



# **Slay the Summer: Killer Tools You Can Master (And Alan Gassman on the Hot Seat)**

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# TOMORROW !

Join me tomorrow at 11:00 am in a zoom call if you have any questions or would like to discuss anything relating to your career, personal success or otherwise.

Please join me in a Zoom call tomorrow at 11:00 am.

Whether there is one or twenty I will answer any questions.

You can wear a mask if you want to remain anonymous.

If you want an invite to this or a copy of this PowerPoint deck email [alangassmansuccess@gmail.com](mailto:alangassmansuccess@gmail.com)



# Famous Quotes

“You have to quit something before you can do something else.”

- Professor Drucker

“It’s the 5% best part of every business that should be accentuated, improved and expanded, and what parts of the 95% can be discontinued or contracted to allow for maximized profitability and enjoyment.”

- What David Finkel told Alan Gassman



# More Famous Quotes

“The way to a healthy, balanced existence is to eliminate the patterns and situations from your life that have no meaning.”

- Manly P. Hall

“Finish this day and be done with it. You have done what you could. Some blunders and absurdities no doubt have crept in; forget them as soon as you can. Tomorrow is a new day. You shall begin it serenely and with too high a spirit to be encumbered with your old nonsense.”

- Ralph Waldo Emerson



# First Year Lawyer Success Tips

1. Always show up with a legal pad and two pens in hand.
2. Answer questions as concisely as possible and see whether more information is requested. Don't try to explain anything beyond the absolute minimum information that the person needs when that person is another lawyer that you are working with. The person you are interacting with, be it client or other attorney, will ask you what they need to know in addition to that.
3. Show up to a meeting with a memo you wrote on the topic to be discussed, and hand it to the lawyer you prepared it for. Bring an extra copy so you have one, too. They can glance through the memo and ask you what they need to know.
4. Smile and be cheerful. If there is a serious situation, be serious, but in overall everyday interactions, be as friendly and humorous as you can.
5. Say hello when you first see someone at your office during the day, and then say goodbye at the end of the day.



# First Year Lawyer Success Tips (Cont'd)

6. Become the organizer of anything and everything that you are involved with. Use checklists, progress reports, and reminders. Once you manage a project, you “own it” and will become the go-to person. Always have your checklists and the latest progress on each item you are working on with you for meetings or otherwise. You never know when you will be asked about them.

7. Consider sending anyone in the office that you have a project in progress with an email every evening at 7:00 PM enclosing where you are or anything they may want or need to see about the project. You can accomplish this by utilizing the delay function on your emails.

This email will (1) remind them that you are working on this and (2) establish a habit so that your colleagues know they can go to their 7:00 PM emails to access what you have been working on lately. Your colleagues will quickly learn that the 7:00 PM space in their Inbox always belongs to you!

8. Work constantly to improve yourself beyond the law and what you do as a lawyer. Concentrate on what you like to do and do best to the extent that it is productive.

9. Always accept new work willingly and enthusiastically, but never restrain from mentioning that you will need to have it prioritized if there are other things that may not be done on time. The assignor is possibly not aware of what the new work might delay.



# First Year Lawyer Success Tips (Cont'd)

10. Consider always having a list of tasks in progress with an extra copy that you can hand to your supervising lawyer and go over whenever they might ask.
11. Ask for periodic feedback. In particular, ask, “What would you like for me to change in the way that I am doing things to improve your use of me and my productivity for the firm?”
12. Always sincerely compliment as many people as you can as often as you can within the firm and outside the firm. What goes around comes around, and you need all of the good karma you can get!
13. Draw up charts whenever you can to simplify matters, for purposes of memory, and for purposes of explanation. Charts with squares, circles, and lines can help significantly towards Confucius’s observation that a picture is worth a thousand words. Learn how to make charts in Excel and bring charts to meetings whenever you can with all key information that needs to be remembered for each particular client.
14. Consider carrying a Dictaphone with you at all times, and offer to record any instructions or explanations that anyone is giving you to help make sure you get it right later. This allows people to talk faster and to provide you with assignments quickly, knowing that you will review every word of what they have said.



# First Year Lawyer Success Tips (Cont'd)

15. Enter your time contemporaneously onto a written time slip and/or computer, and make sure all your time is entered by the end of each day. Enter all time, including time you have wasted. Make separate entries for time that you know is billable and the time that you think may be reduced or not billed for at all. Let the senior lawyer make this final decision; there may be more usable time than you think.

Firms expect to write a lot of time off, and if you are spending significantly more time than they expect, it is good for you to know and for them to know earlier rather than later.

You can have brief discussions from time to time when you feel that your wheels have been spinning or that you have wasted a lot of time. Use an apologetic tone. This is part of the mentoring process. The senior lawyers in your firm also write off a lot of time. It is a lifelong experience of an attorney to do so, so do not be bashful about it.

16. Have the time of your life! Find what you like best about the practice of law and do that as much as you can, while ever improving and endeavoring to make 85% or more of your time in the office thoroughly enjoyable and satisfying. If you can do this, there is no doubt that you will have every success in your career, not to mention your personal life. Your wallet will thank you also!





# YOUR MISSION AS A SUCCESSFUL PROFESSIONAL

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1. TO DO THE RIGHT THINGS FOR THE RIGHT PEOPLE.
2. THE MORE PEOPLE THAT YOU HELP, THE BETTER JOB THAT YOU ARE DOING FOR SOCIETY.
3. ONCE YOU HAVE DEVELOPED YOUR SKILLS AND SYSTEMS, YOU NEED A SUFFICIENT VOLUME OF PAYING WORK TO BENEFIT FROM THIS.
4. SUPPORT YOURSELF, YOUR FAMILY AND YOUR RETIREMENT FINANCIALLY AND NOT BE UNDER SIGNIFICANT FINANCIAL PRESSURE.
5. HAVE A GREAT TIME DOING THE ABOVE 85% TO 90% OF YOUR WAKING HOURS.



# Write Down 3 Things You Want to Get Out of This Workshop:

Examples include:

- Marketing ideas.
- A solid plan to take at least one step forward.
- Comic relief.
- More free time.
- Doing more of what I like to do.
- Doing less of what I do not like to do.
- Making sure that no one talks badly about me.
- A better relationship with my spouse or significant other.
- A better relationship with my children and/or parents.
- Less guilt about the things that I could not accomplish or the things that were not done properly.
- Having time to do something that I am passionate about.

*Choose a job that you love, and you will never  
have to work a day in your life.  
-Confucius*



# 3 THINGS YOU WANT TO GET OUT OF THIS WORKSHOP

Item	Why is this important?	Next steps forward.
1. What to expect in the work force	Because you want	continue taking
	to be prepared.	and/or watching
		courses similar to
		this.
2. How to find something you enjoy doing & make a profit.	Because you want	Try new things
	to do something	& get out of your
	you enjoy	comfort zone.



# 3 THINGS YOU WANT TO GET OUT OF THIS WORKSHOP

Item	Why is this important?	Next steps forward.
3.  Learning new techniques to adapt to the work force	BECAUSE IT IS important to keep	- TAKE CLASSES - VOLUNTEER
	UP WITH the latest techniques that	- ASK YOUR family & friends
	your potential competitors are	
	using.	



# 3 THINGS YOU WANT TO GET OUT OF THIS WORKSHOP

Item	Why is this important?	Next steps forward.
1.		
2.		



# 3 THINGS YOU WANT TO GET OUT OF THIS WORKSHOP

Item	Why is this important?	Next steps forward.
3.		





## STUDY BACKS UP STRATEGIES FOR ACHIEVING GOALS

Psychology professor Dr. Gail Matthews has advice for those who put ‘stop procrastinating’ on their list of New Year’s resolutions. Share your goals with a friend.

Research recently conducted by Matthews shows that people who wrote down their goals, shared this information with a friend, and sent weekly updates to that friend were on average 33% more successful in accomplishing their stated goals than those who merely formulated goals.

Matthews became interested in the study of procrastination about 10 years ago after reading an article in *Fast Company* magazine about the “1953 Yale Study of Goals.” The premise of the study – that people who write down specific goals for their future are far more likely to be successful than those who have either unwritten goals or no specific goals at all – has inspired the teachings of many self-help authors and personal coaches.

The only trouble is that the study was never actually conducted. The 1996 *Fast Company* article debunked the Yale study as little more than an often-quoted urban legend.

However, Matthews’ research now backs up the conclusions long attributed to the mythical Yale study.

“With the proliferation of business and personal coaching and often anecdotal reports of coaching success, it is important that this growing profession be founded on sound scientific research,” Matthews said.





# WHY DO WE NEED GOALS?

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- BECAUSE THEY WORK!
- DO YOU REALLY NEED TO KNOW MORE?
- GOALS WILL DIRECT YOUR SUBCONSCIOUS MIND TO WORK TOGETHER WITH YOUR CONSCIOUS MIND TO RECEIVE A RESULT.
- CONCENTRATING ON GOALS CAUSES OTHER ITEMS TO NO LONGER DISTRACT US.
- IT FEELS GOOD TO BE ACHIEVING GOALS.
- GOALS HELP TO KEEP US STAY ACCOUNTABLE.
- AND MUCH MORE!





