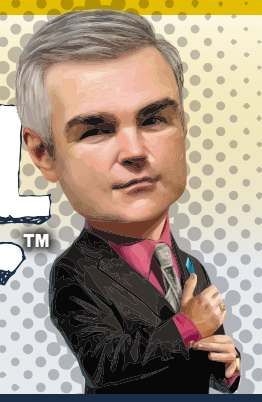


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## LAST QUARTER, MWA'S CORE VALUES GOT A FACELIFT. And what better way to celebrate than to make everyone churn out an article?

In this issue, we're tackling our core value Health & Happiness. We're covering the burning topics everyone's dying to know about, like four legged friends, vacation, and personality testing. Wondering how these all tie into Health and Happiness? *Keep reading... if you dare.*

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## Using the Platinum Rule and the DISC Profile to Promote Happiness in Your Law Firm

Today, I want to introduce a concept that has been instrumental in evolving my approach to leadership at my law firm—the DISC assessment.

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### NEWS FLASH!



Going Live July 2024!

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The DISC test is a behavior assessment tool based on the DISC theory, which classifies four main behavioral traits: Dominance, Influence, Steadiness, and Conscientiousness. This test involves a series of questions that gauge how one responds to specific situations, with the results categorizing one's behavior into these four styles. Understanding and applying these insights has reshaped how I manage and interact within our firm, offering significant benefits I believe can extend to your practice as well.

We now DISC test every employee, from myself as managing partner on down to the youngest clerks. All DISC tests are kept in a central folder on our server and are available for everyone to review, including mine. We frequently talk about our DISC results when dealing with each other. Everyone knows who is a high D, I, S or C. It helps to know how everyone ticks. It helps to know how everyone wants to be treated. The DISC profile goes on to explain how certain types want to be communicated with and how they in turn tend to communicate back to you. It has become real game changer. I am being to encourage everyone to put on their door or cubicle what their DISC personality type is for the world to see.

## Understanding DISC and applying the Platinum Rule

DISC stands for Dominance, Influence, Steadiness, and Conscientiousness. Developed by psychologist William Moulton Marston, DISC categorizes four primary behavioral styles that help us understand how individuals may react under stress, collaborate, and communicate in the workplace. While it initially aimed to predict job performance, it has found its true utility in enhancing interpersonal relations and leadership.

## Detailed Descriptions of Each DISC Type

**1. Dominance (D):** Individuals with a Dominance style are driven by results and authority. They prefer to lead rather than follow and thrive on competition and challenge. They are direct, decisive, and often high-energy. In a law firm, a 'D' type might be the partner who pushes the team hard to meet aggressive targets, prefers quick decisions, and cuts straight to the chase during negotiations.



**2. Influence (I):** The Influence group is characterized by their sociability, talkativeness, and persuasiveness. They are often optimistic, open, and genuinely enjoy collaborating with others. 'I' types are great at motivating the team, excel in client interactions, and often bring a creative flair to problem-solving. They are the ones who lighten the mood at the office and foster a sense of camaraderie.

**3. Steadiness (S):** Steadiness personalities value consistency and quality. They are cooperative, dependable, and very supportive of others. 'S' types prefer a stable environment and value deep, long-lasting relationships. In the context of a law firm, they are the backbone of the team,

often handling the meticulous, day-to-day tasks that keep the firm running smoothly.

**4. Conscientiousness (C):** Those who exhibit Conscientiousness are detail-oriented, precise, and analytical. They value independence and accuracy. 'C' types are meticulous with a strong focus on quality and efficiency. They are the partners or associates who ensure that every 'i' is dotted and every 't' is crossed, essential in the precise field of law.

## From Dominance to Diplomacy

Reflecting on my early years as a managing partner, I often leaned heavily on my Dominance style—making decisions quickly and directing the team with little consultation. This approach sometimes led to misunderstandings and a lack of true consensus. Learning about DISC prompted me to consider the diverse needs and preferences of my team, leading to a more inclusive approach. (Note the Dominance style is not my natural tendency but many leaders adopt this style when they wear the crown.)

