



## LNP 292

### The Power of DISC to Understand Attorneys

Curtis Johnson

**Pat:** This is Pat Iyer with Legal Nurse Podcast, and today we're going to be talking about something that influences you when you're working with attorneys, with staff, with subcontractors, and with virtual assistants. That's how personality differences and styles impact your business.

I have with me today a man who is an author, a speaker, a coach, and a consultant. He started his company, Cuvey Group, two years ago. He's in the business of accelerating the performance of people and affecting businesses and organizations. I'd like you to welcome me in joining Curtis Johnson. Curtis, welcome to the show.

**Curtis:** Well, thank you. Thank you for having me.

**Pat:** You and I met when we were in Miami at a conference learning how to quickly write a book and in the process of talking on one of the breaks, I found out that you were very skilled in DISC assessments and personalities. For people who are not familiar with DISC, could you give us an overview of what is that?

**Curtis:** Yeah, sure. Just think of it as a simple, practical, easy to do, and universally acceptable model. It's based on research by Dr. Marston and it's widely used in identifying behaviors. It's a tool that is supported by many decades of research and validation. It focuses on an individual pattern of external, observable behaviors, and it measures the intensity of those characteristics using scales of either directness or openness. That puts you in one of those four quadrant areas that we'll talk more about. It will either be the dominance, the influence, the steadiness, or the conscientiousness.

So, it helps people understand their behavior in one of those styles. It's very easy to assess, and it's observable. I think that's the really big thing about it: You could observe and for the most part be accurate in describing that person when it comes to those four quadrants.



**Pat:** Let's talk a little bit about those four quadrants because I think that's really at the heart of the DISC assessment. Are these different personality styles, or is there another way to categorize them?

**Curtis:** You know, often people will refer to them as personality styles. I tend to say more than just a personality. It's more of a behavioral style, right, so sometimes people can exhibit different personalities based on maybe the situation or mood that they're in. But, if you look at this, this is more of a behavioral style, an observable thing that can be quietly done and when people are watching. Some of the nuances with personality are that sometimes it can be exhibited or skewed based on how that person is acting or feeling at that point.

Something that's of the DISC nature is observable. Merely walking into your office in some instances can tell me a lot about who you are as a person. It tells me the things that I would have to do to understand that and be able to communicate to you in a way that will be very effective.

So for instance, if I walked into your office, and it was neatly compartmentalized, and papers were neatly put here, that tells me a little bit more about your behavioral style. That would make me react differently in how I would communicate with you in a way that would be accepted by you and appreciated by you. I can base my response on my observation of your surroundings and the work environment that you surround yourself in.

**Pat:** I think that's a key point because I know, for example, that if I go into a situation where nobody seems to be in charge and decisions have to be made, I have a tendency to take over because that decisive part of my personality rises to the surface but typically I don't behave that way. I tend to be steadier, more conscientious, and we'll talk about these categories most of the time, but when I see a vacuum, my behavior shifts.

Now is that characteristic of DISC in general, that people will react differently in different situations?

**Curtis:** Absolutely. You know what we measure here, we measure two distinct styles. There's a natural style, and then there's an adaptive



style. And, the good thing about this is that we all have some aspects of these four quadrants in our life, right, and so the most important part is for you to observe and understand what's the most dominant quadrant and your natural style as opposed to your adaptive style. So, for instance, naturally what may come out in your DISC profile assessment is that you may rank steady and conscientious in your natural style, but in an adaptive style where you're either engaging with a client or you're engaged in a work project, you may ramp up on another aspect of that DISC profile.

And so, we're able to measure that and work with people to help them understand what their most natural style is, and, more importantly, how to begin to work with those areas. Maybe there's some development areas they need to work with there, but we can really help clients understand themselves a lot more and how to utilize these different buckets to begin to communicate to people across different styles based on what that style may be and what's the most effective way to communicate with them.

You may give it one-and-one in an arena and it automatically shifts based on the work environment, and the good news is that you have the flexibility to do that. The challenge of it is that if you are outside your most natural adaptive style for a very long period, that becomes very exhausting. And, we all know when things become very exhausting, you may identify the "Wow, this is not any fun anymore. I'm exhausted when I come home from work" or "I'm not having any fun because I'm really outside of that comfort zone."

And so, we help clients realize that, and we also apply this to actual cultures of organizations. So, it's a way to understand your entire organization and maybe why there are some challenges there. And so, as we work with clients to help them understand not only themselves, we may also help identify what that culture is and address issues that aren't even being discussed.

