



443

The LNC as CEO

Sheri Berke

Every business must adapt to shifting external circumstances. Sheri Berke, a reinvention coach and money strategist, gives clear guidelines on how with a vision, a mission statement, frequent checkups on goal achievements, and time out to take a breath, you can affect the success of your LNC business from the inside out.

When we're entrepreneurs, we are also the CEO of our business. And one of the responsibilities is to have an intention to define that vision and that mission.

A vision acts like a destination when you're leaving your house. When you walk out the door, you know where you are going, and you can very easily plot a way to get there or use a GPS. And a vision operates much like that for our personal lives and for our businesses. When we have a clear picture of what we want to be doing, what we want to have in our life, and what's meaningful for us, we have a much better opportunity of making good choices and making great plans to make that vision real.

Legal nurse consultants work with very serious cases with people who can be catastrophically injured for the rest of their lives. And there's a lot of sad stories involved in the lawsuits when people get injured. We're intense, we do a lot of concentrated work, where every word we say and every word we write can have significance. So, This show will point out that we need that to season some of the more intense work that we do.

Key Points in This Episode of *Legal Nurse Podcast*:

- Why is it important to have a vision for your business?
- What is the value of entrepreneurs seeing themselves as the CEOs of their businesses?
- How does your mission statement communicate who you are to the world?

- Why do you need to frequently track your goals and make sure they align with your vision?
- How can meditation or focused breathing give you the mental clarity to solve problems?

Patricia: Hi. This is Pat Iyer with *Legal Nurse Podcast*. I have with me, today, Sheri Berke, who is a reinvention coach, she is a money strategist. She works primarily with female entrepreneurs. And I thought, well, this is a great match for you. I met Sheri at a networking event for a coaching program that we are both in, and we debated about what would be the most useful information to help you in your business. So, we talked, specifically, around the reinvention part of Sheri's skill set. And to begin with, Sheri, I would like us to focus in on having a vision for your business. Tell me, why is that so important?

Sheri: Well, a vision acts like a destination when you're leaving your house. When you walk out the door, you know where you are going, and you can very easily plot a way to get there or use a GPS. And a vision operates much like that for our personal lives and for our businesses. When we have a clear picture of what we want to be doing, what we want to have in our life, and what's meaningful for us, we have a much better opportunity of making good choices and making great plans to make that vision real.

Patricia: Can you give us an example of perhaps a business owner you worked with whose vision was unclear and how that manifested in the business?

Sheri: I absolutely can do that. I was working with a woman who was, still is an architect. And she had gone through a number of life situations fairly concurrently. She had left a long-term personal relationship, a marriage, and she had also ended a partnership with her business. So, she was at that point in her life where she was not real clear on exactly who she wanted to work with and how she wanted to get there.

And we spent some time together, working on having her get more clarity in what her life would look like in three years from that point. And it sharpened everything for her. It gave her the opportunity to see where she wanted to be going with her business, as well as the things that were important in her personal life, and allowed her, then, to make choices that were consistent with that direction. And it just

started to show up immediately in her state of mind and the activities in her business.

Patricia: What strikes me is she went through two changes, significant personal and business changes simultaneously.

Sheri: Yes.

Patricia: Someone described a partnership to me as like a marriage without the sex.

Sheri: Exactly. And when we have those kinds of relationships in our lives that unwind or even come together, it causes us to have a level of change that we may not appreciate, and we may not fully understand the impact on everything that we're doing.

Patricia: I know that the legal nurse consultants listening to this podcast have probably worked in healthcare environments where the facility says this is our mission and this is our vision statement. How do we make that real in our own businesses?

Sheri: Well, to make that commitment to your business is very much the act of the CEO of the business. And when we're entrepreneurs, we need to realize we're also the CEO of our business. And one of the ways of doing that is to have an intention to define that vision and that mission. And you may have that intention, but if you haven't done it before, you may need some support from someone who can help shortcut it for you.