# S.M.A.R.T. GOALS



S = SPECIFIC

TARGET A SPECIFIC AREA FOR IMPROVEMENT

M = MEASURABLE

QUANTIFY OR AT LEAST SUGGEST AN INDICATOR OF PROGRESS

A = ASSIGNABLE

SPECIFY WHO WILL DO IT

R = REALISTIC

STATE WHAT RESULTS CAN REALISTICALLY BE ACHIEVED, GIVEN AVAILABLE RESOURCES

T = TIME-RELATED

SPECIFY WHEN THE RESULT(S) CAN BE ACHIEVED



# Write It Down and It Will Happen – Example

	GOALS	OBSTACLES	SOLUTIONS	ACTIONS TO TAKE
90 Day Goals - Professional	Obtain 5 great clients	Time dedicated to finding them	Research how to connect with great clients	Schedule 15 min/day to think about, write down, recruit great clients
	Earn \$15,000 take home	High overhead Need Additional Clients	Cut back unnecessary expenses	Make spreadsheet of all expenses to ID those that can change
	Have administration file system/copy in place	Dedicated time	Hire administrative assistants – either legal secretary, receptionist, paralegal	Ask around for good leads
90 Day Goals - Personal	Regular exercise plan back	Discipline Excuse making Time	Schedule it like a client or go to a class	
	Write 2 chapters of “Flying High”	Distractions Exhaustion	Meditation Dedicated Time Sleep Better	150 words/day today Schedule 15 minutes/day
3 Year Goals - Professional	Net \$120,000			
	Have/own office location	None		Achieved! One & half months from writing
	Be recognized as a “super lawyer” in TB – well known	3		
3 Year Goals - Personal	Publish my book	Finding an agent Finishing the book	LinkedIn with publishers Use Cornell connections Dedicate time per day	Spend 10 min/week or month w/LinkedIn to get connected Spend 15 min/day writing
	Have my first series of speaking engagements as a motivator	2		
	Be married with a child	3		



# Write It Down and It Will Happen – Page 1

	GOALS	OBSTACLES	SOLUTIONS	ACTIONS TO TAKE
90 Day Goals - Professional	1	1		
	2	2		
	3	3		
90 Day Goals - Personal	1	1		
	2	2		
	3	3		



# Write It Down and It Will Happen – Page 2

	GOALS	OBSTACLES	SOLUTIONS	ACTIONS TO TAKE
<b>3 Year Goals - Professional</b>	1	1		
	2	2		
	3	3		
<b>3 Year Goals - Personal</b>	1	1		
	2	2		
	3	3		



# Write It Down and It Will Happen – Page 3

<b>10 Year Goals - Professional</b>	1	1		
	2	2		
	3	3		
<b>10 Year Goals - Personal</b>	1	1		
	2	2		
	3	3		
<b>Lifetime Goals - Professional</b>	1	1		
	2	2		
	3	3		
<b>Lifetime Goals - Personal</b>	1	1		
	2	2		
	3	3		



# Write It Down and It Will Happen – Page 4

	GOALS	OBSTACLES	SOLUTIONS	ACTIONS TO TAKE
Lifetime Goals - Professional	1	1		
	2	2		
	3	3		
Lifetime Goals - Personal	1	1		
	2	2		
	3	3		



# Do What Ben Franklin Did



PLEASE,  
TURN OFF  
YOUR  
CELL PHONE

Ben Franklin carried a day book, was always working on improving himself, and found that writing things down and journaling had a significant impact on his life.

We have over 1,000 things that he never even thought possible, yet armed with intellect, good habits, and dedication to improving himself, his business, and his community he was able to achieve much more in each year of his life than most of us will achieve in a lifetime.

Try the daybook idea – we guarantee that you will like it!



# Your Daily Task List Procedure

The Daily Task List allows you to get everything you need to do out of your head, so you don't have to use mental energy remembering (and often forgetting) what you are trying to achieve.

Draft your Daily Task List first thing each morning or at the end of the day at an uninterrupted time.

It can be helpful to characterize items.

It is best to carry a clipboard list, a journal, or a notebook with you everywhere. When you think of another task, write it down immediately so that you can track it.

Handwrite versus typing. This makes your brain think about each item for two seconds. Ideas will result.

Review task lists for the office in a daily delegation (or being delegated to) meeting if you can.

## STEP ONE

- Find a few minutes of uninterrupted time to compose your daily task list each morning (or the night before).
- Physically write down everything on your to-do list for the next day.
- Do so in uninterrupted silence so that you are concentrating on what you write down and what your thoughts are during this process.
- Generally, write the most important things at the top and less important things at the bottom.
- Rank the items as “A” for very important, “B” for important and “C” for less important.
- Rank each item “A-1”, “A-2”, “A-3”, “B-1”, “B-2”, etc.





# Your Daily Task List Procedure

## STEP TWO

- To the right of each item that can be delegated write down who can handle it for you. To the right of each item that can be handled by a simple email put an “E” in a circle.
- To the right of each item that can be dictated in your car or while walking the dog put a “D” in a circle. (The dog doesn’t care and might have helpful comments.)
- To the right of any item that can be typed during otherwise inactive phone calls or conferences put an “T” in the circle.
- For an item that you can think through while standing in line for coffee (by the way why do you need coffee?) or otherwise put a “TL” next to it for “think about later”.
- Use other codes to determine how to handle these items – for example, if you can dictate this the next time you are in the car put a “C” in a circle next to it.
- If you want to lose weight, use a separate column to write down what you eat each day.
- Do the best you can for the day you are in without being distracted, anguished, or overly attentive to future events that are not relevant today, or past events that do not help you and might even hurt.

This all worked very well for Benjamin Franklin and many before him!



Now go forth and conquer the day!



# Prioritize, Delegate and Calendar

## Prioritization

What determines an item's priority?

- It is ultimately a personal choice and depends upon the urgency of the task (does it need to be done immediately?).
- Question your decision to do simple and fast items in lieu of something more difficult and important – is this your “inner child” just being lazy or being tired with the need to be reactive?
- Don't forget the 80/20 Rule. 80% of revenue will come from 20% of matters. Identify those matters that are most important or that make the best impression and do those first and make sure they are always at a high priority.
- Small items can be grouped together, and sometimes it can be helpful to take 20 minutes in the morning and get 10 2-minute emails out of the way.

It works faster to proofread or complete something that you worked on more recently – if you started a letter to a client yesterday and had your choice between finishing that letter or working on something that you started a week ago, which is more efficient? You can impress the client you met with yesterday by completing the letter and getting it out the door. The client you met with last week is not going to be impressed anyway.

After you have prioritized your task list, you will find that it is impossible for you to complete every item on your own. Delegate what you can.



# Prioritize, Delegate and Calendar

## Delegation

- Look at your prioritized task list. Mark items that can be taken care of by other people.
- To the right of each item that can be delegated, write down who can handle it for you.
- Review the task list at the end of the day to note whether this item has been completed or is still being worked on by the person you delegated it to.

**What do you do with projects that cannot be completed by the end of the day? How do you make sure that nothing slips between the cracks?**



- For any items that you know will not be completed by day's end, create a follow-up list and put these items on it.
- If possible put a completion date or a check-in date for the item.

We use PCLaw software to calendar reminders for clients. Maybe we are going to ask them about updating their planning documents in three months, and we do not want to miss out on the opportunity to do more work for them.

For items with a shorter time frame review, review your task list and your follow-up list daily to make sure items are being completed by their deadlines.



# Prioritize, Delegate and **Calendar**

## Calendar

Writing down the items that you will not get to today can be extremely therapeutic and useful – perhaps simply write them onto the list for tomorrow – towards the bottom.

Win the battle against impulsiveness and “other peoples failure to plan becoming your problem.”

Write those things down in the “add to my list later” column when they come up, and decide immediately whether they really merit an interruption or whether you are simply being impulsive.