**Pat:** Let's get into the four quadrants and talk about the four personalities and start with the decisive one. Tell us how would you know that somebody was exhibiting the decisive, the definitive, and some people use the D's in different ways. What's that personality like?



**Curtis:** You know one word comes out as dominance, direct, a matter of fact. They speak in bullet form sentences. They're very direct. They tend to be more open in aspects of open but they're very direct. They're very task-oriented to get things done. Those are some of the characteristics in the direct buzzword of a person who has the "D" characteristic.

The next one I'll talk about would be more of the influence or the "I." Those are the people who are really about the people. They're influential by being known, having a reputation. They love being around people. They're quick to drop names and make associations with their circle or the people whom they associate with, and so they're influenced a lot by some of the characteristics we may know as kind of the social butterflies of the organization. It really about their networking and relationships that they have. Again, they're open people, just you know, tend to be sometimes task oriented as well. They're in the same paradigm as the "D," so they're kind of open and direct there.

Now as we move across the spectrum on the bottom left, those are more of your steady people. Those are the people who are just consistent. They're there. They have a kind of steady pace to themselves as opposed to an "I." They're not as energetic and outgoing. They're kind of quiet. You're going to have to ask them questions and get their thoughts about things. They really like the "I value" relationships with people, except that they're just not out there broadcasting this. They value those relationships and you really have to get to know the "S's" and I liken it to the point of when you have an "S" on your side and they're really in your corner. They're in your corner because relationships matter the very most to them.

These are the people who, when you walk into an office, you see pictures of their family—like I see a picture of your family member back there in the background. They want you to know about them. They value those relationships, and when you begin to understand that and behave in the aspect that helps them connect with that, you have a friend for life, right, and they're always concerned about the people.

The last quadrant, which is in the top left, again is conscientious. These are excellent people to have on your team because these are the people who help the D's and the I's because they're the people who pay



attention to detail. Those are the people who are going to ask a lot of questions, and sometimes they'll ask them verbally, or sometimes they'll ask questions by simply not asking questions. And if you've got a "C" in your room, you really need to understand and ask them their thoughts and opinions. They're not going to be as open. They're not going to be as direct as a "D" or an "I." They are the opposite of that, but those are the people who save a lot of organizations because they get into the details and the nuances, and they value that.

Sometimes they may be challenged to make quick decisions because their brain is calculating the data that they're wanting to have, and so it's important to understand when you're talking to a person who's a "C," they're really crunching the data, and you are going to have to provide them a lot more. And so, as you cross the spectrum from them, and you're used to giving bullet points and quick answers, they want a little more information. Sometimes you have to kind of prod them along to help make some of those decisions because they never really have all the information they really truly want to make those decision.

So, how did I do with that? Does that kind of give you an overview of those areas?

**Pat:** Yeah, it does and what's fascinating is that the whole legal field, which is how our listeners are connected, is built on details. "Who did what, when, and how?" "What happened to the patient?" We're all focused on somebody who got injured in some way.

**Curtis:** Right.

**Pat:** So, I've seen attorneys come into a conference room to depose an expert witness, and they have their yellow-ruled pads, and they've got all their questions laid out, and they've got a pen in their hand. And as they go through each question, they check it off, and they make sure that they've asked it, and they've gotten a full answer. And then, they move on to the next, and they can never get enough time to ask questions of the expert witness.

So, how am I doing in terms of describing one of those personalities?

**Curtis:** Absolutely spot on and I think as I mentioned before is that we're all certain paradigms of this entire spectrum, so we all have some D's, we all I's, we all have some S's, and have some C's in us. But, it's the ones



that particularly in the legal profession—as you described—some of those lawyers may tend to be more of the "S" and the "C" type of behavioral based on the work that they're doing. And, I would expect to find that, and I think that's to be spot on, but what I would say is that I also know some lawyers that are high in the "D" and the "I."

And a lot of those guys you may see on television sometimes or billboards or in a lot of social networking scenes, and you tend to kind of see them posting a lot more of the societal shots of them engaging with people. And so if I would have to examine that person and just mark an observable behavior, I would probably say that if you see attorneys who are a bit comfortable with that and posting a lot of their social interactions, that's a clue as well they may have some dominance when it comes to the characteristics of a "D" or an "I" in particular based on just their openness that you can observe from looking at their social media platforms.

**Pat:** And, I think that's a key distinction. The defense attorneys have contracts with insurance companies, and that work comes in. Somebody sues the local medical center, and the insurance carrier assigns it to the law firm. Those defense attorneys in general are not going out constantly looking for work. The plaintiff attorneys must be visible. They must have connections so that other smaller law firms will refer cases to them, such as complicated medical malpractice or big personal injury cases. They need to be the ones who are the rainmakers.

