

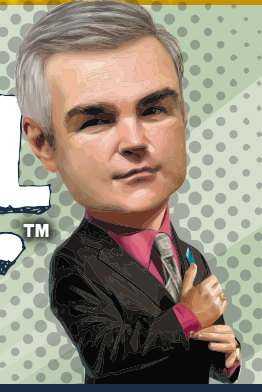
Jan/Feb 2024

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

Vol. 10

Issue: 01

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



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## Research Shows...

that only 9% of Americans that make New Years resolutions are successful in implementing them into their lifestyle. Along with that, 23% quit in the first week and 43% quit by the end of January. This year, we're joining the 9% Club!



In this issue we're throwing it back and looking at some of the best advice Marc has ever graced these pages with. From expanding your productivity to honing the craft of time management, these articles will have you jumping into 2024 with the skills needed to tackle your resolutions. ☺

**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



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## Business Made Simple: a Gift that Keeps on Giving

Christmas is here and with that comes gift-giving season. Because I am feeling especially jolly this year, I gave the best gift I know how to give to each of my associate attorneys: a copy of **Business Made Simple: 60 Days to Master Leadership, Sales, Marketing, Execution Management, Personal Productivity and More** by Donald Miller.

Miller presents the idea that in order to get ahead in business, you have to show you're adding value to your organization and you can do that by mastering 10 competencies. Let's discuss.

### KNOW HOW A BUSINESS REALLY WORKS

The key idea here is understanding activity to output ratios and the need for positive cash flow. One has to build a solid foundation in each aspect of business in order to produce the value requisite for achieving lasting success.

This includes establishing routines to get feedback and becoming skilled in de-escalation. One needs to consistently make good decisions, take the right actions every day and have a growth mindset.

CONTINUES ON PAGE 2

### NEWS FLASH!



PAGE 1 OF 8

## BE A CLEAR AND COMPELLING LEADER

You cannot expect to achieve your goals if everyone working under you:

1. Are not aware of your goals
2. Don't understand your expectations because they are not clearly and regularly communicated



As much as you would like to think they can, people can't read your mind and leaving actions open to interpretation is a recipe for disaster. Being a clear and compelling leader consists of:

- Creating a mission statement in which you believe
- Specifying the characteristics you desire in your employees
- Define three critical daily actions (*starting to see a pattern here in communication?*)
- Craft an engaging story

## BE PERSONALLY PRODUCTIVE

Monkey see, monkey do. Be the example you want everyone to follow. Put in the work in an efficient manner to drive the firm in the direction you want it to go.

My marketing director goes into more detail in her article this issue called the Gift of Time. I suggest you take a peek to see how her principles of time blocking, power hours and good habits will apply here.

## BUILD GREAT MARKETING CAMPAIGNS

You went to law school to learn the law. They probably

did not teach you in law school how to run or market a business. Might I suggest here engaging with people who are skilled, intelligent marketers who are adept at taking your goals and vision to create a roadmap to success.

If you're just starting out, mom and pop advertising agencies, a trusted marketing consultant or a newly graduated marketing coordinator would be a good starting point. As your firm grows in caseload and cash flow, you might want to consider upgrading your marketing investment in either more sophisticated agencies or a more experienced in-house person.

## BE A GREAT COMMUNICATOR

To be a great communicator, answer the five questions in everyone's mind:

1. What's the problem?
2. What is your solution?
3. What will life look like?
4. What do I need to do?
5. What should I remember?

## KNOW HOW TO SELL

It's not about you, it's about them. The client is always the hero of your story.

Effectively selling means telling a clear and compelling story so your client easily understands exactly how you are going to give them the tools needed to win their case.

Donald Miller also wrote a book called *Building a Storybrand* that goes into this principle in massive detail. I highly recommend you read it.

## BE HIGHLY SKILLED AT NEGOTIATION

We are all attorneys here. This should be a slam dunk. *Moving along...*

## BE A GOOD PEOPLE MANAGER

According to Miller, *"Management is about helping other people win so the overall team can win. Managers who are not liked*

Donald Miller

Author of the #1 Wall Street Journal bestseller *Building a StoryBrand*

# Business Made Simple.

60 Days to Master Leadership, Sales, Marketing, Execution, Management, Personal Productivity and More

*are managers who do not have a clear definition of what it means to win or don't have a clear idea of the wins each individual team member can experience personally while they are helping the overall team win."*

This all ties in with the overall current theme of clearly communicating goals, expectations and providing the tools necessary to win.