## A Real-Life DISC Detour

Consider a scenario where a major firm decision is up for discussion: Initially, I might have barreled ahead with little input. However, understanding DISC, I now begin by sharing detailed data, appealing to the 'C' types, and building consensus among the 'S' types, while keeping the process engaging for the 'I' types.

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*“Talent wins games, but teamwork and intelligence win championships.”*

– Michael Jordan

# TAKING VACATION



**Think about the last time you took a long vacation. If that's difficult to recall, pull out your calendar and get one on the books as soon as you can! Or, if you've vacationed more recently, how did you feel upon return? Were you anxious and stressed about clients, emails, deadlines, personnel issues, etc.?**

For the most part, same, same, friend (*think Gob Bluth and Tony Wonder from Arrested Development, and if you don't understand, watch it, it's one of the most underrated shows ever written!*)! I have been coached by Atticus for years now and it has been



a slow crawl to my understanding that vacations are necessary and should recharge you, not deplete you as I have often felt.

**Never apologize for taking vacation.** It is not only oftentimes built into your employee-benefits package, but it is vital for you to maintain your best self. You aren't doing anyone favors if you cannot bring your all into the courtroom when it's time. Copious studies show that relaxing time away can decrease stress and increase motivation, often with the added benefit of providing clarity, as well. When our minds aren't constrained by mounting daily obstacles, our minds can process information more fluidly. In turn, we find the necessary restoration from a much-needed time-out. The Golden Goose analogy from my Atticus coach resonates with me—if you had a golden goose laying expensive golden eggs, you'd do anything to take care of that goose, wouldn't you? You would make sure it was comfortable, happy, and rested so that when it came time for it to go to work and lay those eggs, it would produce the best eggs possible, right? The twist is that **YOU** are the Golden Goose. You must take care of yourself by giving yourself the space, rejuvenation, and meaningful connections you crave in order to be a great lawyer, a great anybody.

Now that we are in the right mind-set for leaving the office,



## Learn to Unplug.

This, of course, can be intensely difficult. For years, a reoccurring breakdown of my travel followed this draining pattern: crushing tasks with everything squared away by my departure (*which coincidentally leaves me needing a break even more*), traveling with family, then continuing to compulsively check email/calendar/texts from staff/colleagues/opposing counsel to reduce my returning responsibilities, shoving complex email to-do's into folders that I can deal with more appropriately once I've resumed my three-screen office set up, and returning from said vacation exhausted, dreading those action-items I have had yet to tackle. More so than any other profession, lawyers are expected to work 24/7, and like it (*or not but who cares*). Someone, somewhere, solidified the ridiculous creed for lawyers that we are supposed to maintain ourselves as readily available for counsel, for anything, at any given time.

Are you surprised that this culture flaw is one of the main reasons so many in our line of work leave or meet disastrous ends? It doesn't make me or you a better lawyer, partner, or employee to always be "on."

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# VACATION METHOD.



If you've worked with me, you may know that I work very hard and play harder. Why would I choose to do one of the most demanding occupations on the planet if I'm not afforded the opportunity to explore that planet every once in a while. I've been asked to write an article detailing the art of vacationing, so I'll do just that.



**1 UNPLUG**  
I'm a firm believer in quality time. To the extent possible, I try to put my phone or computer away when I'm spending time with others. This goes double for travel. You spend all day every day with a device (or three) within arm's reach, don't waste your coveted time off glued to your phone and computer checking on the work you're missing. Trust me, it will be waiting for you when you get back.