**Curtis:** Yes.

**Pat:** They need to be out there in order to do so and that's not a comfortable role for some of the attorneys who go through law school, and they learn about the arcane aspects of law. But I think almost all of my clients told me that nothing in law school prepared them for setting up a practice, running a business, hiring people, getting the team to function together, attracting work. None of that entrepreneurial content was taught. And I don't know if it's different now, if law schools are acknowledging that lack of content, but it's a rude shock to many attorneys who want to go into practice and then suddenly, they're not prepared. And, they probably have had no



exposure to DISC or personalities or knowing who to hire or how to make that team function well.

How does that interplay? Tell us about the way that DISC influences the dynamics on a team.

**Curtis:** Pat, thank you, that's a great segue, and certainly those attorney firms out there if they've not had consultants like myself working with them to understand their team, the whole exhilaration of the performance of that team, that's the type of work and research that I do with companies to help them understand the team players. And so, as you alluded to, understanding, number one, who's on the team and who may be comfortable in that rainmaker role, as you've described. Things can be flushed out by using these types of assessments. It also can help build that team. So, if you were to come in or bring me in as a consultant and looking at one of these case studies, and I determine, and we determine that the entire law practice is slanted towards splitting aspects of the DISC profile, that maybe answers the question as to why revenues were down or why certain things are done a certain way in a practice simply because the team is slanted towards one particular aspect.

And so, we kind of call those the growing pains, right, of knowing, number one, if you want to grow and you haven't understood what you need to do to grow, and then you force people to do things that they're obviously not comfortable with, are you really getting the growth there? We're able to help organizations, teams, understand who's on the team and more importantly how to begin to attract the people to those teams based on what you need.

And in a lot of cases in hiring situations, you may be down to one or two candidates who are really exceptional candidates and this type of data will allow for you to have just one more piece of information that may point your actual direction of hiring a candidate over another based on what they would bring to the team on this type of assessment. So, those are all the different types of things that this type of assessment could be used for in coaching.

We've certainly worked with retention as well. As I mentioned earlier, if you have people who are outside of their comfort zones in certain roles for a



long period of time, you really must be concerned with what's the retention long term and whether you're measuring that. Are you benchmarking that in your organization to understand if we have people in the right aspects of these job functions? And if you're not, then certainly this is a study that you need to undertake so that your HR department is not becoming your most expensive part of your business simply because you're losing a lot of people to turnover. And, that's probably because they're not in the right category or the job aspects that you have them.

So, thank you for asking that and I think that any practice, particularly we're focused on the legal entity now, this is highly applicable to what you have when you're building a team.



You can have an aggressive marketing program to bring in new clients, but if you cannot retain them, you'll be endlessly spinning your wheels. Client retention is founded on understanding what attorneys want, how they are wired, and how you can keep them returning with more cases.

When I ran my independent LNC business, about 80% of the clients were repeat clients. Some had worked with me for more than 20 years. I share my strategies of



how I created such successful LNC-attorney relationships in my book, called, **How to Create Lasting LNC-Client Relationships**.

Get great insights about attorney personalities that will help you maintain strong relationships with your clients by ordering your copy of **How to Create Lasting LNC-Client Relationships**, my newest book, on the show notes for this podcast-located at [podcast.legalnursebusiness.com](http://podcast.legalnursebusiness.com). Use the code **Listened** to get a 25% discount off the price of the book.

**Pat:** I just heard an example that illustrates what you're talking about. In a conference I attended a couple of weeks ago, the woman who was running the conference said that she hired a bookkeeper and shortly after this person got into the position, she saw her desk was covered with paper. There was no organization whatsoever, and this individual was just buried in the details, but she was able to shift her over into a customer support role, and the woman thrived. It was what she wanted to do.

The people who are listening to this program are most likely solo practitioners who are getting ready to either hire a virtual assistant or maybe bringing in an employee. At least some of them listening to this program will be in that situation. Are you suggesting that they get a DISC assessment kit and use that when they are interviewing people?

**Curtis:** Absolutely, I think they need to. I think, number one, if they haven't done a DISC assessment on themselves, I would highly encourage that because this DISC assessment will tell you more and help you communicate yourself to them. So, if you're looking to hire that virtual assistant, wouldn't it be wonderful to know some great things about yourself. Know your strengths, as well as your development areas, so that you can now understand what you are actually looking for so when you hear that person talk about their qualities and strengths, that may match up into an area where you are challenged in your development.

