

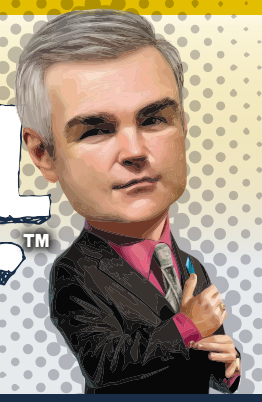
Jul/Aug 2024

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

Vol. 10 Issue: 04

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In this issue, we're turning up the heat on a hot topic: **Firm Culture.**



As discussions about workplace culture heat up across the nation—much like the sweltering Texas sun—we're here to show you how to make your environment not just another buzzword but a real driver of success. Forget the cliché perks—it's about the shared values and dynamic interactions that actually matter.

Ready to see how you can elevate your firm's culture and make it stand out? Dive in and find out how to make your culture not just good, but truly sizzle!



MARC WHITEHEAD
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Creating Your Own User Manual: A GUIDE FOR LAW FIRM LEADERS

In the last issue of the \$B, I discussed using the DISC Profile test as a way to "treat others the way they want to be treated" or what is known as the Platinum rule. But how do you get others to treat you the way YOU want to be treated. Here's an idea, CREATE YOUR OWN USER MANUAL!!!! Why make your people guess about how you wanted to be treated, TELL THEM!!!

Today, let's explore the concept of creating a personal user manual—a strategy that complements our understanding from DISC assessments and enhances team dynamics significantly. Also, I want to introduce an additional personality test that could be a game changer for you, the Clifton Strength Assessment. (Note, this article inspired by my reading of *The Chief Executive Operating System* by Joel Trammell)

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Understanding the DISC and Clifton Strengths Assessments

Before integrating these insights into our user manuals, it's essential to understand what the DISC and Clifton Strengths tests are:

The **DISC Assessment** categorizes behavior into four primary styles:

DOMINANCE (D):

Focused on results, assertive, enjoys overcoming challenges, prefers leading.

INFLUENCE (I):

Persuasive, sociable, effective in teams, excels in engaging others.

STEADINESS (S):

Dependable, values stability, great team players, enjoys consistent routines.

CONSCIENTIOUSNESS (C):

Detail-oriented, prioritizes quality and accuracy, values independence.

The Clifton Strengths Assessment

identifies a person's top talents from 34 themes grouped into four domains:

EXECUTING:

Strengths that help you make things happen (e.g., *Achiever, Consistency*).

INFLUENCING:

Strengths for taking charge and ensuring voices are heard (e.g., *Activator, Maximizer*).

RELATIONSHIP BUILDING:

Strengths for building strong teams (e.g., *Empathy, Developer*).

STRATEGIC THINKING:

Strengths that assist in making informed decisions (e.g., *Strategic, Analytical*).

Understanding these assessments can enhance how we tailor communication and leadership within our teams.

Why a User Manual?

Despite the insights provided by tools like DISC and Clifton Strengths, no single assessment can capture the full spectrum of an individual's behavior and work style. A user manual fills this gap. It's a self-authored document that outlines how you operate, what you expect from your colleagues, and the quirks that make you unique. I am still experimenting with this idea, but I hope it can be a gamechanger.

Developing the User Manual

Inspired by the need to be better understood, I am creating a document listing important points about how I operate. This includes my preference for email over phone calls, keeping it short and sweet, the fact that I will not read an email over 40 words long.

Guidelines for Writing Your User Manual

If you're considering drafting your own user manual, here are some steps to guide you:

1 Identify Your Quirks: Focus on traits that define your leadership style, integrating insights from DISC and Clifton Strengths to provide a full picture.

2 Be Actionable: Specify your preferences and expectations clearly; for example, how you like to receive feedback or how you make decisions.



3 Seek Feedback: Share your draft with trusted colleagues to ensure it accurately reflects how you see yourself and how others perceive you.

"Coming together is a beginning. Staying together is progress. Working together is success."

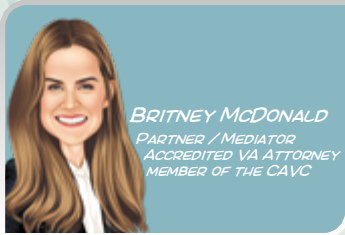
– Henry Ford

4 Update Regularly: Your user manual isn't set in stone. As you grow and evolve, so should your manual, integrating new insights and experiences.

