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ONBOARDING: 10 TIPS FOR SUCCESSFULLY INTEGRATING LATERALS INTO YOUR FIRM

by

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Onboarding: 10 Tips for Successfully Integrating Laterals Into Your Law Firm

Lateral hiring is an important aspect of the hiring market — and an investment. We've got tips for best practices for onboarding as well as tips for lateral partner integration.



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Navigating a new law firm without guidance can be daunting. Firms make significant investments in lateral hires, but they do not always follow through with organized integration plans.

"Laterals are sometimes a firm asset that is not really well thought out," says Executive Coach Debra Forman of Pinstripe Coaching. "I find that sometimes people don't do a strategic plan. There really should be a strategy when it comes to lateral onboarding."

In fact, Altman Weil's 2016 Law Firms in Transition found that one-third of respondents have a moderate to high level of concern about their firm's preparedness to deal with acquisition and integration of laterals. Yet nearly three-fourths of respondents to the same survey believe increased lateral movement will be a permanent trend going forward.

Indeed, the 2016 Client Advisory released by Citi Private Bank and Hildebrandt Consulting found that "[l]aw firms are aggressively pursuing laterals in targeted geographic or practice areas, either to fill gaps or provide deeper bench strength."

Given that lateral hiring is such an important aspect of today's legal hiring market, firms cannot risk being unprepared.

Given that lateral hiring is such an important aspect of today's legal hiring market, firms cannot risk being unprepared. This article offers best practices for lateral onboarding, as well as tips specific to lateral partner integration.

GENERAL TIPS FOR ONBOARDING LATERAL ATTORNEYS

An effective lateral integration strategy should begin early in the interview process and focus on building personal relationships and providing necessary training and resources. Below are best practices for tackling lateral onboarding of new associates and partners.

Get Personal: One of the most important aspects of onboarding is forging connections with the lateral attorney during the interview process and continuing these connections once the attorney begins at the firm.

According to the National Association for Law Placement's (NALP) *Lateral Hiring Best Practices Guide*, "The firm's commitment to the lateral should be continuously conveyed through personal communications, attention to timing issues, and follow-up."

For example, Jenner & Block tries to build a bridge for its lateral hires through firm connections. Lateral partners connect with numerous people, including current partners, office administrators and recruiting professionals. Likewise, lateral associates meet with a firm associate and a lateral orientation coordinator throughout the process.

Smaller law firms have the advantage of allowing everyone at the firm to meet a potential lateral, which can provide useful insight into whether the person will mesh with the culture.

"Like any other transition, moving to a new firm can be quite traumatic, especially for those who have been at their firms for a long time," says Charlotte Wager, Chief Talent Officer at Jenner & Block. "A lot of partners have been at their firms since they were summer associates, and with a move you're

essentially uprooting somebody. We assign somebody to work side-by-side with that candidate every step of the way. Candidates have expressed to us that this has made a difference in which firm they ultimately chose."

These connections should continue past the hiring process and early start days, says David Freeman, the Chief Executive Officer of David Freeman Consulting Group and Founder of Law Firm CultureShift.

"Have some sort of a process in place that reminds the leaders to do some checking in," says Freeman, who notes that laterals can easily feel forgotten once the wooing process is over. "It's a huge investment, and you want it to work."

Jenner & Block, for instance, offers a one-year transition program for lateral partners during which they engage in scheduled meetings with various partners and administrators. This structured process "creates multiple opportunities for laterals to ask questions all while creating buy-in throughout all levels of the firm," says Alexis Reed, Director of Lateral Partner Recruiting at the firm.

Host an Orientation: Firms should not assume that because attorneys are experienced, they don't need an introduction to the firm.

"There should always be some form of orientation, and that orientation should be broken down to understanding how the firm works, how billing works and how the practice area works," says Forman. "Every firm is going to be different, and you don't want someone assuming that what they learned somewhere else is easily transferable."

When it comes to lateral partners, however, firms also must be sensitive to their timing needs. Rather than blocking out a new partner's first few days with orientation, firms may consider scheduling the orientation over a week, giving the partner time to be in touch with clients and peers and to address their matters, says Reed.

Be Prepared: Firms should consider what tools attorneys will need to begin working and make sure they provide those resources from the start.

Given how big of an investment firms make in their partners and the benefits firms realize when partners succeed, it is particularly important that firms focus on lateral partner integration.

From day one, firms should ensure that all technological equipment and access to office supplies are available. Firms also should provide new lawyers with office locations and their phone numbers, as well as introduce them to their assistants and their practice group when they start, according to NALP's *Hiring Best Practices Guide*.

Also critical is setting up the laterals' email accounts, says Susan K. Sawyer, Legal Administrator at Tucker, Saltzman, Dyer & O'Connell, LLP, who advises having these accounts ready in advance of day one so attorneys can transition their communications and get their clients accustomed to the new email address right away.

