

Timing	Department or Title	Action	Status	Details
PRE-BOARDING				
Pre-Vote	Legal Recruiting (LR)	Confirm Due Diligence		LR confirms conflicts have been reviewed and cleared; LR confirms background check is in process and/or cleared and closed.
Pre-Vote	Legal Recruiting	Notify HR, Marketing and Conflicts		LR to notify HR of vote and probable new Lateral Partner; get employee ID; Notify Marketing.
Post-Vote	Legal Recruiting	Notify HR, Marketing and DoA		LR works with CTO, Department Head, Sponsor Partner and Integration Partner to determine start date.
Post-Vote	Legal Recruiting	Set Bill Rate		LR and CTO correspond with Department Head and COO re: standard bill rate for Lateral Partner.
PRE-BOARDING				
Before start date	Conflicts	Conflicts to review any incoming files		Conflicts to review potential matters and work on clearing conflicts, requesting waivers or establishing screens; conflicts to discuss engagement letters as well.
Before start date	Facilities	Determine office location		Facilities determines office location; any items/boxes/furniture to be moved, etc.
Before start date	Secretarial Services	Determine administrative assignment		Local office to provide LR name of administrative assistant.
Before start date	Telecom. Eng.	Determine phone number and email address		Local office to provide LR phone number and email address.
Before start date	IT	Partner selects handheld and computer		IT contacts Lateral Partner regarding selecting devices.

PRE-BOARDING				
Before start date		Order Business Cards		Local office to confirm with LR that business cards have been ordered.
Before start date		Add to visitor list		LR/DoA/Office Manager notifies visitor list of new partner's arrival date and time.
Before start date	Legal Recruiting	Send integration plan		LR sends Integration Plan to new Lateral Partner's legal secretary.
One day before start		Confirm office set-up		Local office to confirm set-up prior to Lateral Partner's start date.
Post-Announcement at current firm	Records	Discuss file transfer process		Records to discuss file transfer process -- electronic and hard copy and begin transfer process, when appropriate.
As early as possible		Professional photo taken		Local office to coordinate and confirm photo has been taken.
ON-BOARDING: First Day				
First day	HR	Photo for key card		If a professional photo has not yet been taken, Lateral Partner takes photo for key card.
First day	Integration Partner or Department Head	Greet Lateral Partner		Integration Partner or Department Head greets Lateral Partner upon arrival to the office on first day.
First day	Integration Partner	Lunch		Integration partner schedules lunch and could include Department Head, Practice Group Leader, etc.
First day	Legal Secretary	Initial meeting		Legal Secretary gives floor tour and completes service level agreement with new Lateral Partner.
First day	Partnership Acct Mgr. Fin. Serv. Admin Asst.	Partnership agreement		Accounting meets to discuss partnership accounting information (30 minutes)
First day	Human Resources	Benefits and HR forms		HR meets with new partner to review benefits and get HR forms completed. If forms are sent before, 15 minutes; if not, 60 minutes.
First day	Managing Partner	Announcement		MP sends announcement (prepared by Marketing) of new partner's arrival.
ON-BOARDING: First Week				

First week	ED/COO	Firm billing policies and financials		Lateral Partner learns about firm billing policies, financials, etc. (60 minutes)
First week	Client Accounting	Billing processes		Lateral Partner learns about billing processes. (30 minutes)
First week	Dir. Of Conflict Services	Conflict services		Conflicts reviews matters coming into the firm and discusses staffing needs, engagement letters, conflicts procedure and any other intake issues. (30 minutes)
First week	IT	Upload Contacts		IT contacts Lateral Partner about uploading the new Lateral Partner's contacts.
First week	IT	Technology training		IT conducts technology training, PDA training, telephone, etc. (60 minutes)
First week	Marketing	Marketing Introduction		Marketing discusses business plan and any other imperative, initial marketing activities. (30 minutes)
First week	Library and Information Services	Library services		Library professional discusses library services. (15 minutes)
First week	Professional Development	CLE overview and evaluation process		Lateral Partner learns about CLE Overview including compliance dates and attorney responsibility. The evaluation process update includes the timing and expectations. (30 minutes)
First week	Docketing	Docketing		Lateral Partner learns about the docketing process. (30 minutes)
First week	Paralegal Services	Paralegal services		Lateral Partner learns about paralegal services at the firm. (15 to 30 minutes)