Fr25

We recommend the Franklin Covey Daily Planner  
www.franklinplanner.com

July 2014							August 2014						
S	M	T	W	T	F	S	S	M	T	W	T	F	S
		1	2	3	4	5	31					1	2
6	7	8	9	10	11	12	3	4	5	6	7	8	9
13	14	15	16	17	18	19	10	11	12	13	14	15	16
20	21	22	23	24	25	26	17	18	19	20	21	22	23
27	28	29	30	31			24	25	26	27	28	29	30



## Appointment Schedule

- ✓ Completed
- Forwarded
- X Deleted
- ⊗ Delegated
- In Progress

## ↓ ABC Prioritized Daily Task List

- |      |                                 |                                      |
|------|---------------------------------|--------------------------------------|
| ✓ A  | Bidir pain med for [redacted]   | 6                                    |
| ✓ B  | EP Flip calls                   | 7                                    |
| • C  | Game Six Changes                | 8                                    |
| • A+ | August 3 program                | 9                                    |
| • B  | SEA announcement                | 10                                   |
| • B  | Software Announcement           | 10:30 Go to webinar call on software |
| • B  | 704 Announcement                | 11                                   |
| ✓ A  | Entitlement webinar             | 12                                   |
| → C  | Videos on website               | 1                                    |
| → C  | Remove old software ones        | 2                                    |
| • D  | E versions on Amazon            | 3                                    |
| • D  | E versions on SmartWords        | 4                                    |
| → C  | HPC Accounting                  | 5                                    |
| ✓ B  | Flip w/ [redacted] on Same Sex  | 6                                    |
| ✓ C  | Free Seminar items              | 7                                    |
| • D  | Programmer course for me        | 8                                    |
| • D  | [redacted] Kit                  | 9                                    |
| ✓ B  | BE Claim webinar                | 10                                   |
| ✓ A+ | Trans Rpt. Sat. Replay          | 11                                   |
| • D  | Monthly webinars                |                                      |
| • B  | @HealthLaw @CF                  |                                      |
| • B  | Florida Book Changes            |                                      |
| → A+ | Flip w/ [redacted]              |                                      |
| • B  | 8th Reminder to call [redacted] |                                      |
| • B  | Li. Seminar 2015                |                                      |
| → D  | Course of all books             |                                      |
| • B  | Opt-in Campaign                 |                                      |
| • B  | Item learned & exercise         |                                      |
| • D  | No underline version E version  |                                      |
| ✓ A  | Flip w/ [redacted] Li. Q&A      |                                      |
| → D  | Inventory tips in comp          |                                      |

• R: Required, H: Home, U: Urgent, F: Follow-up, C: Consultation, P: Personal



Friday, July 25, 2014

Daily Notes

20th Day 159 left Week 10

Last 20 Blog Entries for ASG, weekend

Bloomberg from England.

Email on what to cover in Isle of Man.

FICPA outline

Mark does on iPad w/ instruction sheet.

Vaio mark up instructions

Shurs Opt.



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# Franklin Covey

The FranklinCovey one-day time management course is required for all of our lawyers and most of our paralegal personnel.

Their system and physical notebook are excellent.

## Quotes by Dr. Stephen R. Covey:

“The main thing is to keep the main thing the main thing.”

“The key is not to prioritize what’s on your schedule, but to schedule your priorities.”

“Remember, to learn and not to do is really not to learn. To know and not to do is really not to know.”

Go here to learn more about FranklinCovey: <http://www.franklincovey.com/>



## Sample To Do List

[illegible]



# Time Wasters



*What are your 3 biggest time wasters?*

**Examples include:**

- A client that does not pay.
- Time wasted because of disorganization.
- Risk of getting sued or distracted.
- Time wasted because of others in the organization.
- Idle chatter when I should be working.
- Going to lunch when there is no solid business or financial result.
- Time with people who are trying to sell things to you.



# Time Wasters



## Identify your time wasters and stop them:

1. If interruptions waste your time, then go to a separate room with the work that needs concentrated efforts, or close your door, unplug your phone, and turn off your cell phone.

Your mind works much better when it knows that it will not be interrupted, or permitted to divert you.

2. Prevent employees from wasting your time (make them solve their own problems using the Strategy Circle or other regimen).
3. Prevent clients from wasting your time.

## Before a meeting:

1. Do you have everything you need?
2. Have the secretary ask the client if there is anything that they want copied that they brought with them to share.
3. Ask a secretary to ask the client if there is anything else that the client will need.
4. If the client owes an invoice or has not signed a fee agreement, the secretary can ask them whether they would like to get that handled.
5. The client can tell the secretary if there are names misspelled on documents or other clerical things that might be handled before or while you are meeting with them.



# What Are Your 3 Biggest Time Wasters?

Item	Why does this waste your time?	How to prevent future waste.
1. Social Media	<ul style="list-style-type: none"> <li>- Because you can spend hours scrolling</li> <li>- It diminishes your critical thinking skills</li> </ul>	limit screen time
2. Binge watching TV series or movies	Because you are taking hours away from something that could be spent doing something productive	limit yourself to one episode or one movie a day.
3. Spending too much time worrying about non-beneficial relationships.	you become too invested in someone that can drag you down	Find someone with similar goals & set boundaries



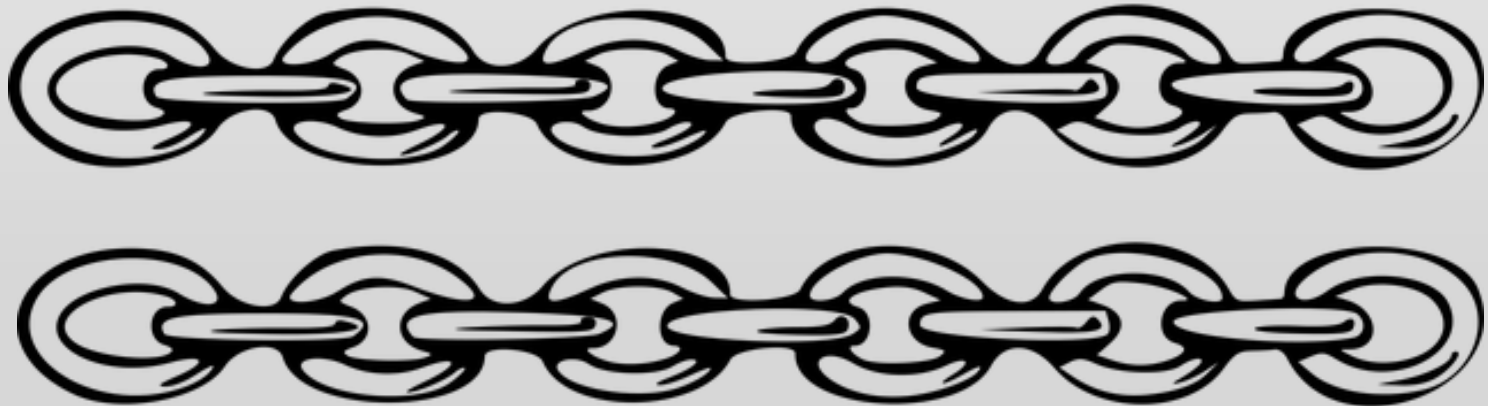
# What Are Your 3 Biggest Time Wasters?

Item	Why does this waste your time?	How to prevent future waste.
1.		
2.		
3.		



“CHAINS OF HABIT ARE TOO LIGHT  
TO  
BE FELT UNTIL THEY ARE TOO HEAVY  
TO BE BROKEN.”

- Warren Buffett





# 7 HABITS OF HIGHLY EFFECTIVE PROFESSIONALS

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1. PROFESSIONAL GOALS FOR PERSONAL IMPROVEMENT.
2. PROFESSIONAL GOALS FOR IMPROVING THE OFFICE TEAM AND SYSTEMS.
3. EMPHASIS ON SPECIAL TALENTS AND ABILITIES.
4. WORKING TO ENHANCE THE ENJOYMENT OF PROFESSIONAL FUNCTIONS.
5. WORKING TO ENHANCE THE WELFARE OF CLIENTS AND WHAT CAN BE DONE FOR THEM.
6. WORKING TO ELIMINATE LESS IMPORTANT OR DESIRED FUNCTIONS AND ACTIVITIES.
7. LIVING A BALANCED LIFE.



# HABITS - EXAMPLES

## Daily Behavior

- Always wake up at the same time each day.
- Always exercise first thing in the morning.
- Weigh yourself daily and write down the weight to make yourself accountable.
- Always write down three positive things.
- Always review your to-do list and update it.
- Eat a healthy breakfast.
- Drink two glasses of water.
- Get to the office by 7:30 a.m.
- Proofread anything that didn't go out the day before.
- Meet with \_\_\_\_\_.
- Return emails from previous day.
- Return phone calls from previous day.
- Smile
- Make eye contact.
- Joke.
- Compliment.
- Accentuate positives.
- Always learning.
- Always improving techniques.
- Always doing more than what is expected.
- Always finishing projects on time or early.
- Never promising more than I can deliver, or apologize and explain promptly.
- Closely proofreading work or explaining that it has not yet been closely proofread.
- Affirming how fortunate I am.



# HABITS - EXAMPLES

## ▪ Eating

- The food I bring home.
  - No unhealthy carbs.
  - No manufactured foods.
  - Plenty of vegetables and fruit.
- Smaller portions.
- Only eat vegetables in front of the TV.
- Only eat carbs to the extent of calories burned exercising during the day.
- Measure and reduce alcohol intake.
- Alcohol only on weekends and at social events.
- Bring almond milk to the office – 30 calories per 8 ounce serving.
- Bring blueberries to office to put in almond milk.

## ▪ Eating (Cont'd)

- Have restaurant send sliced vegetables instead of lettuce in salads with lean meats for microwaving.
- Reduce caffeine intake to \_\_\_\_\_.
- Stop putting sugar or artificial sweetener into coffee.
- Drink only light beer and club soda every other drink when partying.
- Other
  - Sort vitamins, mineral oils, and medications weekly into pill boxes so that you know you are taking them daily. (Buy 4 and load up 28 days at a time.)
  - Meditate.





# HABITS - EXAMPLES

- **Exercise**

## Daily

- Stretch.
- Sit-ups-abs.
- Push-ups.
- Straps.
- Hamstrings.
- Exercise straps.
- Dumb bells.
- Treadmill with table.
- Exercise Bike
- Write down 3 things to be grateful for and 3 positive achievements each morning and/or the evening before.