Personal relationships are clearly an important aspect of successful onboarding, and a formal mentor provides an instant connection for questions and a liaison for meeting others.

Further, firms should provide laterals with information on the firm's billing and financial practices when they start, says Forman. "They want to be sure they can do a seamless transition and don't want there to be lag time," she says.

Include Current Attorneys: Crucial to lateral success are the attorneys who already work at the firm, with whom laterals will build connections, collaborate and work.

"It is such a fine balance," says Forman, who likens lateral hiring to the new toy analogy. "The laterals are like the new shiny toy that's coming in, but firms want to make sure that they don't throw away the old toys. There has to be a fine balance of paying attention to the old toys, too."

Forman advises firms to involve current attorneys in lateral hiring, giving them influence into who should be hired and accepting input into whether potential laterals fit the culture. And once laterals start, current attorneys should be involved in welcoming them to the firm.

Smaller law firms have the advantage of allowing everyone at the firm to meet a potential lateral, which can provide useful insight into whether the person will mesh with the culture.

"Usually when we're bringing in new attorneys or a partner, everybody has a chance to meet each other before final decisions are made," says Sawyer, who indicates that they follow the same process with staff hires. "The idea is they've made an investment in this person and that they will want to see them succeed."

Assign Mentors: Personal relationships are clearly an important aspect of successful onboarding, and a formal mentor provides an instant connection for questions and a liaison for meeting others.

For lateral associates, firms may take a cue from Jenner & Block and assign a former lateral as a mentor. "It is important for our firm to consider how the lateral is experiencing this transition," says Wager.

It may be more difficult to find partners with time to mentor lateral partners. Freeman suggests targeting those partners "who interviewed and fought for having this lateral come on board because they already have an interest in that person."

ADVICE FOR ONBOARDING LATERAL PARTNERS

In his November 2016 *Legal Management* column, "What's Hot and What's Not in the Legal Profession," Robert Denney notes that "[l]ateral hiring continues to be hot. While there are other reasons, the principal one is to increase revenues and, hopefully, profits. However, some statistics indicate that only about half of the lateral partner hirings achieve these objectives. One of the reasons is that ... [l]ateral integration all too often it is not adequately implemented."

Given how big of an investment firms make in their partners and the benefits firms realize when partners succeed, it is particularly important that firms focus on lateral partner integration. In addition to the above onboarding tips, firms should consider the following integration practices when shaping their strategies.

Be Ready for New Clients: It is no surprise that a lateral partner's prime concern is making sure the transition is smooth for clients. Obviously, the firm must conduct conflicts checks. But once clients are cleared, administrators must ensure they are placed into relevant firm systems so partners can work on matters from day one.

"The sooner a new partner is comfortable that client engagement letters are in place and bills are flowing smoothly, the more quickly they can feel comfortable continuing with the rest of their integration activities," states NALP's *Lateral Hiring Best Practices Guide*.

Cross-Sell: A useful way to build connections and bolster a firm's investment in a lateral partner is to cross-sell. "You want to cross-sell your laterals to the intaking firm and clients," says Forman. "That is a great way to really integrate the new laterals."

Through this technique, lateral partners can connect with lawyers across the firm, as well as meet current firm clients. This practice can also encourage lateral partners to cross-sell by introducing fellow partners to the clients they bring to the firm.

Track with Metrics: Metrics are another helpful tool in integrating lateral partners. At Jenner & Block, the lateral integration partner receives metrics on new partners each month.

"These numbers allow us to send a red flag or give a pat on the back," says Wager, who notes that while metrics are not the only indicators of success, they are an important aspect to consider and are eagerly sought by the laterals themselves. And this type of data furthers the personal connection by providing an excuse to have a conversation, says Wager.

Create a Marketing Plan: Firms should provide lateral partners with a clear set of expectations, including hours and compensation.

"One of the most important things is setting of expectations," says Freeman. "It's surprising to me how many laterals I coach who, when I ask them if they have a clear understanding of what's expected of them, say they don't."

Firm administrators should sit with lateral partners and create a marketing plan, which allows both the firm and the new partner to understand the other's expectations. "The marketing plan needs to have a level of specificity to it,"

says Freeman, who notes that this plan should give both the lateral and the firm goals.



Provide Business Development Training: While firms may hope that lateral partners are equipped with business development skills, some may not be equally prepared. For example, attorneys coming from in-house and government positions may have contacts but "still don't have systems and processes to nurture those into clients," says Freeman. Providing business development skills training and time to build a book of business is a great selling point in attracting laterals, he says.

SETTING UP FOR SUCCESS

Firms put a lot of resources into hiring laterals, so it makes sense to have a solid plan in place to help welcome them to their new job. The firms that make the transition the smoothest will have the most success. ■

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