So, the first thing I would say is absolutely, first get your own DISC assessment. What I'm also saying is that if you're looking to hire that person, I would take them through a DISC assessment much like when I work



with clients. I get a DISC assessment and I share my DISC assessment so that they understand who I am, and I understand who they are. And that's the most important part when I'm working with a client: that I understand who they are. And what I'm at there is to really play by the platinum rule that I want to communicate to that person how they want to be communicated to and not how I want to communicate to them based on me. But, if I understand them and their behavioral style by using this tool of DISC, I'm now able to communicate to them in a way that's going to be most receptive and effective for me to have an effective communication channel.

And so, for instance, if I know that person tends to be more direct, I'm going to be direct with them and give bullet point information. If I know that they're probably more "S" or a "C," I'm going to probably get that relationship going really quickly and fast, and make sure you're comfortable with that so that we can do a deeper dive into the problems and addressing those particular issues.

If I know that they're "C," well, I know that I'm going to have to take my time, slow my pace, and really ask them for feedback. I'm going to have to prod them along to tell me what they're thinking because they have thoughts, but I must make sure I understand what they're saying because that's the most important thing at that aspect.

**Pat:** And I know you alluded earlier to what happens if your team gets loaded up with one type of personality. Can you expand on that?

**Curtis:** Yeah, Pat, that's what we call the old cog in the wheel, right? You have progress, but it's not moving along. We all think alike; we react alike; and so, the same. So, if you have all of the people who tend to be dominant on the indirect side, maybe a lot of the S's and the C's, then you have to worry about the pace in which things are getting done, the decisions that are being made. Sometimes it will take a little bit longer to decide because there's more push for more data and sometimes in certain situations, maybe in the legal field, where we must have sometimes some responsiveness and rapidity to some of those decision makings. And sometimes, you have to kind of go with a more educated gut feeling based on some past experiences, but if



you're requiring more data and more analysis, you may just miss that opportunity.

And it's great to understand your team and understand the balance on your team and really have someone in all those quadrants. You mentioned earlier that certain plaintiff attorneys, I think you mentioned, must go out and be rainmakers, right. So, if you have people that are more on the "S" and the "C" side, that's really not something they're comfortable with and it's important that you have those rainmakers because if you don't have rainmakers, you don't have money coming in the door.

**Pat:** That's true and I was just listening to you thinking about that expression, "Too many chiefs and not enough Indians."

**Curtis:** Yes.

**Pat:** Everyone wants to give direction, and nobody wants to do it.

**Curtis:** And I use the "S" and the "C" a lot, but you can flip it to the opposite side, right. So, if you've got a lot of the "D" and the "I" on one side, you've got everybody who wants to be in front of the camera. You've got a lot of chiefs over there, but nobody is doing the real work that needs to be done and the detail that needs to be paved or the relationships that really need to be formed, the deep relationships. And so, it's good that you understand your organization and can really get an assessment of who you are and what your organization is, and we help plot that.

We actually bring that in and work with companies to say, "Hey, here's your organization. Here's where you guys are on a pie chart here, and let's look at this." It becomes pretty obvious at some point that, "Wow, we're kind of dominant on this side of the equation. What do we need to do as we move forward, and who are some of those people we need to think about bringing in?" And as you evaluate candidates, you know this process could also be a part of that interview process, particularly when you get down to the last couple of candidates if you would like to really a decision of, "Okay, we really like this person. They met the aptitude of what we're looking for, but what else do they



bring to the table?" and that's the question that DISC assessment can help you answer.

**Pat:** I did a DISC assessment probably three years ago and it was a revelation to me because I knew as a nurse and as a legal nurse consultant that I was very focused on the details, but I didn't realize how that fit into the steady conscientious quadrant. In the room with me were about 10 other entrepreneurs, and they were very high on the influential scale. Most everybody was either decisive or influential.

When we did exercises, the influential people wanted all the colored markers and the stickers and the crayons, and I'm looking at it saying, "A pen is enough for me. I don't need anything other than black ink, like what's all this fluff stuff?" We were just focused on two different worlds, and it made me realize how we were looking at the world differently. The same set of questions, the same discussion, but our responses were so different.

**Curtis:** Absolutely and that's a very practical point, Pat, that you mentioned there. And I think that DISC sometimes helps to flush this out and it also helps to answer those questions. As entrepreneurs, like we both are, as we build our organizations and look for collaborations, it's always great to have something, kind of a guide to help us understand who we're communicating to and how we're building our organization with this type of consciousness in mind.