- **Aerobics**

- Read on exercise bike.
- Read on treadmill.
- Run.
- Outdoor biking.

- **Working with a trainer**

- Yoga, or in a group.
- Pilates, or in a group
- Weightlifting – fitness, or in a group.
- Spinning.



# BUSINESS RELATIONSHIP HABITS

HABITS TO CHANGE	FIRST ALTERATIONS	GOAL	NEXT ACTION



# WORK DAY HABITS

HABITS TO CHANGE	FIRST ALTERATIONS	GOAL	NEXT ACTION
			43



# LEISURE TIME HABITS

HABITS TO CHANGE	FIRST ALTERATIONS	GOAL	NEXT ACTION



# DIET HABITS

HABITS TO CHANGE	FIRST ALTERATIONS	GOAL	NEXT ACTION



# EXERCISE HABITS

HABITS TO CHANGE	FIRST ALTERATIONS	GOAL	NEXT ACTION



# OTHER HABITS

HABITS TO CHANGE	FIRST ALTERATIONS	GOAL	NEXT ACTION



# YOU CAN'T HAVE SUCCESS WITHOUT BALANCE

Limitations on any of the balloons will hold back the other balloons. Where are you most limited?

The diagram consists of five hot air balloons, each with a rainbow-colored envelope and a brown wicker basket. They are connected by a blue line that forms a series of loops between them. Each balloon has a label on its envelope:

- Personal Life
- The Professional Lawyer/Entrepreneur
- Clientele/Customers
- The Team
- Structures, Processes, and Knowledge Base

Below each balloon is a box for reflection:

POSITIVE ITEMS

POSITIVE ITEMS

POSITIVE ITEMS

POSITIVE ITEMS

POSITIVE ITEMS

NEXT STEPS

NEXT STEPS

NEXT STEPS

NEXT STEPS

NEXT STEPS

NO BALLOON CAN RISE ABOVE THE LEVEL OF THE OTHERS.



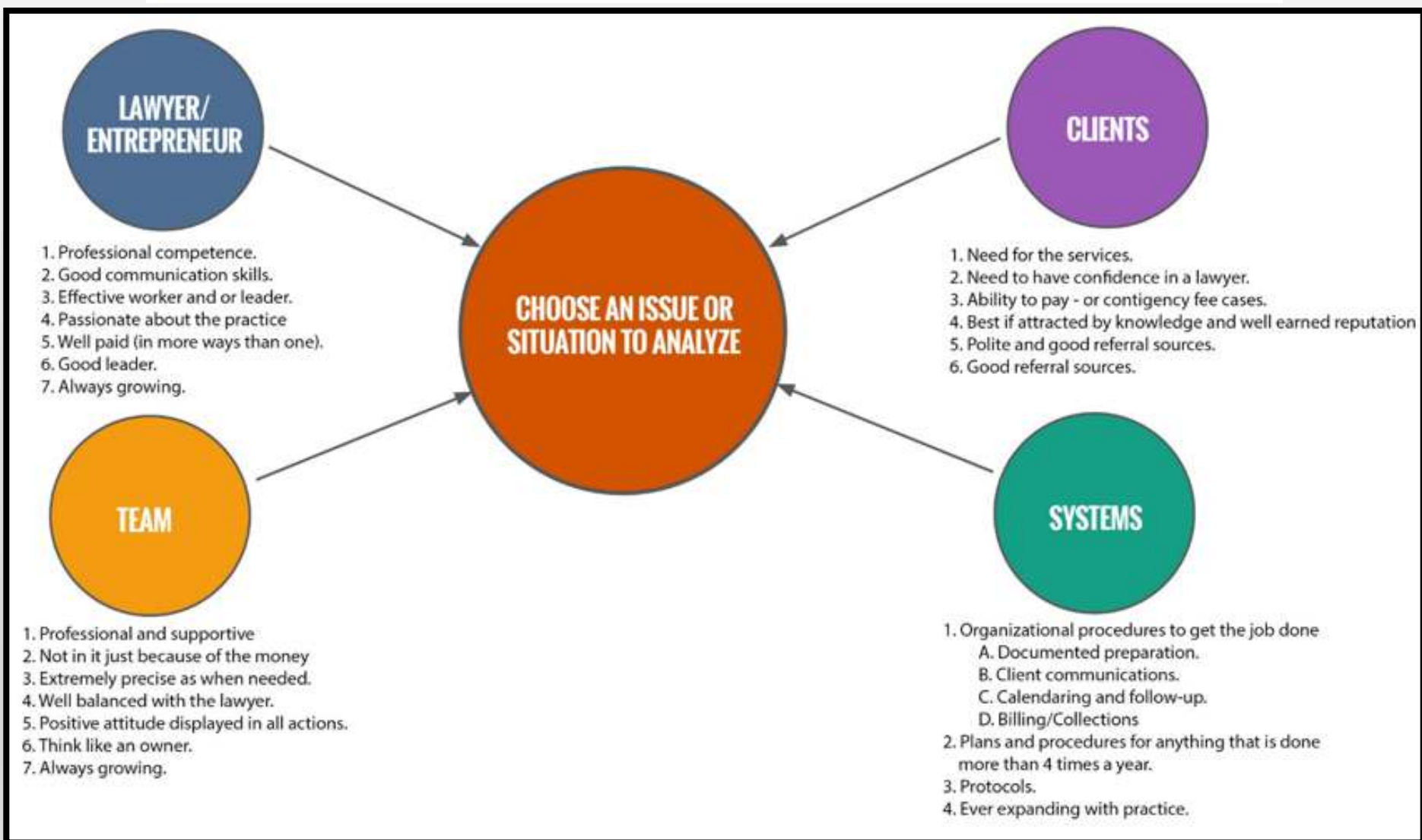


# INTERACTING QUADRANTS OF A SUCCESSFUL PRACTICE

<b>LAWYER/ENTREPRENEUR:</b> <ol style="list-style-type: none"> <li>1. Professional competence.</li> <li>2. Good communication skills.</li> <li>3. Effective worker and/or leader.</li> <li>4. Passionate about the practice.</li> <li>5. Well paid (in more ways than one).</li> <li>6. Good leader.</li> <li>7. Always growing.</li> </ol>	<b>CLIENTS:</b> <ol style="list-style-type: none"> <li>1. Need for the services.</li> <li>2. Need to have confidence in a lawyer.</li> <li>3. Ability to pay – or contingency fee cases.</li> <li>4. Best if attracted by knowledge and well earned reputation.</li> <li>5. Polite and cooperative.</li> <li>6. Good referral sources.</li> </ol>
<b>TEAM:</b> <ol style="list-style-type: none"> <li>1. Professional and Supportive.</li> <li>2. Not in it just because of the money.</li> <li>3. Extremely precise as and when needed.</li> <li>4. Well balanced with the lawyer.</li> <li>5. Positive attitude displayed in all actions.</li> <li>6. Think like an owner.</li> <li>7. Always growing.</li> </ol>	<b>SYSTEMS:</b> <ol style="list-style-type: none"> <li>1. Organizational procedures to get the job done.               <ol style="list-style-type: none"> <li>a. Document preparation.</li> <li>b. Client communications.</li> <li>c. Calendaring and follow-up.</li> <li>d. Billing/Collections</li> </ol> </li> <li>2. Plans and procedures for anything that is done more than 4 times a year.</li> <li>3. Protocols.</li> <li>4. Ever expanding with practice.</li> </ol>
<b>PERSONAL LIFE:</b> <ol style="list-style-type: none"> <li>1.</li> <li>2.</li> <li>3.</li> <li>4.</li> <li>5.</li> </ol>	



# INTERACTING QUADRANTS OF A SUCCESSFUL LAW PRACTICE



## ESTATEVIEW SOFTWARE'S GOAL ACHIEVEMENT/ROAD BLOCK ELIMINATOR

Problem	Causes Resulting From My Actions	Possible Solutions and Actions	A Possible Positive Impact of Solution (Rated 1-10)	B Ease in Implementation of Solution (Rated 1-10)	A x B Priority Multiplier (Absolute Necessity = 100)
	1.	1.			
	2.	2.			
	3.	3.			
	4.	4.			
	5.	5.			
<b>Ideal Solution</b>	<b>Causes Resulting from Actions of Others</b>	<b>Possible Solutions and Actions.</b>			
	1.	1.			
	2.	2.			
	3.	3.			
	4.	4.			
	5.	5.			
<b>Awesome Consequences of Solving the Problem</b>	<b>Causes Resulting from My Perception and the Perception of Others</b>	<b>Possible Solutions and Actions.</b>			
	1.	1.			
	2.	2.			
	3.	3.			
	4.	4.			
	5.	5.			