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Client-Centered Culture



In our profession, these days it is easy to find lawyers who tout their professional degrees and spend much of their time talking over the heads of their clients. After all, we each spent years preparing in academia to attend law school, then spent a great deal of time in school and interning to learn how to practice, and now have spent many years fine tuning that practice.

The clients rarely have much legal knowledge when they seek us out, as they are hiring us for our knowledge, skill, and experience. Naturally, because we are surrounded by courts, judges, and rules of law day in and day out, we tend to let these technical legal experiences influence the way we think and the manner in which we interact with our clients.

Of course, having a lawyer speak about court, precedence, and using other legalese can be quite intimidating (*even off-putting*) for our clients. The law is typically uncharted territory for most clients until they find themselves in need of our education and skills; for many, the idea of being wrapped up in a legal battle is quite scary. When lawyers talk down to their clients, it compounds an already unsettling situation. Just like doctors are expected to communicate with and comfort their patients on some level,

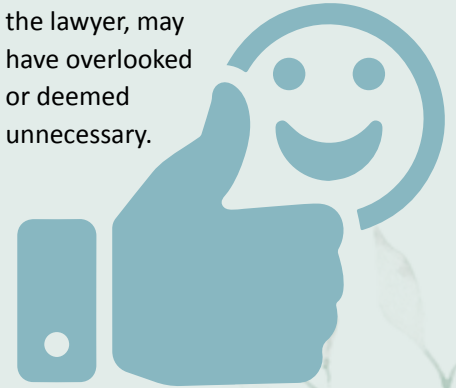
successful lawyers should be able to similarly interact with their clients.

Show the people who drive your business compassion; empathize with them and engage in candid discussions about their situations. Remove the fear and unknowns; focus on building a relationship based in mutual trust. After all, you need them as much as they need you to find success. Your clients hold the keys to information that can make all of the difference in their cases; it is simply our touch that skillfully brings favor to that information.



You should aim to illuminate the issues within each of your clients' cases. Help them to understand the options they have and how those different options may affect various areas of their lives. Educate your client. It is also just as important to follow up with your clients on these very important conversations, as clients' number one complaint tends to be focused on communication, or lack thereof. The way in which we communicate to our clients, the frequency, consistency, and manner, affects how the relationships

between you and your clients grow. Your clients need all of the important details and similarly need the opportunity to be heard. They often are aware of particular pieces of information that you, as the lawyer, may have overlooked or deemed unnecessary.



Obviously it is up to the lawyer to decide what is pertinent to the case with the client's end-goal in mind; however, maintaining a good relationship with your clients means that you address each of their concerns so that they feel "*heard.*"

Even more importantly, as you may likely be only one of many people interacting with the clients at your firm, empower your team to focus their efforts on the clients, as well. From the individual who greets the clients at the door or on the phone, to the file clerk who takes care to handle the clients' files in a professional and meticulous manner, to the attorneys and case managers who strategize theories and have direct contact with these people, all team members must be able to show empathy, a willingness to help, and maintain a goal of client satisfaction.

Set a standard of care for each of your departments. When it comes to client communication, make known to your clients that standard so that you are held accountable.

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FIRM CULTURE: The Secret to Higher Profits



Firm culture has become the new hot topic. But what is it exactly? I have heard it defined as your rituals, norms, and traditions. But what I didn't realize is that it is both internal and external; it is in the way you treat your team and in the way you treat your clients. Your firm culture is evident in the way you offboard team members and in the way you answer your phone.

We have one. You have one. We all have one.

Even if you don't think you have a culture at your law firm, you do. We wanted to know what our team members thought our firm culture was, so we asked them. I shared this word cloud in my last article, but I thought it worth sharing again. This is how our team describes our firm.



As we grow, one of our greatest challenges is maintaining the great things about our firm culture while also creating a scalable environment.

If you don't know what your firm culture is, ask your team. You might be surprised who is leading your firm culture.

Why Firm Culture Matters

It is self-evident that as a services business, turnover creates disruption, which will impact your profit. If turnover is a problem in your firm, look at your firm culture.

Marc has always done a great job of creating a fun, uplifting work environment. We participate in an annual Thanksgiving Potluck, hold a Fantasy Football Draft, and vote in a Valentine's Day bakeoff.

Firm culture, as with all things that matter, requires intentionality, leadership, and courage. Post-COVID, as many firms did, we experienced hiring challenges, which led us to focus internally on how to prevent turnover and also how we can attract the talent we want to hire.