*And last but not least...*

## KNOW HOW TO GET THINGS DONE

We can talk all day long (and probably do), strategize, pay for the best marketing consultants and create the best game plan possible. All of it is for naught if you don't actually do it.

*Merry Christmas, Happy New Year, and I look forward to bringing you more lessons that probably won't get you disbarred in 2022-24. ☺*

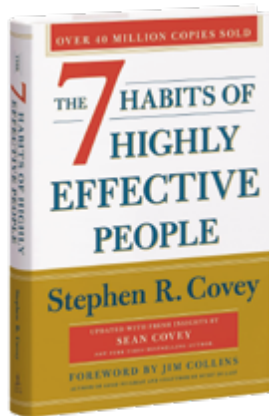
*"Business opportunities are like buses, there's always another one coming"*

*– Richard Branson*

# Seven Habits of Highly Successful Lawyers

Twelve years ago I read “Seven Habits of Highly Effective People” by Stephen Covey. I was so impressed that I attended one of his courses and then summarized the book.

To this day, I keep that summary on my clipboard and review it weekly. Here is a quick summary of how I think Stephen Covey’s “Seven Habits” can apply to lawyers.



## Habit 1- Be Proactive

The primary determining factor of our personal effectiveness is understanding that we are in control of our own decisions. With this power comes the responsibility of the consequences of the choices we make. Don’t wait for life to happen to you, make your own luck. Make a point to look for opportunities everywhere. As the saying goes, “*you do not have to be great to get started but you do have to get started to be great.*”



## Habit 2- Begin with the End in Mind

Whether you are thinking about a case, your career, or your personal life, visualize the end game. Leadership is determining what you want to accomplish. Management is determining the best way to accomplish what you want.

I suggest by starting with your three to five year plan. Don’t be afraid to think big. Be specific and write it down. Then develop your one year plan with your three to five year plan in mind. Next, develop your 90 day plan with the intermediate goals of your one year plan in mind. Then set your weekly and daily plans accordingly, always writing it down and keeping the big picture in mind. My best tip is to have an accountability buddy that you share your shorter term plans with to keep you on track.

## Habit 3- Put First Things First

Successful lawyers keep their focus. They get and stay organized. To put first things first, you need to define your most important functions. If you are the leader of your law firm or practice area, your most important functions are usually being the manager, the marketer and your client’s chief legal strategist. Remember, these functions are the “*highest and best use of your time.*” If possible, delegate everything else.

## Habit 4- Think Win/Win

Successful lawyers have an abundance mindset. Allow yourself to believe there are enough resources and successes to share with others. This includes your clients, staff, vendors and even your opposition. When you think big picture, you by necessity are thinking long term. When someone

loses, it could come back to bite you. Pick your battles carefully and help yourself by helping others.

## Habit 5- Seek First to Understand... Then to Be Understood

When you are meeting with a client, staff or opposing counsel are you genuinely listening empathetically? Are you willing to be influenced by that other person or are you just waiting your turn to say what you want to say? Consider your audience and what they need from you.

## Habit 6- Synergize

Successful lawyers learn how to utilize all resources available to them and make them work towards a successful result. They lean on others. Get a team and get it working for you. Figure out what you do well and find team members to help you with the rest. This could be your staff, vendors or outsourcing.

## Habit 7- Sharpen the Saw

Abraham Lincoln once said “*Give me six hours to chop down a tree and I will spend the first four sharpening the [saw].*” To be a successful lawyer, you must first take care of yourself and your family. Your physical and emotional wellbeing are a must if you want to be focused, organized, and proactive in your law practice. Remember to schedule time for exercise in your calendar. Make sure to put your family first. See Britney McDonald’s article, **Sharpening Your Saw**, for a more in-depth description of this habit.

Also, remember to continue to educate yourself and expand your horizons. I make a point to not only go to CLE’s to keep my legal mind sharp, I also make a point to learn more about law firm management and marketing. Groups such as PILMMA, Great Legal Marketing, ATTICUS and The Rainmaker Institute have great programs to help you manage and market your practice.