## ESTATEVIEW SOFTWARE'S GOAL ACHIEVEMENT/ROAD BLOCK ELIMINATOR

Problem	Causes Resulting From My Actions	Possible Solutions and Actions	A Possible Positive Impact of Solution (Rated 1-10)	B Ease in Implementation of Solution (Rated 1-10)	A x B Priority Multiplier (Absolute Necessity = 100)
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	4.	4.			
	5.	5.			
<b>Ideal Solution</b>	<b>Causes Resulting from Actions of Others</b>	<b>Possible Solutions and Actions.</b>			
	1.	1.			
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	3.	3.			
	4.	4.			
	5.	5.			
<b>Awesome Consequences of Solving the Problem</b>	<b>Causes Resulting from My Perception and the Perception of Others</b>	<b>Possible Solutions and Actions.</b>			
	1.	1.			
	2.	2.			
	3.	3.			
	4.	4.			
	5.	5.			



# THE PARETO PRINCIPLE (80/20)

INVENTED BY VILIFREDO PARETO IN 1896

How do I get more of this?	The best 20% of your clients or matters.	80% of your revenue?	<ol style="list-style-type: none"><li>1. 80% of your revenue comes from 20% of your clients.</li><li>2. 80% of your clients come from 20% of your referral sources.</li><li>3. 80% of your write-offs come from 20% of your clients.</li><li>4. 20% of your projects bring in 80% of your revenues.</li><li>5. 20% of wasted time causes 80% of the opportunities you miss.</li></ol>
		Ideas and Actions:	
How do I get Fewer of these?	The worst 20% of your clients or matters.	5% of your revenue?	With a good team and appropriate systems, you can get the best 20% handled, and you do not have to wait to finish the next 80% before going to the next lucrative project.
		80% of your problems.	
			Delegate and verify.
			Develop your delegation structures, habits, and



# THE PARETO PRINCIPLE (80/20)

INVENTED BY VILIFREDO PARETO IN 1896

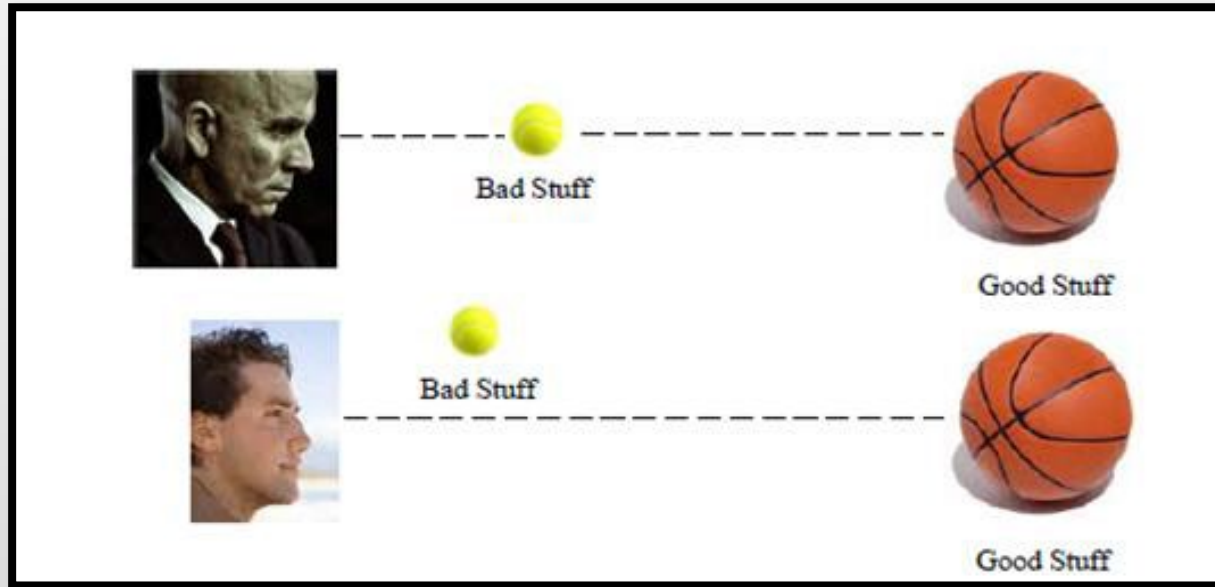
How do I get more of this?	The best 20% of your referral sources.	80% of your revenue? Ideas and Actions:	<b>Notes for Improvement:</b> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	
How do I get Fewer of these?	The worst 20% of your referral sources.	5% of your revenue?  80% of your problems.		<hr/> <hr/> <hr/>





# THE 90/10 RULE HOW TO BE SUCCESSFUL DOING WHAT YOU LOVE, AND LOVING WHAT YOU DO

By Alan S. Gassman and Kristen Sweeney



Imagine holding a basketball out as far as you can from your face with one hand, and a tennis ball out as far as you can from your face with the other. The basketball represents what is good in life, including health, love, prosperity, and ability. The tennis ball represents what is not so great in life. They are in the right perspective, with the good things in life far outweighing the bad. Now move the arm with the tennis ball closer to your face, so the tennis ball blocks the view of the basketball. Now the much smaller tennis ball blocks the view of the basketball almost entirely- the bad things in life seem to be far outweighing the good. This article will help you remember to put that tennis ball back into perspective where it belongs, so you can see and appreciate all the goodness in your life.



# THE 90/10 RULE -- HOW TO BE SUCCESSFUL DOING WHAT YOU LOVE, AND LOVING WHAT YOU DO

By Alan S. Gassman and Kristen Sweeney

I had a meeting recently with a 75 year old physician who is still practicing medicine with significant success, energy and enthusiasm. The doctor came jumping out to the lobby with a sprightly greeting, “How you doing? It’s great to meet you!” His beautiful wife of over 50 years was there with him. We were there to discuss estate planning, but first he insisted on giving me a tour of his office. He spent 30 minutes with me, going into every room and showing me every piece of art and every piece of equipment in his practice. This man was the chief of staff at one of our local hospitals when I was in school - I am 51, he is 75. He said “Alan, a lot of doctors don’t know how good we have it. 90% of my life is fantastic. I am telling the employees what to do, I am helping patients, I am saving their vision, I am important, I have plenty to eat, I have plenty to drink, I have a lovely wife - 90% of life is great. And then 10% of the time there are problems. And so many people take that 10% and put it in front of the 90%. Young doctors come in and say ‘they denied my claim for XYZ’ and I say ‘Who cares, when they paid the other 97 claims!’ So maybe we aren’t making quite as much now as we used to, maybe this is not the ‘golden age’. Instead of focusing on that, we should all be talking about how great 90% of our life is every single day.” So before you decide things are so bad you have to sell your practice, or make any other rash decisions, think about that doctor, that 75 year old physician, who is one of the happiest people I know.

That conversation has had a great influence on me and many people that I have shared this story with. It is an excellent reminder that we could all benefit from a little perspective in life- putting the tennis ball back where it belongs. There is no doubt that physicians face hurdles in life. Getting accepted to medical school is only the beginning of a long and difficult road.

## MAKING THE BASKETBALL BIGGER

It is vital that whenever you hit a bump in the road, you keep things in perspective, remember why you became a physician in the first place, and hang onto that as the anchor in your daily thoughts. Life never stops challenging us, but remembering why we are here can keep us far more satisfied. Do you love being an obstetrician because you help bring children into this world? An ophthalmologist because you help people regain their sight? An orthopedic surgeon because you help people walk again?





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## MAKING THE TENNIS BALL SMALLER - CUTTING YOUR WORRIES IN HALF

Principles from *How to Stop Worrying and Start Living*

The following are “Fundamental Principles for Overcoming Worry” from the incredible book *How to Stop Worrying and Start Living* by Dale Carnegie from 1948!

1. Live in “day-tight compartments.”
2. How to face trouble:
  - a. Ask yourself, “What is the worst that can possibly happen?”
  - b. Prepare to accept the worst.
  - c. Try to improve on the worst.
3. Remind yourself of the exorbitant price you can pay for worry in terms of your health.

### Basic Techniques in Analyzing Worry

1. Get all the facts.
2. Weigh all the facts - then come to a decision.
3. Once a decision is reached, act!
4. Write out and answer the following questions:
  - a. What is the problem?
  - b. What are the causes of the problem?
  - c. What are the possible solutions?
  - d. What is the best possible solution?



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## Break the Worry Habit Before it Breaks You

1. Keep busy.
2. Don't fuss about trifles.
3. Use the law of averages to outlaw your worries.
4. Cooperate with the inevitable.
5. Decide how much anxiety a thing may be worth and refuse to give it more.
6. Don't worry about the past.

## Cultivate a Mental Attitude that will Bring You Peace and Happiness

1. Fill your mind with thoughts of peace, courage, health and hope.
2. Never try to get even with your enemies.
3. Expect ingratitude.
4. Count your blessings - not your troubles.
5. Do not imitate others.
6. Try to profit from your losses.
7. Create happiness for others.

Another way of saying all this is to repeat the old adage "You can't see the forest for the trees," meaning to not focus so much on just the details (particularly the negative ones), but instead see the big picture that is your life, and appreciate that the entire forest is infinitely more beautiful than any single tree. It is also important to remember the words, "Why do you see the speck in your brother's eye but fail to notice the beam in your own eye?" Focus on yourself first, appreciate what is great and work on what is not so great, and you will be on the path to success.