As I mentioned about the vision, that sets your direction, and your mission statement is frequently the same thing that you share with the world that essentially says who you are and what you're up to. And one other component within that is also the values that you hold for your business. And a value statement is kind of that additional piece that says to the world how you treat people, how you find importance in relationships, what kind of a business you are. And it helps people get a sense of the integrity of the business because a business owner that has taken the time to think that through and to put that statement out there is very much in charge of their direction and where they want to be going.

Patricia: I think you've touched on, in your example, a concept that's very important for legal nurse consultants, which is integrity. There were instances that occurred in the course of a year, when I was running my legal nurse consulting business. My integrity was tested, at least a couple times a year around issues of the attorney gave me, let's say, \$2,000, and I used up \$1,700 of it through services on the file.

Some business owners would say, "Well, the \$300 is mine." My policy always was that I would return unused portions of retainers. And when I first started doing it with my clients, they said, "Oh, Pat, why are you doing this?" "Well, I didn't earn that money, so I'm returning it to you." "When do we give money to doctors, they just keep it. We never get anything back from them." I had so many people who were grateful and gave me repeat business because they knew they could trust me with their clients' money or their money and that I wasn't going to just let it fall into a big pot, and they would never see it again. It's those decision points that make your integrity stand out.

Sheri: Absolutely. And some of the things that need to be in place to support that integrity are the pieces of our business that we don't always think about, but it is the existence of them that says we are a professional and we operate with integrity. And some of those include having a strong agreement that outlines exactly what the responsibilities of each individual. Another one is having a good timekeeping system so you can track well the time that you're spending. And then the accounting system that allows you to put the dollars to the time that you've spent so you can say, "Here's I've spent \$1,700 of work time and here's \$300 back."

Patricia: I know another area that you've worked with, with people is on setting goals. And we are recording this in the middle of February. January seems to be a real popular time for setting goals for the year. Can you give us some tips on that process of setting direction for our companies for the year?

Sheri: Well, setting goals don't have to be a once and done process. In fact, a process of setting goals can start anytime. And to be effective, it's how you make that vision happen. And you want to tie back to your vision, you want it to be reflective of the direction you want to go for the year. And at some point, whether it's quarterly, some people do it

monthly, you want to set and look at your progress against those goals.

And life happens. We just experienced a year where all of our plans that we had made, if nothing else, they needed to be revisited for the timing, and did they fit the circumstances. And we want to do that at least once a quarter, so we can do a course correction. That if we are not tracking to the goals that we had set for ourselves, or if we need to make some changes, because we have had new opportunities enter our business or our lives, that we can use our goals as a tool to move us forward.

Patricia: I used to sit with my staff, and every quarter, we would identify the goals for that quarter, and then who was responsible for carrying them out. And it was a great process because it required us to look at our priorities and our long-term vision. And it also had an element of accountability in it that, I think, at the beginning, the staff were a little bit of, “And why are you wanting us to identify this, Pat?” And then they got into it and enjoyed being able to measure their progress against the goals.

But sometimes, we had setbacks, as you've talked about, 2020 was a huge setback for people all over the world. I know, at least speaking for myself, and my husband will fully back this up, that I can get a little dogmatic about, “I want to do this, and I don't want anything to stand in my way.” We call it, in our family, the stubborn pigheaded Irish person syndrome. Tell us about dealing with setbacks.

Sheri: Setbacks are one of those things that we sometimes cross our fingers and hope won't happen. And yet, it's, as you mentioned, 2020 was the year filled with setbacks. And one of the first things that we have to do is to acknowledge that we had one, and to allow ourselves to feel the feelings that go with it. Because when we have a setback that completely takes us off track, there is emotion that goes with it. And until we acknowledge the emotion and to allow ourselves to say, “Yes, I'm disappointed. I'm sad. I'm angry,” we have little opportunity to fully get behind a new plan of action.

