman's theory is to be believed, the goal then is to not avoid conflict but to create an environment where healthy conflict is the by-product of an engaged team. A key step, according to Wakeman, is creating a culture of accountability, which is comprised of four factors, including ownership.

Wakeman describes ownership as the "bedrock of accountability." She continues, "Defensiveness is a good sign that people are operating from ego instead of ownership. People who take ownership don't spin stories or generate drama," both of which, in my own words, translate to discord.

Day at the Beach

I am not suggesting that our team is without discord. There are ebbs and flows to every relationship, including those with and amongst our team members. Even with a healthy emphasis on our Core Values, scenarios arise and feelings get hurt. **But by not taking things personally and by using our Core Values as our compass, managing different personality types can be a day at the beach... however you visualize it. ☺**

*Knock-knock. Who's there?
Europe. Europe who?
No, I'm not! You are!*

Lawyers Need a Laugh

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There's no better vacation than my boss being on vacation.



someecards

MARC



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DISABILITY & INSURANCE DENIALS



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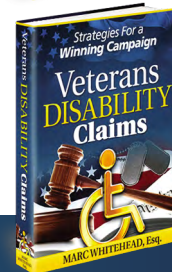
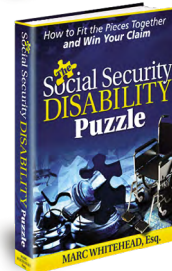
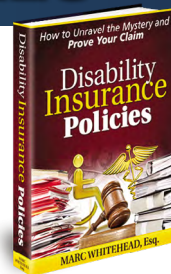
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