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*"Success is not the key to happiness. Happiness is the key to success. If you love what you are doing, you will be successful."*  
- Herman Cain

## DEVELOPING YOUR UNIQUE ABILITIES

*Shtick - (Yiddish origin, slang) A characteristic attribute, talent, or trait that is helpful in securing recognition or attention.*

What is a shtick? How can you come up with a shtick of your own? And how can having and using a shtick help bring about success and happiness to your medical practice and your life?

*"You gotta getta gimmick if you wanna get ahead."*  
-Gypsy

Many of the artists, businessmen, and companies that have a lasting impact or prolonged success stick with us because they have something distinctive, something unique that differentiates them from the rest of the crowd. You can tell if someone has shtick because it is usually easy to describe them in a few words or phrases - it almost seems that they own certain qualities, because they are so inextricably linked in our minds to a particular individual.

For our first example, we are going to look at a quintessential example of shtick in the entertainment industry: the great Charlie Chaplin. Practically anyone who has ever seen a photo of Chaplin can easily identify him by what became his "uniform": "baggy pants, big shoes, a cane and a derby hat.....a small moustache." "I wanted everything to be a contradiction," Chaplin said in his autobiography, "the moment I was dressed, the clothes and makeup made me feel the person [my character] was."

What came to Chaplin as inspiration for one particular character gave life to his on-screen persona; from this film forward, the clownish get-up became his signature, and was forever linked to his style of comedy, largely of the slapstick and mime variety. Chaplin was undoubtedly brilliant, but so were many other performers. Playing the clown, and dressing the part, was his shtick, and it made him stand out so much that he created his own genre; comedic bits of clownishness are now referred to as "Chaplin-esque".



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Our second example is a fast-food chain originally founded in 1948. While it has not yet expanded to Florida, In-N-Out Burger has enjoyed fantastic success on the West Coast. The shtick of In-N-Out Burger is based on a theory of simplicity: a simple menu and decor that are a throwback to burger joints of the 1950s.

The menu at In-N-Out Burger is focused on doing a few things simply and extremely well. The restaurant sells hamburgers, with the only variations being a cheeseburger and a “double ” (double meat, double cheese). They serve hand-cut fries, sodas and milkshakes. Everything is cooked fresh, the meals are simple, and the limited menu allows the food prices to be extremely inexpensive compared to other fast-food chains. The employees wear old-fashioned aprons held together with giant safety pins and paper hats, adding to the old-time feel. The simplicity of the food and atmosphere is the shtick; the shtick is designed to keep prices down, so the company is successful and customers are happy.

In-N-Out also employs a second shtick, the “secret menu”. The secret menu is visible online but does not appear anywhere in stores, and allows for such modifications as ordering French fries “well done” to have them cooked extra crispy, or to have a burger served “animal style”, which means added mustard, onions, pickles and special sauce. The lure of the secret menu is that you only hear about it by word of mouth, so those who have heard of it feel “in-the-know”, and making customers feel special is an excellent way to keep them coming back.

The third example of shtick we are going to discuss is actually a widespread movement: the “going green” movement. As we are becoming more ecologically aware and more concerned about our future on this planet, the effort to “go green” has become extremely popular. Large corporations are implementing solar panels or other energy-efficient technologies into their newest buildings, or providing employees with stainless steel reusable bottles instead of disposable plastic water bottles. Some business are trying to move toward a paperless environment or are implementing in-office recycling.



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Clothing retailers and food purveyors are placing emphasis on sustainability, which means being able to make products for consumption while maintaining stasis in the environment. Unlike the In-N-Out Burger example, which utilizes its shtick to keep prices low, the green/sustainability movement appeals to the moral and ethical sides of consumers. Prices are typically higher for sustainable products, but the idea is that the customer is willing to make this kind of an investment because “it’s the right thing to do.” It should be noted that the sustainability market is still tenuous as a nationwide shtick, experiencing much greater success in some regions than others.

*"Everybody's a self-made man; but only the successful ones are ever willing to admit it."*

- Anonymous

So now that we understand what a shtick is, the next step is finding your own shtick, and using it to bring you happiness and success.

Although a shtick may imply a certain degree of falseness, of putting on a persona or a character, or embracing a marketing ploy, the best shticks are meaningful at heart to the individuals who employ them.

One of my favorite advisors who passed away recently had hundreds and hundreds of physician clients, just as I do. He always used to say: “You need a shtick. Every doctor who does better than most of the others has a shtick. Whatever it is - a marketing idea, a platform, or a thing you do for patients that no one else does that causes them to refer, or just something else going on. If you can look for it and find it, find something you love to do that really pays a little better than everyone else, you can increase the profitability and enjoyability of your practice.”

This advisor was exactly right. Find out, figure out what is important to you - what you value, your patients (customers) will value, and then find a way to provide that service, perk or product.

Some of your colleagues are employing these techniques already. An excellent example is the proliferation of “dental spas”, which cater to people who are afraid of the dentist by providing a calming environment and relaxing ancillary services while patients are having dental work done. The extra perks keep patients returning because the dental spa stands out among the other practitioners.



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Another growing niche market is the concierge doctor, which has gained such popularity that it is even the theme of a popular television show, “Royal Pains”. It is thought by some that the concierge market will pick up as healthcare plans pay for less and less. I have quite a few clients who pay \$1,400 a year to a primary care doctor for a 24/7 cell phone, “visit whenever they want” relationship. They do not care if insurance pays for it, they just want someone to call when it hurts.

This system is effective for my clients because the doctor I have used will meet the client the day after we call and immediately write a letter to the healthcare plan medical director, if necessary, saying “I am the new doctor, you don’t cover X, Y and Z and I consider that negligence. I want my patient to have these medications and that test, and I am available by phone 24/7. Give me a call.” That is worth \$1,400 right there.

So what motivates you, what sparks you that you can add to your practice as that extra something special that you offer? Can you offer early morning and weekend appointments? Do you provide personalized reminders when a patient is due for a check-up? Children’s practices may offer a plethora of options, from themed offices to goody bags. Maybe you can offer small prizes for patients who bring in a coupon code found on your website. Maybe your office staff sings. On the luxury end, maybe you provide an extremely private reception area or plush furnishings and a fantastic magazine selection. Do not break the bank investing in perks you cannot afford, but do try to budget in marketing/development funds for the growth of your shtick. There are endless opportunities, and the more creative the better.

*"Success: willing to do what the average person is not willing to do."*

*- Anonymous*

Once you have brainstormed about your shtick, come up with an action plan for its implementation. Try it! You and others will like it! Do not be afraid to seek advice outside the realm of the medical world- you are integrating a marketing strategy, and there are experts in this field. If necessary, team up with a trusted advisor in this realm who can offer wisdom and most importantly, will keep the momentum going for integration of your shtick into the daily office routine. It will take effort, it will take time, but that time and effort, and the corresponding results, are exactly how you will set yourself and your practice apart.



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If you find a shtick that makes you happy and fulfilled, make it a part of your professional practice. Then success will come, and all that will be left to do is use your newfound perspective to enjoy the happiness and success you have achieved. That basketball will seem bigger than you could have ever imagined.

*"To laugh often and much;  
To win the respect of intelligent people and the affection of children;  
To earn the approbation of honest critics and endure the betrayal of false friends;  
To appreciate beauty;  
To find the best in others;  
To give of one's self;  
To leave the world a bit better, whether by a healthy child, a garden patch, or a redeemed social condition;  
To have played and laughed with enthusiasm and sung with exultation;  
To know even one life has breathed easier because you have lived ?  
This is to have succeeded."*

- Ralph Waldo Emerson

*"The person who gets the farthest is generally the one who is willing to do and dare. The sure-thing boat never gets far from shore."*  
- Dale Carnegie

*"The great successful men of the world have used their imagination: they think ahead and create their mental picture in all its details, filling in here, adding a little there, altering this a bit and that a bit, but steadily building - steadily building."*  
- Robert Collier

*"The toughest thing about success is that you've got to keep on being a success. Talent is only a starting point in business. You've got to keep working that talent."*  
- Irving Berlin

*"Success in business implies optimism, mutual confidence, and fair play. A business man must hold a high opinion of the worth of what he has to sell and he must feel that he is a useful public servant."* - R.H. Cabell

*"The man who will use his skill and constructive imagination to see how much he can give for a dollar, instead of how little he can give for a dollar, is bound to succeed."*  
- Henry Ford

*"No one can possibly achieve any real and lasting success or "get rich" in business by being a conformist."*  
- J. Paul Getty



# Client Retention and Success

*Your best advertising is a happy client or a referral source who is integrally involved with your representation of a happy client.*

What are you doing to display your “referability” and excellence to this captive audience?

## Good Habits For Gaining Referrals:

See Dan Sullivan’s “Referability Habits”, which are summarized below:

- Show up on time. (Remember the Woody Allen quote – “90% of success is showing up.”)
- Follow through on your promises.
- Remember your manners, say please and thank you (and be friendly to everyone while also being professional).

## For Lawyers:

- Show effort.
- Be thorough (or make sure that your team is thorough).
- Do a great job for the client.
- Prepare in advance, but do not over prepare.
- Let the client know what you are doing and when you do it.
- Coordinate billing with effort and results.





