

The Role of a Lateral Partner Integration Officer

The role of the Lateral Partner Integration Officer (“Integration Officer”) is to serve as the conduit between the law firm and the lateral partner, ensuring that the administrative, practice and cultural values of the firm are conveyed and that the transition to a new practice environment unfolds smoothly. To be successful, the Integration Officer should be able to form a collaborative relationship with the new partner with the common goal of achieving the business objectives of both the firm and the lateral partner that were identified prior to the lateral hire by the firm. Ideally, the Integration Officer is introduced to the lateral partner during the interview process so that a working relationship can begin early. It is during the interview process that integration commences as the lateral partner and firm partners identify opportunities presented by the potential addition of the lateral partner.

Integration is addressed in several stages which overlap each other:

- functional
- practice orientation
- social

The functional stage includes administrative and operational issues; the practice orientation stage includes practice issues; and the social stage includes firm participation such as practice group or committee involvement and attendance at firm functions.

1. The Functional Stage

Because it is a major life transition, the move to a new firm, however much desired, is always fraught with emotion. In the functional stage, the Integration Officer should be the primary contact between the lateral partner and the firm to ensure that the transition starts in a manner that instills confidence in the lateral partner that the decision to move was the right one . There are a multitude of small but important steps that need to be taken quickly and carefully, ranging from the lateral partner notifying his existing firm, to the actual move of information and belongings to the new firm. The Integration Officer must be proactive in explaining the steps that need to be taken in order to alleviate the lateral partner's anxious feelings and effect a seamless transition to the new firm.

The Integration Officer is also responsible for the delivery of a comprehensive orientation program for the lateral partner, ranging from firm billing practices to compliance policies to marketing and strategic plans. Because each lateral partner comes to a firm with a different set of issues,

the timing of this program is tailored to each person. Some partners arrive and immediately are engulfed in client work and other partners have more time to acclimate to the new firm. It is essential that the Integration Officer ensures the program is delivered in its entirety so that firm policies and processes are conveyed.

2. The Practice Orientation Stage

In addition to the functional aspect of a lateral partner's arrival at a new firm, there is a need to quickly and fully assimilate the lateral partner (and his practice) into the firm's practice – the practice orientation (or intellectual) stage. The Integration Officer, sponsor/mentor, practice group members, firm management and the lateral partner develop short-term and long-term objectives to meet this goal. The Integration Officer should ensure that the lateral partner receives information on the firm's existing practice, meets with partners in and out of his group, and meets with other practice groups to ensure that all viable cross-selling opportunities are identified. Because the success of lateral partners is often determined by initial momentum, it is critical that the Integration Officer monitor those activities and opportunities to ensure that action ideas are turned into actual action—such as client introductions—and are done expediently.

In addition to collaborating with the lateral partner, the Integration Officer keeps management apprised of the integration process. Regular reports would include numerical information such as current billable and non-billable hours, billings and collections and a comparison to expectations, and would also include a report on client introductions and pitches in which the lateral partner participated and other contributions to the firm. Through regular input from firm management, the lateral partner and Integration Officer are able to address any necessary changes to the short- and long-term goals that had been identified earlier in the process.

3. Social Stage

As the lateral partner becomes assimilated into his practice and the firm, the social stage of the integration should also be addressed. The Integration Officer must seek opportunities for the lateral partner to participate in firm committees, retreats and other activities that introduce the lateral partner to a broader group of partners. These types of activities are invaluable in conveying the culture of the firm. In addition, the Integration Officer must keep apprised of the satisfaction of the lateral partner, helping smooth issues that arise, ensuring that relationships are being fostered, and working with leaders in the firm to make sure the lateral partner feels like a valuable part of the firm.

There is no set time period for integrating a new partner into a firm. Each offers his own set of circumstances which require an Integration Officer to maintain flexibility in the program. Even when a lateral partner has become integrated into the firm, the Integration Officer frequently remains in regular contact because of the relationship that has been formed during the integration process. Flexibility is key in the position of Chief Integration Officer.