



the slack of another employee know that it leads to resentment. Take the Navy SEALs for example. Each member has a particular job and position on the team. There must be absolute trust in a particular position because situations pose life-or-death threats. That may seem like an extreme example, but clients may come into your office facing a life-or-death accusation. They are relying on your team as well. We all must rely on each other and trust that a complete and accurate job is done. So, by staying in your lane and doing your job to the best of your ability, you help the firm know when the wrong person is in the wrong seat. Frequently, the implementer will be able to discover a problem within the first session, and it is usually not a surprise. Sometimes, it is essential to fire someone to strengthen the team.

The accountability chart starts with the visionary at the top. Who is the business visionary in the firm who thinks freely, imagines growth, and visualizes the possibilities for business and law? Below the visionary is the integrator. The integrator takes the dreams of the visionary and plucks one or two (or 20) of the rational, actionable ideas, and transmits them to the management team. The integrator is the most critical role in any organization. The integrator manages the managers of the departments and communicates with the visionary. The managers should never skip over the integrator and discuss issues directly with the visionary. The visionary is

usually a “yes” person, while the integrator stays on task and makes the tough decisions a reality. The managers should have employees below them for support. Law firm management positions could include marketing, finances, human resources, paralegals, lawyers, building, and automotive. In a small criminal defense firm, you may not have that many employees. People can share roles, but it is important to recognize which hat you are wearing and in what role at any specific meeting you are filling. In our firm, the visionary is also our CEO and head trial lawyer. The visionary shares the role as manager of the attorneys. Attorneys report directly to the attorney manager for questions related to law. However, if the lawyers need administrative support, they contact the HR manager. This serves two purposes: 1) It doesn't bother the visionary with unnecessary decision making and 2) It keeps the accountability chart in check.

Once you have your team and accountability chart, you will begin the process of preparing your vision. Your management team and your implementer will determine what makes your firm unique and where your firm wants to grow. Part of that Vision/Traction Organizer, or V/TO, will be to define your core values, which must be unique and encompass the culture of your firm. These are core values that every employee at your firm must exude. If they do not, they will not be happy working at your firm and you will not be happy with them either. When it comes time to evaluate employees at our firm, we grade them on whether they exemplify our core values. The grade is a plus, plus/minus, or minus score for each core value. If they have any minuses, then this is brought to their attention and they will be reevaluated in 60 days. At that point, if they are still below the bar, they are removed because they are not the right person for our firm. We are not doing an employee any favors by keeping him or her in a role that does not connect with his or her natural personality. In the end, the more cohesive the culture, the more cohesive the firm. It works.

After the core values are established, the firm should develop a Core Focus, which includes your purpose/cause/passion and niche. While it seems simple to do, it should be less than seven words that succinctly state the heart of the firm. For example, ours is: “Fighting for the People and Winning.” That is something that took us hours. What do we do? We fight. We want associates that are competitors outside and inside the courtroom. Once we realized our firm's purpose/cause/passion, we started hiring and looking for candidates with an athletic or competitive background. While this intensity is not for every firm, it works for ours. Next, who do we fight for? The people. We love being David versus Goliath. And lastly, do we just fight? No! We win. We want to win at everything, every time, which led us to establish our firm pledge: “Obsessed with Winning.” Every member in our firm is obsessed with winning. From the lawyers to our receptionist, each member of the team is invested in clients and our outcomes.

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There are additional parts to the V/TO, which include multiyear targets and marketing strategy. Each of these parts are just as important as the others and need to be revisited and discussed each year to determine viability.

Once the V/TO is established, it is time to do work. Together, you will next decide your data, issues, and process. Compile data with the goal to determine four to seven numbers that establish the health of the firm. Each Monday, our visionary gets a report that states the week's new client meetings, percentage closed, cash balance, and marketing analytics. That five-minute recap is worth its weight in gold. Once you pinpoint issues, you can start automating processes and making the firm more efficient.

This has been a very quick intro into EOS. Tools and structures for any scenario and any business are available. EOS may not be for everyone as it is a tremendous commitment to structure. If EOS seems interesting to you, our door is always open, and we encourage you to seek out an integrator to achieve your dreams. No matter how daunting a task or venture may seem; everyone has the opportunity to succeed.<sup>4</sup> **TBJ**

*The authors want to thank their firm's personal implementer, Chris McCarty, for all his guidance in EOS.*

## Notes

1. Indigent Defense Data for Texans, Texas Indigent Defense Commission (In 2022, Harris County's indigent defense alone cost \$96,951,404.40), <http://tidc.tamu.edu/public.net/Pages/CountyDashboard.aspx?cid=101>.
2. Entrepreneurial Operating Systems, [www.eosworldwide.com](http://www.eosworldwide.com).
3. <https://www.855mikewins.com/fireproof/>.
4. Sometimes attributed to Daniel Webster in response to warnings against becoming a lawyer.



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