We were just talking about goals, and what happens when we have a setback, we want to take that time to relook at our goals, to relook at our long-term vision, to relook at what has been our operating

philosophy. Does it still apply? How do we have to make changes to it? And how do we have to reset our goals and move forward? And sometimes, there's even the conversation of is what we're doing still viable, and if it's not, then what? So, when we have a setback, there's an enormous amount that comes into it. And in many respects, it's kind of the trauma. And I'm sure your audience would appreciate this. It's the trauma that may happen when we are injured and there is a recovery period that we have to have, and we have to have a path of recovery from that.

Patricia: Yeah, there is a lot of trauma associated with what happened in 2020 and the ongoing changes as a result of the pandemic. There is a scrambling, in the legal world, to figure out how to continue to resolve cases with courthouses being closed. How do we settle cases if we're working with plaintiff attorneys, How do we help minimize how much has to be paid if we're working with the defense attorneys? The plaintiff attorneys cannot say, as one of my clients told me last week, "Well, I'll see you in court in two months." "Well, no, you won't be seeing me in court for two years."

If there's a tremendous backup of cases in the court system, criminal trials take priority, because our Constitution says that people have a right to a speedy trial. So that's a higher right than a medical malpractice or a personal injury case. There is a lot of scrambling going on. What have you observed among people who can handle setbacks successfully? Are there certain techniques or characteristics they have that enable them to get through those changes?

Sheri: I would say that there are several things. And some of it starts with appreciating that there are opportunities everywhere. It's that glass is half full perspective. It's in the looking for the opportunity. In some ways, it's very consistent with what I call an *attitude of gratitude*, of looking for the good that may be coming out of any action. There is always something positive, there is always something to be grateful for. And out of having that kind of an attitude, it then frees you up to focus positive energy on looking for solutions, looking for new ways of doing old things. And without that mental mindset of looking for new ways in changed circumstances, you're stuck. There have been a lot of very successful businesses that were created in an opportunity of a seemingly dire situation.

Patricia: One of the people who is part of my world is Jeffrey Hayzlett, who runs the C-Suite Network. And he said, there are some companies that are absolutely having a birthday party as a result of changes in our lives due to the pandemic.

Sheri: Yes. I'm a member of another networking industry, and the in-person events industry absolutely came to a standstill. But there have been, literally, millions and millions of dollars made by creative people who were able to come up with the wherewithal to create magnificent online events using the technology we have available today. It's just like we're speaking, we are, by no means, in the same city. We are almost halfway across the continent from one another. And there are ways, using technology, that we can move many situations, doing old work in new ways.

Patricia: I was talking to an attorney today who said that it's so much easier for him to go over diagnostic studies now with physician experts, because they can both look at the same screen, they can talk about it in real time. They don't have to be trying to connect on the phone or through email. They can both, simultaneously, discuss the findings. And that has made a big difference in his law practice.

Sheri: It has made a huge difference in productivity as well from the perspective of travel time. How much time did we spend going from Point A to Point B, and in the process of doing that the frustration level of dealing with the commute? That has become an opportunity. You were talking about dealing with setbacks. By not being in negative situations that are stressful, we free ourselves up to be more creative in how we are addressing our work, and to bring a more positive attitude, and have less burnout because of the stress.

Patricia: I know that you have a specific technique that you recommend, of using meditation to deal with some of these challenges. Can you focus us in a little bit on the benefits of meditation?

Sheri: Well, what I've discovered, and I had started my career in accounting and finance, which was always much like law and attorneys, that high action, high energy, go, go, go. But there are times when the situation or we, personally, because of our personal life, are highly stressed and our thinking is less clear. And by just even taking as few as maybe five minutes and finding a quiet place, and just doing some deep

breathing or connecting with our spiritual guide, our God or a higher power, and just even for a few minutes, changing our mental situation, that we can come back to what still might be a stressful conversation or deadline with a renewed energy and a clearer head.

Patricia: I talked to a person, today, who told me that she was heading into her doctor's office. And she perpetually has high blood pressure. And the doctor's nurse took her blood pressure and gave her the reading, and she said, "Just let me meditate for a couple of minutes." And her blood pressure came down.