WHAT ARE YOU DOING TO DISPLAY YOUR “REFERABILITY” AND EXCELLENCE TO CAPTIVE AUDIENCES?

ITEM	HOW DOES THIS PROMOTE YOU?	NEXT ACTION
1.		
2.		
3.		



### 3 EXAMPLES OF REFERRAL SOURCES THAT HAVE GIVEN YOU GOOD YIELDS

REFERRAL SOURCE	CLIENTS RECEIVED	HOW TO THANK THE REFERRAL SOURCE	HOW TO YIELD MORE REFERRALS
1.			
2.			
3.			



# WHAT ARE YOU DOING TO HELP YOUR REFERRAL SOURCES?

ITEM TO ASSIST WITH	HOW I CAN ASSIST	WHO CAN HELP ME?	FIRST STEPS
CONTROL			
FREEDOM FROM ANXIETY			
INTERESTING PROCESS			
STIMULATION OR CALMNESS			
KNOW THAT THEY ARE IN GOOD HANDS.			
STAY IN THE FLOW.			
KNOW WHERE THEY ARE IN THE PROCESS.			
KNOW WHEN IT IS FINISHED.			



# WHAT YOUR CLIENT/REFERRAL SOURCE SEES VS. BACK ROOM ACTIVITY

WHAT YOUR REFERRAL SOURCE SEES	
<p>Examples:</p> <ul style="list-style-type: none"> <li>• Website</li> <li>• Seminars/Webinars</li> <li>• Books Published</li> <li>• Articles Written</li> </ul>	
WHAT THE CLIENT SEES	
<p>Examples:</p> <ul style="list-style-type: none"> <li>• Friendly Receptionist.</li> <li>• Welcoming Office.</li> <li>• Nuts on the Table.</li> <li>• Research was Conducted.</li> <li>• Materials prepared.</li> </ul>	
BACK ROOM ACTIVITY	
<p>Examples:</p> <ul style="list-style-type: none"> <li>• Gathering and compiling client information.</li> <li>• Preparing conference room for client meetings.</li> </ul>	



## HIRING CRITERIA: Which Of The Following Are Proper Initial Hiring Criteria?

Did they show up on time?

Were the forms completed properly?

What were they doing while completing the forms? (Ex: Talking on the phone.)

How was their performance on typing, grammar and sorting tests (if job related).

How did they answer interview questions.

Nepotism.



If the applicant passes the above, then they get an interview.

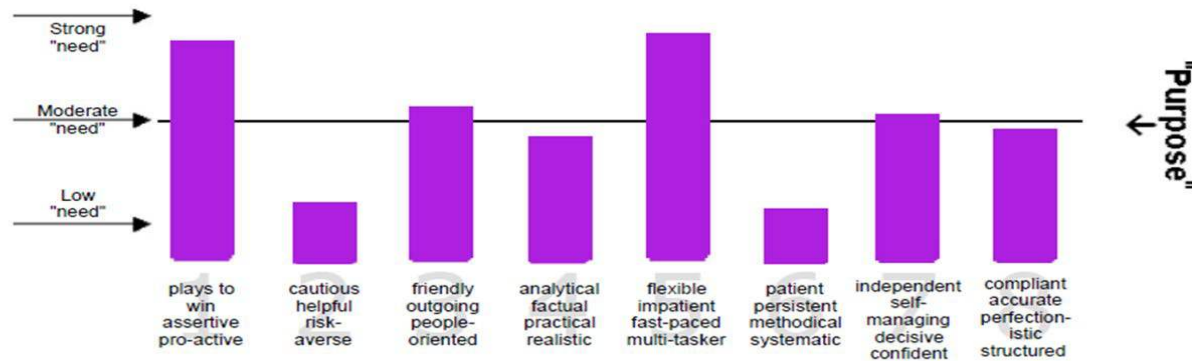


## The Omnia® Profile Compatibility Rating

Subject's Name [REDACTED]	Profile Number [REDACTED]	Date Submitted <b>08-25-2005</b>	Client Number [REDACTED]
Title <b>(C) Legal Secretary</b> [REDACTED]	Analyst <b>KLM</b>	QC by <b>JK</b>	<b>OCR®</b> <b>6</b>

<b>OECR®</b> <small>Omnia® Environmental Compatibility Rating</small> <div style="border: 1px solid black; border-radius: 10px; width: 40px; margin: 0 auto; text-align: center; padding: 5px;"><b>6.2</b></div>	<b>OVCR®</b> <small>Omnia® Vocational Compatibility Rating</small> <div style="border: 1px solid black; border-radius: 10px; width: 40px; margin: 0 auto; text-align: center; padding: 5px;"><b>5.8</b></div>	<b>Responsivity</b> <small>Vitality, stamina, alertness, endurance</small> <div style="border: 1px solid black; border-radius: 10px; width: 40px; margin: 0 auto; text-align: center; padding: 5px;"><b>fine</b></div>	<b>Intensity</b> <small>Clarity of personality definition, balance</small> <div style="border: 1px solid black; border-radius: 10px; width: 40px; margin: 0 auto; text-align: center; padding: 5px;"><b>1.43</b></div>
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### Analyst Comments

[REDACTED] Omnia Profile shows her to be dissimilar to your needs in this legal secretary position. [REDACTED] appears far too independent, people oriented, competitive and assertive to be satisfied transcribing dictation, preparing documents, working with numbers, and handling other administrative duties. She might look forward to the client interaction you indicate, but you tell us this is only 10% of the job. Spending the other 90% on data-intensive, solitary clerical responsibilities would likely frustrate [REDACTED]. While the work is new, she may show some interest, but once her tasks start to feel routine and predictable, we think she will grow restless. She might focus more on clearing her to-do list quickly than on making sure things are done correctly. She could show irritation if she is required to do things according to specific procedures instead of being allowed to accomplish tasks her own way. [REDACTED] seems quite take charge and ambitious. She may try to challenge Alan's authority, though we think he would quickly squelch this since he appears more aggressive than [REDACTED]. Still, the two might not work comfortably together because they are perhaps too similar. Ideally, you need someone in this position who will agreeably take on detail-oriented assignments and handle the details that Alan delegates. [REDACTED] might prefer to be the one handing off the details instead of the one finishing them.

[REDACTED] tells us she is charming and personable. She probably projects a confident image, and she seems able to build relationships capably. People with her personality type often find long-term success and happiness working in management and sales. [REDACTED] needs a job that challenges her on an individual level and rewards her for her solo accomplishments. She probably responds best to short-term, growth-oriented goals, and she needs a fairly significant amount of managerial latitude.

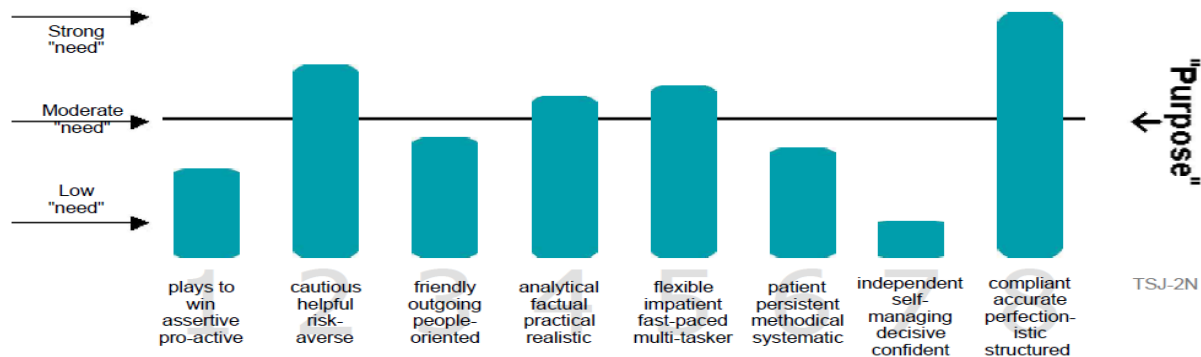
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## The Omnia® Profile Compatibility Rating

Subject's Name [REDACTED]	Profile Number [REDACTED]	Date Submitted 05/19/2009	Client Number [REDACTED]
Title (C) Legal Secretary Req by: [REDACTED]	Analyst PM	QC by CLA	OCR® 8.5

Omnia® Environmental Compatibility Rating <b>OECR®</b> 8.4	Omnia® Vocational Compatibility Rating <b>OVCR®</b> 8.5	Vitality, stamina, alertness, endurance <b>Responsivity</b> fine	Clarity of personality definition, balance <b>Intensity</b> 1.38
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### Analyst Comments

[REDACTED] Omnia Profile results score 8.5 out of 10 when compared with your needs for a legal secretary. This is the basis for a recommendation. [REDACTED] tells us she is a supportive and meticulous team player who is task focused, by the book, articulate, fast paced and service minded. She looks even more detail attentive than [REDACTED] and [REDACTED]; [REDACTED] appears to hold herself to extremely high standards for her output and could even be prone to perfectionism. Therefore, offer thorough training initially and ensure she knows when to call a task complete. [REDACTED] likely prides herself on both the quality and speed of her output. She should find Alan's brisk timetables invigorating rather than stressful. [REDACTED] can likely comfortably juggle several priorities at a time, though she is not likely to rush to the point she risks error. [REDACTED] looks similar to [REDACTED] in her desire to avoid conflict and work in the background in support of others' efforts. She should be self-sufficient within her job description once she knows what is expected of her, but she is apt to seek guidance if faced with anything out of the ordinary.