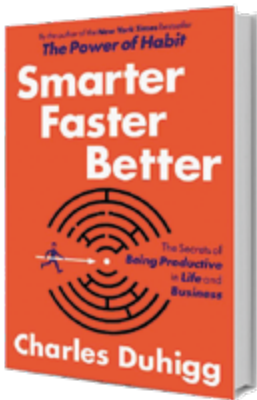
***In future issues, I will expand in more detail some on some of the key habits. Be well! ☺***

# SMARTER FASTER BETTER

## 8 Key Ideas for Expanding Productivity



Everyone wants to be Smarter, Faster, and Better at everything they do. But how do you actually do that? Well, according to Charles Duhigg, author of the book *“Smarter Faster, Better; The Secrets of Being Productive in Life and Business”*, the first thing to realize is that you need to start assessing **HOW** you think about things rather than just **WHAT** you think about. Sounds a bit Zen doesn't it?



Think about it this way, your choices will always keep you productive. The tools, technology or time spent being productive are just that; tools. Sweating night and day chained to your desk isn't going to make you more productive. Making bigger and bigger sacrifices will not make you more productive. What makes you more productive is discerning how to make **the best choices in the best ways**.

As Charles puts it, “How you see yourself and frame daily decisions; the stories we tell ourselves and the easy goals we ignore; the sense of community we build among teammates; the creative cultures we establish as leaders: These are the things that separate what decisions you make daily, how you see your team, how you attack or ignore simple goals, how you lead; these are the things that separate the merely busy from the genuinely productive.”

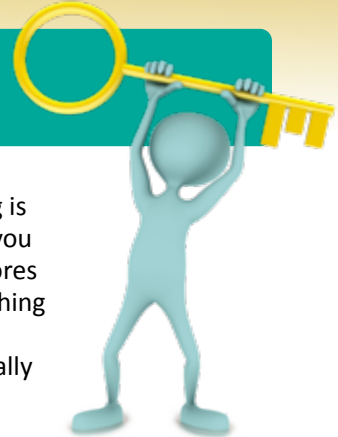
**The book keys in on eight ideas that when connected, help to underline the principle ideal:**



Here is a **BREAKDOWN** of the **8 KEYS**:

### 1. **MOTIVATION: GIVE YOURSELF A SENSE OF CONTROL AND TURN CHORES INTO CHOICES**

Charles explains that the best way to increase your motivation for anything is to always make the choice that puts you in control. This will help you turn chores into choices. When you attach something you care about to your tasks, you will always find it easier to start and actually complete the task.



### 2. **TEAMS: MANAGE THE HOW OF THE TEAM, NOT THE WHO**

To help create more productive teams you must create a safe space where team members can speak their minds. Equality is essential. Encourage your teams to speak up and to encourage each other. A team really doesn't take much to tear down. A bully here, a gossip there, or even too little encouragement will defeat any structure. Be sure to stay aware of the underlying dynamics of your teams. The power lies in how your team operates, not who is on the team.

### 3. **FOCUS: CREATE MENTAL MODELS THAT PUT YOU IN CHARGE**

An interesting way to help enhance your focus is to build a mental model of what you expect to see within any given situation or goal. If you can tell yourself a story regarding your goal and then imagine what will happen, you will sharpen your focus. This will allow you to handle the important items first instead of being overwhelmed with ALL of the information surrounding the situation or goal you are experiencing.

*“You don't build a business, you build people, then people build the business.”*

– Zig Ziglar

#### 4. **GOAL SETTING: COMBINE SMART GOALS AND STRETCH GOALS**

SMART (Specific, Measurable, Achievable, Realistic, and Timeline) goals are great for short term thinking. If you have a huge goal in mind (Stretch Goal); break up this large, seemingly unattainable goal, into smaller SMART goals. You will find it much easier to reach the end goal. Like the old saying goes, "How do you eat an elephant? One bite at a time."