**2 PLAN AHEAD**  
Get your vacation on your calendar early so you can clear a path for time off. It's much harder to clear free time once work takes over. Also, work hard before your holiday and try to get ahead of your deadlines. Do you have a big trial coming up? Why don't you just schedule a mediation with me, and let's knock that case out together. (contact info on the back of this rag 😊)

**3 GIVE YOURSELF SOME CUSHION**  
Block off your work calendar a day or so ahead of and after travel days. I likely still work on these days but saying I'm "OOO" saves my calendar from filling up and saves my time blocking. Of course, try to anticipate problems and get in front of them.

**4 ASK FOR HELP**  
Find someone in your office who can triage issues while you're away and give their contact in your automated emails. Promptly treat them to breakfast tacos, coffee, or lunch when you return, especially if there were any blowups in your absence. Souvenirs are also appreciated.

**5 TRAVEL WITH PURPOSE**  
I usually try to challenge myself mentally, physically, culturally, or all the above. Try to learn about where you're going. Do a tough hike or activity. Attempt to learn the language. Don't

do the easy tourist thing, get out of your comfort zone! That always makes travel feel more fulfilling and authentic to me and helps get my mind off work.

**6 TRAVEL WITH TOOLS**  
I don't mean lame people, although that could apply to traveling with me. That is because those who have traveled with me know I'm annoyingly pleased with my travel credit card. There are so many perks; it's fun to try to take advantage! I'm talking about lounge access, hotel/ rental upgrades and status, travel insurance, no foreign transaction fees, favorable point values, menu of excursions or activities to help you book your trip. I'm not sponsored so I won't name drop my card but call or email me and I'm happy to share.

Take my advice, or don't. I don't care as long as you find a way to get some much-needed R&R. Like my imaginary travel agent always says, "there's more than one way to book a flight." **At the end of the day, just make sure to take some time for yourself, however best works for you!** 😊

*"Almost everything will work again if you unplug it for a few minutes ... including you."*

– Anne Lamott

# FROM Burnout AND Back Again!



Hi, I'm new here. 🙋

While I've been with MWA since 2018 in the Fall of 2022, I was promoted to Marketing Manager. With the new position came a

mountain of new tasks and a major learning curve. With a to-do list a mile long and a to-learn list that was even longer, it was all I could do to keep my head above water. I started coming in at 6 am and often looked up at 6 pm. Often, I realized that I hadn't eaten, drank water, or stood up all day. I wore this like a badge of honor. Look at what a dedicated and hard worker I am.

After a year of running myself ragged, my husband, Bill, spoke up. Bill is the Xanax to my anxiety, the janitor sweeping up the confetti behind the chaos that is me. He doesn't express concerns about my behavior or habits often, so when he does, I listen. I hadn't noticed that I was sleeping less and less or that I came home every day with an "empty tank" and no interest in spontaneous date nights or simply watching a movie together.

## Something had to give...

This wouldn't be an article in the **Successful Barrister** if I told you I woke up the following Monday as a new woman—one who worked 8 hours a day, took a lunch break every day, and meditated in the afternoons.

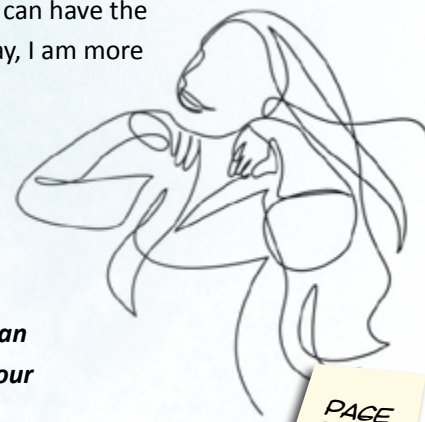
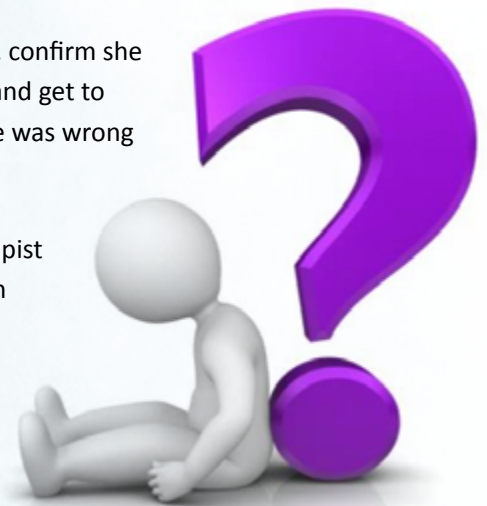
I discussed this with my therapist, and he suggested I bring my puppy, Pepper, to work with me every Friday. (Yes, a 10-year-old Yorkie is classified as a puppy.) I was convinced she would be a distraction, and I wouldn't get any work done while she was there. I figured I'd bring her with me every