Leveling Up Your Firm Culture

Our next steps are to utilize the Gallup employee engagement survey to challenge us to continue to improve our firm culture. Gallup suggests that there are twelve needs that managers can meet to

help improve employee productivity. Our five-year goal is for employee engagement to be at 95%.

We will also institute a Firm Culture Committee this year to help us plan our events and to serve as ambassadors for our firm culture. Select team leaders and managers have helped us plan different firm culture events, but we want to give our team members a voice in shaping our culture as we grow.

More than Increased Profits

If you are not sure where to start, I highly recommend reading **Power of Moments** by Chip Heath and Dan Heath. The book lays out the different ways you can create intentional moments in your client relationship and also within your team.

"It's better to have a great team than a team of greats."

– Simon Sinek

I highly recommend googling the **EOS** checklist on building an intentional culture. The quiz will help get you started on how you are doing with your firm culture based on how healthy and how intentional your business is about your culture.

Build your firm culture, not just because it costs you money if you don't. The pursuit of a healthy firm culture with engaged team members is one of the hardest parts of being a manager. It is also the most rewarding. 😊

FIRM CULTURE: **More Than Just PIZZO Parties!**



authentic communication about what the company stands for. Leaders need to walk the talk—if they preach transparency and respect but spend their days holed up in their corner offices, that pizza won't do much to disguise the disconnect.



Trust and respect are the real ingredients here.

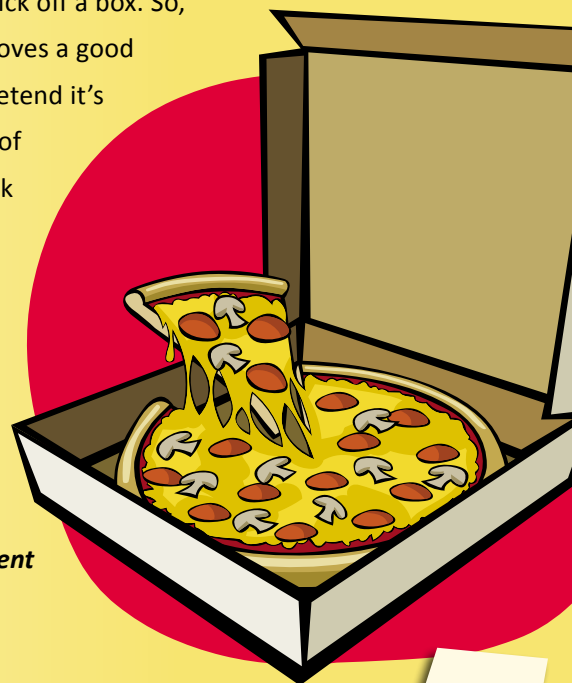
Employees don't just want to feel like they're part of a team—they want to know their voices matter. Regular feedback and real recognition are essential. Offering opportunities for professional development and career advancement goes a lot further than a cheesy pizza party in building loyalty and satisfaction.



In the end, if you think quarterly pizza parties will

cover up a lackluster culture, think again. A vibrant, effective firm culture is about embedding values into everyday practices, not just occasionally throwing a pizza party to tick off a box. So, while everyone loves a good slice, let's not pretend it's the cornerstone of an enriching work environment.

True cultural engagement demands much more—authenticity, respect, and a genuine investment in employees' growth. 😊



MACKINLEY
TATOM
MARKETING MANAGER

When it comes to firm culture, let's be clear:

Tossing out a few boxes of Little Caesars pizza every quarter

doesn't cut it. Sure, free pizza might momentarily distract employees from their endless stream of emails and deadlines, but it's not exactly the secret sauce for building a thriving workplace culture.



Firm culture isn't just a trendy buzzword—

it's the backbone of a successful organization. It's what happens when shared values and behaviors guide every interaction, decision, and strategy within the company. When employees feel a deep connection to the company's mission and values, they're more engaged and productive. Unfortunately, nothing about pizza parties screams "we value your contribution" or "we're invested in your career growth."