And I must implore entrepreneurs and people who are building organizations that this needs to be a cornerstone of how you lay that foundation if you want to be effective. And, it certainly will help cut down on that costly investment, right, which is when we bring people aboard.

One of my mantras, as you mentioned earlier, is "Accelerated Performance of Your Team" and this is how I help to do that. We help to coach people, particularly to some of the nuances in their actual assessments that we get and address, and sometimes you need that follow-up. It's not just taking an assessment, getting it once and reading it, but it's how now you begin to ingrain this into the culture in your organization that you're working with. And that's where coaching programs I find and leadership development programs to help people work through some of this stuff come into the picture. Some of it is



straight forward, but some of it is very complicated, and some of it is very challenging because it may challenge where you are core thinking and where you thought you were. There are some areas where you probably need some guidance and some coaching to work through some of these challenges. And just as soon as you get this and you start this process, inevitably something happens and you either drop the focus or something else comes up in an emergency, and you don't get back to this.

Coaching platforms begin to help you address these issues and work through them on a consistent basis so that it becomes natural to you and ingrained in helping you move forward.

**Pat:** Yeah, I think that's a great point. The nurses who are working with attorneys who are entrepreneurs must be able to spot the personality style of the attorney whom they're working with or they're marketing to and recognize that quickly and then adjust their approach. And I think you gave us some really good tips about looking at the reactions of the person and then modifying your style accordingly even if that is not your natural style, but to be able to communicate well with another person you have to be able to gauge their reactions.

**Curtis:** Yes.

**Pat:** For the nurses listening to this, this is much like working with a patient and figuring out, "All right, I have to go in and teach the patient something. Is this person a visual learner who needs a pamphlet and a step-by-step? Is this an auditory learner who will listen to the instructions and get them or a kinesthetic person who wants to be able to handle and touch and feel, and be involved in the activity?"

The DISC personality styles are a different realm, but we as nurses know how to adapt our behavior to the person that we're interacting with because we do it all the time when we're taking care of patients who come in all different shapes and sizes, and personalities. And when they are ill, they're not necessarily the happiest people to work with.

**Curtis:** Excellent point, and certainly I think this is highly applicable in this situation.



**Pat:** If somebody wanted to figure out how their personality laid out in the DISC assessment, what resources could you suggest for them?

**Curtis:** Well, we work with individuals and organizations all the time, so if they wanted to visit my website of The Cuvey Group it's [www.TheCuveyGroup.com](http://www.TheCuveyGroup.com). And on that website, particularly in the... in the Cuvey Store, you will see where a person can either do an individual assessment, meaning that it's just one time and they just want to get their report and there's a small cost for that. Or, if they wanted to include some coaching and some feedback where I work with them through this 45-page document and help them begin to understand what's in there, there are some opportunities to do that.

There's a package that gives them an opportunity to do just a one-time coaching session, which we'll do a complete debrief of the report. And certainly there are opportunities that if they want to go further than certainly you know we can do a consultation of what that would look like, and then we would actually, you know, work with them to craft something that would be very amenable to their budgets, and more importantly allow for them to program this over a sequence of different interactions with me.

**Pat:** I think you're offering a great resource. The more we understand about our personalities and how we interact with the clients that we serve, the better we are equipped to be able to recognize personalities effectively, help our clients and know what our trigger points are. You mentioned earlier you can be put in a situation where your style is foreign to your personality, like I'm not an influential person. If you ask me to network all day long and go into a room and meet as many people as possible, I could do it, but I wouldn't enjoy it. I'm much more introverted and much quieter and more withdrawn. So, you know, you need to understand that about yourself and figure out what is the style that's going to best suit your business and the clients that you're working with.

**Curtis:** Absolutely, absolutely, and thank you for recognizing that. And like I said, you would be exhausted at the end of the day.

**Pat:** Oh yeah.



**Curtis:** So, you would have to say, "Could I repeat this as many times as needed" when you're in that business development aspect? So, that's what networking is, right. It's business development work. You must get those relationships going, and it's exhaustive work. And if you're very uncomfortable with that, the good thing about it is that with DISC you will know what your comfort styles are, but you will also know some practical ways of how we can effectively do that to help you realize that this is important. And if you don't want to do it yourself, maybe you want to outsource that and farm that out to someone that's comfortable doing it.

**Pat:** Right, exactly. Well, thank you, Curtis, so much for being part of the show.

**Curtis:** Thank you for having me.

**Pat:** And this is Pat Iyer, we've been talking with Curtis Johnson about DISC assessment. Be sure to listen in next week. We'll have a new show and a new guest. And, thank you so much for your comments and your ratings on iTunes for Legal Nurse Podcast.

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