Friday for a month, confirm she was a distraction, and get to tell my therapist he was wrong (for once.)

Naturally, my therapist was right, and soon Pepper was joining me at the office every day. She quickly became the office mascot, winning over my colleagues with her wagging tail and infectious energy. Suddenly, I found myself actually looking forward to going to work. Meetings, both virtual and in-person, were instantly better because, let's face it, who doesn't love a dog cameo? Her presence provided a calming effect on everyone, not just me. It turns out having a canine co-worker brightened up the whole office. Pepper forced me to take short breaks, get outside, and decompress. I started finding a balance and, shockingly, learned to prioritize my well-being over my never-ending to-do list.

My journey from overwhelming stress to a more balanced life didn't happen overnight, nor was it without its challenges. But with the support of my husband, Bill, the guidance of my therapist, and a few surprisingly effective tricks—like the magical presence of Pepper—I found a way to manage my responsibilities while also taking care of myself. It's essential to recognize the signs of burnout and take proactive steps to address them. Sometimes, the simplest changes, like learning to say "no" or taking a break to play fetch, can have the most profound impact. Today, I am more productive, happier, and healthier—and guess what? The world didn't end because I took a lunch break. **So, if you find yourself drowning in work, remember: your to-do list can wait, but your sanity and your dog can't.** 😊



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# Approach to Taking a Vacation...



SELINA VALDEZ  
MANAGING ATTORNEY  
VETERANS DISABILITY

## Where do you like to travel to?

I love anywhere I can get to in less than four hours and that serves Tito's. I'm a simple girl, I really am. In another life, I worked in the oil & gas industry (as a non-lawyer) and spent quite a bit of time traveling the world. I've seen the likes of Australia, Singapore, Indonesia, China, Japan, and Europe. Needless to say, I've had my fill of long-haul flights, so I prefer to not spend my vacation time breathing recycled air and observing passengers' odd behaviors. In all my travels, I have seen some breathtaking sunsets, met some amazing people, and tasted food I can only dream about. But with those miles, came quite a few lessons I have learned when it comes to traveling for work or personal reasons. Marc asked me to share some, so here are two:

**1 | Block that calendar.** Block it like you're Beyonce and tell everyone "Sorry, I ain't sorry." Not only do I block my calendar for the days I'll actually be gone, I block time periods to help me prepare for my departure and catch up upon my return. In preparing for the departure, you should know by now that something always comes up. Someone will drop a bomb on your desk, and you will have to "figure it out" before you can put on that Coppertone. So why not anticipate and prepare for it? As for the return, set a small time block to catch up and set some meetings with your core team members. This will give you an opportunity to touch base with them and make sure they aren't hiding something from you because you were "out."



**2 | Pack these essentials in your carry-on:** hand sanitizer, chapstick, toothbrush & toothpaste, one day's worth of clothing, phone charger (*portable one too, if you can*), and some cash. Also, always buy or fill up a bottle of water before you get on the plane. I stopped counting the number of times I had to sleep in an airport, randomly deboard a plane, sit on the tarmac for HOURS, or be rerouted to a different airport. Whether it was weather related, crew related, or plane related, I have experienced some interesting travel adventures. (*Next time we see each other, ask me about my experience with a customs agent in Australia.*) While I hope you never need these items from your carry-on, if the day comes that you find yourself in a similar situation, you will be grateful you have them.