Let's face it: Creating a genuinely effective culture requires more than just a slice of pepperoni. It demands genuine commitment from leadership, starting with

FIRM CULTURE



A normal weekday in my life looks like this: I wake up at 5AM, go to the gym, come home, get ready for work, leave for the office at 8AM, work, get home around 6PM, relax, eat

dinner, go on a walk, and then I go to bed around 9:30PM. Wash, rinse, repeat every Monday through Friday. Clearly, a majority of my weekday is spent in the office. It would make sense that I would want that time to be spent doing a job I love at a firm I love to work at, right? Hint – *the correct answer is yes.*

Me, like many other Americans, spend more time with our coworkers and at our jobs than we do with our families at home. This is why it is so important for a company to possess a great workplace culture. Workplace culture, as defined by Forbes, is *“the shared values, belief systems, attitudes and the set of assumptions that people in a workplace share.”*

Work environment/culture can make or break a job in my opinion. You can LOVE what you do, but not love where you work. That is an unfortunate reality for many of those in the workforce. For the majority of my jobs since high school, I loved my jobs and where I worked! But I have also worked at places where I loved what I did, but the company itself just wasn't for me. I knew in my career as an attorney, I wanted the best of both worlds.

I interviewed for a law clerk position with Marc Whitehead and Associates in 2020. I specifically remember asking the interviewers (*shout out to Anthony, Selina, and Britney*) *“what is the work environment like?”* I heard horror stories of disorganized firms, attorneys

who have no work/life balance, and managers who strictly see you as an employee and not as a person... I knew I didn't want that in my career. The answers I got were extremely positive.

After accepting the job and working as a clerk for a few weeks, I quickly realized that the attorneys weren't lying about the work environment and culture of the firm, that the employees were valued and respected, that there was set core values that each employee adheres to (*and bonus, align with my own personal values*), the list goes on and on.

Fast forward 4 years (almost to the date) and I am back at Marc Whitehead and Associates as a junior managing attorney. I started as someone who loved working here because of the work environment and culture and am now someone who has a say and plays a part in creating that same environment and culture for the rest of the team. I think because of this, I can bring an interesting perspective to the others in leadership roles. I was in the team members' shoes just recently and may be able to relate to them in ways others cannot.

“The strength of the team is each individual member. The strength of each member is the team.”

– Phil Jackson

Ultimately, a positive workplace culture is an integral part of any firm. I have witnessed (and experienced) the difference environment and culture can make in the quality of work product and the attitudes of team members. There is a saying that states something like *“do what you love, and you'll never have to work a day in your life.”* Well, I think in reality, if you do what you love, in addition to loving where you work, you'll never have to work a day in your life. 😊



Creating Your Own User Manual: A GUIDE FOR LAW FIRM LEADERS

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Benefits of a User Manual

The user manual does more than clarify your quirks; it fosters a culture of openness and understanding. At our firm, we regularly talk of each other's DISC style. This is the first step. Taking this to the next level, I intend to require all team members to create their own user manual. These documents will be shared within teams, helping everyone understand and appreciate their colleagues' unique traits and preferences.

Conclusion

As leaders, we must recognize that our strength lies not only in our expertise but in how we connect with and lead our teams. A user manual is a simple yet powerful tool for enhancing these connections, ensuring that we lead not just with authority but with understanding and respect. ***So, what unique quirks would your user manual reveal? How could this tool change the dynamics within your firm? Let me know your thoughts at marc@marcwhitehead.com.*** 😊



Client-Centered Culture

Continued from page 3

Communicate early on what the client can expect from each of your team members, *e.g. the case manager will always call back within two hours, the attorney will set conferences to discuss the case before each hearing, etc.* Instill in your client base that your team is reliable and trustworthy. Make sure to document your dialogue with clients so that the next time a team member speaks with them; everyone is on the same page and can seamlessly pick up where you last left the conversation.



Similarly, when a mistake is made or a client is unhappy with the firm's service, set standards of care that your clients can rely on to be heard and issues corrected. Listen to the concerns fully. Document the problems. Let them know your team is working on a solution and actually make that happen!

The client needs to be heard and understood, but even more than that, the client needs to be respected. The people who reach out to us are enduring a difficult period in their lives and likely are uncomfortable with the lack of control they have over their situations. Ensure that they find that control with you and your team members, that they are able to place trust in you to do your best for a better outcome.

After all, this is a service industry and we are here to help people who desperately need it! ***Truly though, I am still a work in progress on unplugging and recharging, so feel free to be my accountability partner in this regard.*** 😊

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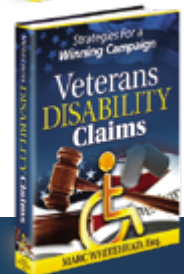
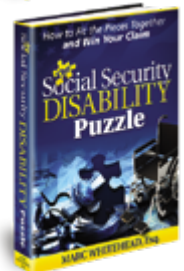
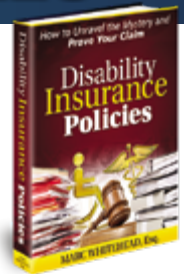
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