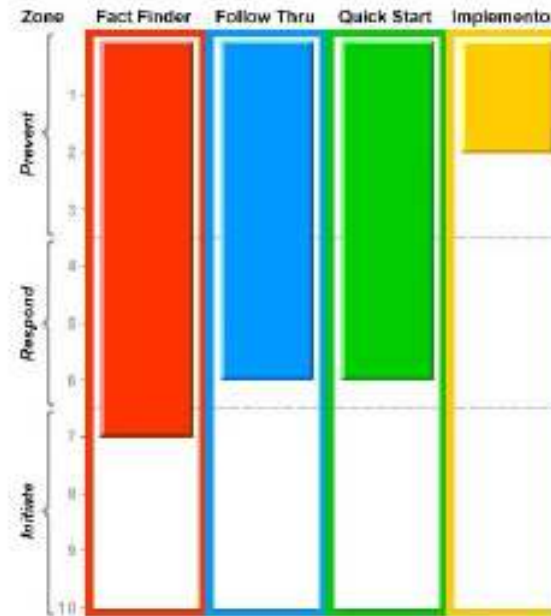
[REDACTED] may be motivated by intellectual challenges. She seems to possess fine critical thinking and objectivity. At the same time, [REDACTED] may be somewhat more people oriented than the target; she may prove adept at interacting in a cordial and helpful manner with clients. Still, [REDACTED] looks at ease spending the bulk of her time attending to solitary duties such as dictation transcription, preparation of documents, and working with numbers. She is apt to possess a keen eye for discrepancies and resolve inconsistencies conscientiously. She may benefit from input on pacing herself and being realistic in her objectives; she could sometimes expect too much of herself and get overextended in the process. Offer structure, thorough instruction and tactful feedback.





## Kolbe A™ Index Results

Marcia Gassman



MO: 7 6 6 2

Impact Factors: Justify Rearrange Revise Imagine

Natural Advantage: Manager ...

*Your instinctive creativity is in developing strategies, assessing options and allocating resources.*





# Don't React Immediately

- Our reptile brain does “flee or fight.”
- There is no way to avoid having an emotional response to challenging situations.
- One of the things that our brain does is prompt an immediate reaction to the situation.
- One of the things our reptile brain does “flee or fight” and prehistoric man (and woman) would not have been able to survive if they did not have an immediate response to dangers, challenges, or otherwise.
- Fortunately, we no longer live in caves, and immediate responses by e-mail or in meetings or on the telephone are simply not necessary, or in the best interests of ourselves or our clients if we are having an emotional response.
- Many lawyers and other professionals are quite adept at setting up opponents or even clients to provide an emotional response that they can then take further advantage of.
- Also, e-mails may sometimes appear to be terse and rude, but are instead simply shortened and less eloquent statements made by someone who might not be thinking about how they might be interpreted.
- The adage to “count to ten and take deep breaths” certainly has a great deal of utility to modern man, and cavemen as well. Ask for a minute to think things through. If you like you can use the excuse that you need to make a phone call, go to the bathroom, or check on something.



# Don't React Immediately (Cont'd)

You can get used to saying things like the following when these circumstances apply:

1. I think I understand where you are coming from, but I need to think this through and I will also probably talk it over with \_\_\_\_\_ and review... and get back with you.
2. Thanks very much for...
3. I'm very surprised that you said that and simple will not respond at this time.

B. But if you “lose it” or say the wrong thing, or realize an hour later that you made a big mistake, apologize immediately and tell the person that they will get a less emotional response from you the next day.

Then talk it over with someone who you trust and come up with the appropriate response to get it off of your list of things to worry about.

The same applies when interacting with office staff and family.

Why come to blows or risk doing something that can cause loss of a good relationship, someone else to be upset, or undermining the ability to have productive team work.

Immediate reprimands work well with children, but not necessarily with employees. Let yourself cool down before deciding exactly how to communicate, unless you have already thought through the response in advance and know that it is appropriate based upon what the person has just done.



# “Ask Me Tomorrow and Hopefully I Will Have an Answer”

Quite often a team member will ask me a question and my answer is “ask me again tomorrow.”

- I will then write the question or matter down to allow my subconscious mind to be activated to begin thinking through what the decision will be.
- The next day, or sometimes the day after (“ask me again tomorrow, okay? I will have an answer – it may come to me subconsciously or while thinking “offline” in the shower, shaving, or otherwise”).
- Sometimes I know the reason for the answer I chose, and sometimes my mind has decided this for me.
- And given the choice between (a) making sure that no one has sent you anything on Facebook in the last half hour or (b) picturing yourself in the neatest place you have ever been or want to be with whoever you would prefer to have there with you, which do you choose?

Great ideas typically happen when you are “offline” from work, but not normally while you are plugged into social media activities.



electrical vibration—anything you please, but that's the force that brings outstanding results, sets the law of attraction into operation, and enables sustained thought to correlate with its object. This belief changes the tempo of the mind or thought-frequency, and, like a huge magnet, draws the subconscious forces into play, changing your whole aura and affecting everything about you—and often people and objects at great distances. It brings into your individual sphere of life results that are sometimes startling—often results you never dreamed possible.

There are countless references to it in the Bible. It is the first condition for membership in many religious, fraternal, and political organizations. Everywhere men are looking for people who have the kind of belief they will fight for, because it is the people who are charged with the vibrations of strong beliefs that sometimes do the miraculous, the things we so often say are "unbelievable." That kind of belief has the magic touch. It is also the basic principle in both white and black magic.

### CHAPTER III

#### *What the Subconscious Is*

"THERE IS no artist, man of science, or writer of any distinction, however little disposed to self-analysis, who is not aware by personal experience of the unequalled importance of the subconscious," wrote Gustave Geley, distinguished French psychologist and author of *From the Unconscious to the Conscious*. He said also that the best results in life were obtained by close harmony and co-operation between the conscious and subconscious minds, and he pointed out that up to the nineteenth century the psychology of the subconscious was completely ignored, and it was then considered only as the abnormal outcome of disease or accident.

As the subconscious plays a very important part in the



# BUILDING YOUR CATHEDRAL – Page 1

TIME DESCRIPTION/ACTIVITY	RATE IMPORTANCE (1-10)	RATE ENJOYMENT (1-10)	RATE EFFICIENCY (1-10)	DELEGABLE (Y/N)	ELIMINATED? (Y/N)	POSSIBLE IDEAS FOR IMPROVEMENT
		1 = least – 10 = highest		If yes, who?		
From waking up, until I leave the house on a weekday.						
1						
2						
3						
4						
5						
6						
7						
8						
From leaving home to arriving at work.						
1						
2						
3						
4						
Morning routine once I arrive at work.						
1						
2						
3						
4						
5						
6						



# BUILDING YOUR CATHEDRAL – Page 2

TIME DESCRIPTION/ACTIVITY	RATE IMPORTANCE (1-10)	RATE ENJOYMENT (1-10)	RATE EFFICIENCY (1-10)	DELEGABLE (Y/N)	ELIMINATED? (Y/N)	POSSIBLE IDEAS FOR IMPROVEMENT
	1 = least – 10 = highest			If yes, who?		
From after morning routine until lunch.						
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
My weekday lunch time routine.						
1						
2						
3						
4						
Post lunch activities.						
1						
2						
3						
4						
5						
6						



# BUILDING YOUR CATHEDRAL – Page 3

TIME DESCRIPTION/ACTIVITY	RATE IMPORTANCE (1-10)	RATE ENJOYMENT (1-10)	RATE EFFICIENCY (1-10)	DELEGABLE (Y/N)	ELIMINATED? (Y/N)	POSSIBLE IDEAS FOR IMPROVEMENT
		1 = least – 10 = highest		If yes, who?		
What I do just before I leave the office.						
1						
2						
3						
4						
5						
6						
What I do on the way home.						
1						
2						
3						
4						
Arriving at home until dinner.						
1						
2						
3						
4						
After dinner until going to sleep						
1						
2						
3						
4						



BUILDING YOUR CATHEDRAL – Page 4

TIME DESCRIPTION/ACTIVITY	RATE IMPORTANCE (1-10)	RATE ENJOYMENT (1-10)	RATE EFFICIENCY (1-10)	DELEGABLE (Y/N)	ELIMINATED? (Y/N)	POSSIBLE IDEAS FOR IMPROVEMENT
		1 = least – 10 = highest		If yes, who?		
Approximate hours of sleep.						
Exercise ideas.						
1						
2						
3						
4						
Relationship ideas.						
1						
2						
3						
4						
Me time ideas.						
1						
2						
3						
4						
Avoid like the plague?						
1						
2						
3						
4						







STETSON LAW

**THANK YOU FOR PARTICIPATING!**

# **Slay the Summer: Killer Tools You Can Master (Gassman in the Hot Seat)**

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