Sheri: Yes, it happens. I've worked with clients who have called me, literally in tears, almost and not able to breathe, because they were in a situation in their work that had so upset them, and yet they knew they had to walk out their office door and act as if nothing were wrong. And we sat and we talked about, "Okay, just take a few deep breaths, a few deep breaths." And they were able to slow down, catch their breath, dry their tears, and walk out their door with their professional attitude and approach in place, and deal with the situation that had sent them off the edge. And no matter our profession, we all have those situations.

Patricia: Yes. I can think of several in my own life that happened on business time, and I had to recover from those situations.

Sheri: And sometimes, we don't have long to do that, especially if we're in charge, and we have a staff or other team members that are relying upon our clear-headed thinking, that we have to be able to step into the situation and move forward.

Patricia: Do you have any parting tips for our listener related to the topics that you've been covering? Some things that you say come to mind is, yes, this is something that you really should do for your business?

Sheri: I think we talked about setting a vision. Having a vision of where you're going is very important. Having your values, not only your business values, but your personal values allow you to make choices in ways that you might not have access to if you didn't have them in place. And to manage your business. And to really look at what it is that you want in your business, and what are the regular daily routines you can put in place to support yourself. Whether it's making certain

you're well rested, or you have appropriate exercise and a good diet, or it's having some fun and laughter to make all of the work you're doing worthwhile.

Patricia: I think when we talk about business development and marketing, the fun and the laughter piece tends to be overlooked, forgotten, not acknowledged. We're very serious. Legal nurse consultants work with very serious cases with people who can be catastrophically injured for the rest of their lives. And there's a lot of sad stories involved in the lawsuits when people get injured. There are, of course, some cases where people are trying to sue and they haven't been injured, but the legal system works hard to identify those cases and weed them out early on.

We're intense; we do a lot of concentrated work, where every word we say and every word we write can have significance. So, there's not a lot of fun and laughter part in our business. And I think it's great that you remind us that we need that to season some of the more intense work that we do.

Sheri: Yes, you have to have that counterbalance, especially when the work that you are doing requires a serious, concentrated focus. You have to be able to have things in your life that you're happy and grateful for to provide that balance.

Patricia: I agree. How can our listener find out more about you and the services that you offer, Sheri?

Sheri: Well, they can visit my website, thereinventionplaybook.com. And on my website, there is an opportunity to get a gift that I have, three steps to going from stuck to excited and fulfilled, and to find how to get in touch with me. So, it's thereinventionplaybook.com.

Patricia: All right, thereinventionplaybook.com. Perfect. And this is Pat Iyer, and I've been speaking with Sheri Berke about goals, visions, about meditation, about having some fun and laughter in your business, about the importance of having a clear sense of direction for your business and taking stock. And Sheri has recommended keeping those goals in mind and revisiting them every quarter. You can tell, from her accounting background, that she's very used to precise numbers and actions. Sometimes, we overlook those in our businesses, and we

can get so immersed in what we're doing that we don't look over the top of our monitor to think about what's ahead of us. So, keeping a focus on vision and goals is particularly important. Thank you, Sheri. I've enjoyed our conversation.

Sheri: It's been a pleasure.

Patricia: And I appreciate you, who's been watching this on our YouTube channel or coming to podcast.legalnursebusiness.com to see the show notes and to watch or listen to our files on our website. You can get the transcripts of Legal Nurse Podcast by going to podcast.legalnursebusiness.com and subscribing to our transcript service. We get every show transcribed so that you can go back and listen again or find information, or you can go and read without having to listen again, that's what I meant to say, and to be able to refer to the tips that our speaker shared in her podcast or his podcast. Be sure to come back next week for a new show, new topic, and tell other legal nurse consultants about the show so that they can enjoy *Legal Nurse Podcast* as well. Thank you so much.

Sheri: Thank you.