#### 5. **MANAGING OTHERS: PUSH DECISION MAKING TO THE CLOSEST PERSON**

Employees and Teams always work better if they believe that their work and opinions are valued. Give them decision making authority and watch how committed they become to the goals of the team. Find the person closest to the problem... at hand and push the decision making to them. When colleagues are committed to success together the end result is much more dynamic.

#### 6. **DECISION MAKING: ENVISION MULTIPLE OUTCOMES & EXPECT THE MOST LIKELY**

One of the keys to better decision making is to learn to think about probabilities. Contemplate the various outcomes of a problem and then figure out which one is the most likely to happen. This skill becomes easier once you begin to hone your intuition through successes and failures.

#### 7. **INNOVATION: COMBINE OLD IDEAS IN NEW AND BETTER WAYS**

When you think creatively, you tend to combine new and old ideas into a new setting. Always think of yourself as an "idea broker". Pay attention to your feelings, your gut, and even creative desperation. We all know that some of our best work has been born of a late night or a short deadline. Use these experiences to your advantage when looking for alternatives.

#### 8. **ABSORBING DATA: FORCE YOURSELF TO INTERACT WITH NEW DATA**

One of the best ways to absorb anything new is to think of a way to use what you have learned. Do something with it. Write it down. Try it out as soon as possible. Run an experiment. Explain it to a colleague. By interacting with new data, you turn that information into knowledge.

**If you have time, you should give Charles Duhigg's "Smarter Faster, Better; The Secrets of Being Productive in Life and Business" a read, it will help change the way you tackle your goals and help keep you focused and brilliant! 😊**

# Time Management for Attorneys



## Take Control of Your Time.

*The key is not to prioritize what's on your schedule, but to schedule your priorities.*

Time management is an oxymoron - you can't manage time, you can only manage yourself. On any given day, clients and other attorneys call, colleagues and staff drop by your office, and email notifications constantly pop up on your computer screen or smartphone — causing more disruption to an already busy schedule. But there are ways to tackle the daily barrage — the first is to realize that multitasking is a myth. In order to reach the level of focus and productivity you want, you need to follow these five basic time management skills:

- **PRIORITIZATION**
- **GOAL SETTING**
- **SCHEDULING**
- **MANAGING INTERRUPTIONS**
- **DELEGATION**

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# 1 PRIORITIZATION

To become more effective, whether that be in your career or your personal life, you need to become more selective in what you choose to spend your time on. First, examine what roles you play in your career as a lawyer. Once you understand your roles, you can set your goals that will then assist you in making your plan. In a law practice there are three essential priorities of an effective attorney.

- MANAGING LAW PRACTICE AS A BUSINESS
- MARKETING & BUSINESS DEVELOPMENT
- CHIEF STRATEGIST & PROBLEM SOLVER FOR YOUR CLIENTS



# 2 GOAL SETTING

Just like any other business, your law practice needs vision and an entrepreneurial spirit—but you can only achieve that vision by setting and reaching specific goals. Break down long-term goals into quarterly plans. To do this, write down your long-term goals. Then boil those down to one-year plans, and then again into quarterly plans. These plans will inform your day-to-day priorities, while you keep the big picture in mind.

# 3 SCHEDULING

Once you have prioritized your tasks and broken them down into component parts, schedule them on your calendar.

## THE 'BLOCK AND TACKLE' APPROACH

Block out a specific time on your calendar to tackle one task, uninterrupted by any distraction—no phone calls, no emails, and no visitors. I like to call this the “block and tackle” method. Let your colleagues and staff know that your time is reserved during these blocks. These “power hours” are your time to be brilliant.

## ORGANIZE YOUR CALENDAR

Set up your calendar to function more efficiently and help you visualize the tasks you need to complete. Use a color-coded system for different categories of work, such as marketing and business development or case strategy. I find that Outlook works great for this. With a quick glance, you’ll be able to determine your tasks for that day, and over time you’ll also see how you spend your days and whether you need to make any adjustments.

# 4 MANAGING INTERRUPTIONS

Your day is probably full of unscheduled calls and visitors that require your attention. Studies show that it can take five to 15 minutes to refocus on what you were doing before a distraction broke your concentration.