In the time it took me to write this article, Marc has sent two pictures from Hawaii. Way to kill my motivation, Marc. I hope your flight gets delayed.

*With the summer season upon us, safe travels wherever life's journey takes you. Until next time... 😊*

*"A journey of a thousand miles must begin with a single step."*

*- Lao Tzu*



# Using the **Platinum Rule** and the **DISC Profile** to **Promote Happiness** in Your **Law Firm**

*Continued from page 2*

This comprehensive strategy not only builds true consensus but also enriches the decision-making process by incorporating a range of perspectives.

## Why It Matters to You

Implementing DISC and the Platinum Rule can profoundly impact your firm's dynamics, enhancing team morale and productivity. Understanding and adapting to the varied DISC styles within your team allows you to leverage each member's unique strengths, leading to a more harmonious and effective workplace.

## Embracing Change

By adapting your leadership to fit the diverse needs of your team, you create a more inclusive and positive work environment. This shift can lead to significant improvements in how your team operates, feels, and delivers results.

## Conclusion and Thought-Provoking Question

As you reflect on your leadership style and the dynamics of your team, consider how a deeper understanding of DISC and the Platinum Rule might alter your approach. What changes could you make to better align with the individual styles and needs of your team members? How might this shift enhance not only your practice's efficiency but also its overall atmosphere?

*If you are interested in using the DISC assessment, there are free versions available if you Google it. However, we prefer a more advanced DISC assessment that Atticus provides. It costs about \$65 per test (I think) but provides a great in-depth analysis. If you have any questions, please reach out to me at [marc@marcwhitehead.com](mailto:marc@marcwhitehead.com). 😊*

# TAKING VACATION

*Continued from page 3*



While it is easy to justify a working-vacation with so much on your plate (*after all, if you keep chipping away at your docket, surely that first week back will be easier, right?*), you sacrifice an opportunity to recharge and renew the vigor for your work. You develop the ever-building sensation of burnout. More importantly, you lose the unabridged opportunity to connect and build lifelong memories with your loved ones by never being fully present.

**Plan Space & Delegate.** The best advice I have been given in approaching vacations is to plan the time away in advance, giving yourself space around that time to tackle work before you leave and catch up once you return, and importantly, organize things so that the work can move forward in your absence. Make sure your delegation skills are up to par and you aren't bottlenecking work because you are the only answer. Have a plan in place and stick to it. As to the former recommendation, block that calendar out! And if your plane lands at 11:30 am upon return, maybe let everyone else think you are traveling for the rest of the day so that your colleagues don't parachute into your day with things that can wait until the following morning!

Truly though, I am still a work in progress on unplugging and recharging, so feel free to be my accountability partner in this regard.

**Send me your advice, your vacations spots, and your photos for inspiration (my family likes all things, sand and snow)!! 😊**

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# Lawyers Need a Laugh

## Inspired? Eager to focus on improving your health and happiness?

Below are a few tips, but only some are suggested to help you live a happier life. Email your guesses to [marc@marcwhitehead.com](mailto:marc@marcwhitehead.com) and maybe you'll see a little happiness in your inbox.



- Connecting with People
- Set Goals
- Eat Junk Food
- Practice Mindfulness
- Focus on the Negative
- Stop Learning, You're Smart Enough



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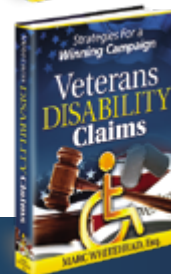
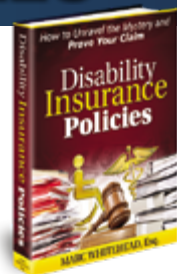
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