## SCHEDULE YOUR INTERRUPTIONS

An easy way to make these intrusions more manageable is to actually schedule your interruptions. Schedule time blocks on your calendar specifically for answering employee questions, responding to email, and returning client calls. Schedule telephone appointments just like you would any other in-office appointment. I have open office hours at regular times each day for staff to pop into my office unannounced. If you do this, you’ll be expecting interruptions during those times and won’t settle into tasks that require a high level of concentration — save those for your “power hours.”

*“Success is how high you bounce when you hit bottom.”*  
 – Gen. George S. Patton

## CONTROL YOUR EMAIL

This can seem impossible since you probably receive an onslaught of emails every hour. But just like keeping your calendar organized, it’s important to make your email more manageable. Sort your inbox automatically by setting up Outlook rules, which will route incoming messages to the appropriate folder. Create separate folders for courts, attorneys, departments, organizations, list servers, clients, finances, and personal email. Use whatever arrangement suits your needs to help you deal with your inbox in a timely manner.

## 5 DELEGATION

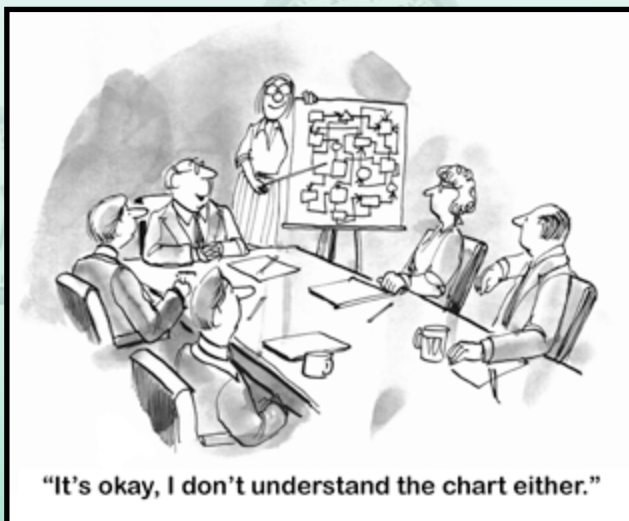
Successful lawyers stay focused and organized. But you can't do everything yourself—you need to learn to lean on others and let go of certain tasks. Use all of the resources available to you: Figure out what you do well, and find team members to help you with the rest. The first step is to define your most important functions. Ask yourself the following questions:

- What can only I do?
- What can I delegate?
- What can I eliminate?
- How can I do this more efficiently?
- Is this the best use of my time?

For example, you can delegate or outsource certain functions such as bookkeeping, record collection, and call backs. Train one or more associate attorneys, paralegals, or secretaries to take care of clients if you're not available. This person should have ready access to you, and be customer service-oriented and detail-oriented. Introduce him or her to your clients early in the process so they'll know what to expect.

As you work through this process remember, "Don't mistake movement for achievement. It's easy to get faked out by being busy, the question is: Busy doing what?" **Your to-don't** list should be longer than your **to-do** list- just because a task exists, it doesn't mean that you should take it on.

**Think about your goals and priorities, and implement good systems now to make the best use of your time and talents in the long run.** ☺



Craving more from the **\$uccessful Barrister?**

We're starting a  
**PODCAST**  
COMING Q1 2024!

**ON AIR**



Look for more details in our next issue!

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# Lawyers Need a Laugh

To help you get started on your 2024 journey, we've included 12 realistic New Year's resolutions.

1. Get Organized
2. Take a client-centered approach to practicing law
3. Start accepting online payments
4. Network More
5. Bring more of your legal practice on the go
6. Revamp your online reputation
7. Have better meetings
8. Become more data-driven
9. Prepare for client intakes before you meet with the client
10. Take better care of yourself
11. Attend events to invest in your firm's future
12. Try a new tool to help your practice succeed



Did you notice Marc actually covers several of these in his throwback articles? Very important question - Is Marc psychic?

## DISABILITY & INSURANCE DENIALS



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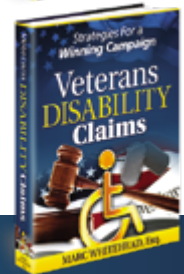
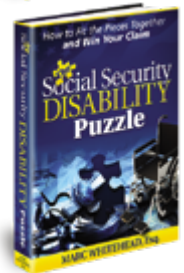
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