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4	Post-Vote	Legal Recruiting	Set Bill Rate		LR and CTO correspond with Department Head and COO re: standard bill rate for Lateral Partner.
	PRE-BOARDING				
6	Before start date	Legal Recruiting All offices	Create lateral integration plan		LR to create lateral integration plan.
7	Before start date	Legal Recruiting All offices	Populate lateral integration plan		LR to schedule meetings that should take place during the first few weeks with the firm; send outlook invitations to individuals, new Lateral Partner and new Lateral Partner's legal secretary, as necessary. (Local offices to lead orientation scheduling)
8	Before start date	Conflicts	Conflicts to review any incoming files		Conflicts to review potential matters and work on clearing conflicts, requesting waivers or establishing screens; conflicts to discuss engagement letters as well.
9	Before start date	Department Head, Practice Group Lead	Discussion regarding portable matters		Department Head or Practice Group Lead to review with Lateral Partner new matters porting to the firm, discuss staffing needs and address any other intake matters.
10	Before start date	Marketing	Prepare draft announcements		Marketing prepares draft announcements, press releases, web site bio, marketing plan for implementation; Marketing also prepares draft internal firm announcement from Managing Partner.
11	Before start date	Marketing	Introductory meeting		Intro meeting between new Lateral Partner, communications and BD resources from Marketing to review communications and BD plan.
12	Before start date	Chief Talent Officer	Identify "Integration Partner"		LR works with CTO to identify the Integration Partner, who will lead Lateral Partner's integration, development, help with questions, etc.
13	Before start date	Legal Recruiting	Arrange Planning Call		LR to arrange meeting or conference call with Integration Partner, Bus. Dev. Mgr., Chief Talent Officer, LR and Office Manager to take place after Lateral Partner has joined the firm.

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14 Before start date	Legal Recruiting	Share integration plan		LR emails the integration plan to the call/meeting participants prior to the meeting or conference call.
ON-BOARDING: First Day				
15 First day	Integration Partner or Practice Group Lead/ Dept. Head	Greet Lateral Partner		Integration Partner or Department Head greets Lateral Partner upon arrival to the office on first day.
16 First day	Integration Partner	Lunch		Integration partner schedules lunch and could include Department Head, Practice Group Leader, etc.
17 First day	Managing Partner	Announcement		MP sends announcement (prepared by Marketing) of new partner's arrival.
ON-BOARDING: First Week				
18 First week	Integration Partner	Introductions		Integration Partner facilitates introductions with lawyers and staff in Department/Practice Group.
19 First week	Marketing	Marketing introduction/Orientation		Marketing discusses JennerNet, communication plan, business plan and any other initial marketing activities, including uploading contacts into Interaction. (30 minutes)
20 First week	Legal Recruiting	Planning Call		Marketing schedules second week meeting with Bus. Dev. Mgr. and meeting with Practice Group Lead/Department Head re: business plan.
21 First two weeks	Legal Recruiting	Introductory Memo		Conference call with Lateral Partner, Integration Partner, Bus. Dev. Mgr., Chief Talent Officer, LR and Office Manager (if outside Chicago) to outline deployment and top client initiatives.
INTEGRATION				
23 Second week	Practice Group Lead/ Dept. Head, Integration Partner and Marketing	Discuss individual marketing and business development plan		LR sends memo to all department heads and practice groups leaders introducing the new partner and encouraging outreach, copying CTO.
				All discuss individual marketing and business development plans and practice group or department plan, identify goals and timeline and discuss deployment on active Jenner matters.

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24 Second week	Firm Counsel Chief Talent Officer	Discussion loss prevention protocols, key policies and talent acquisition, utilization and development		LR schedules discussion with firm counsel and CTO to include loss prevention protocols, key policies, billing rates, staffing, alumni, recruiting and attorney development
25 Within first month	Marketing	Cross-selling and visibility		Marketing should work with the Lateral Partner to: 1. Identify relationship partners for Jenner clients Lateral Partner should meet; 2. Facilitate meetings for Department Head and Lateral Partner with other department heads or practice area leads to identify cross-selling opportunities; 3. Discuss Lateral Partner's visits to other offices in person or connection by video to identify cross-collaboration opportunities; and 4. Create opportunities for firm to meet Lateral Partner's clients.
26 Within first two months	Legal Recruiting	Presentation for Partners' Meeting		Communications matters, like speaking engagements and media relations to be discussed as appropriate. LR follows up with CTO regarding scheduling presentation by Lateral Partner for Partners' Meeting
27 Within first two months	Legal Recruiting	Legal Recruiting		Within the first two months, LR meets with new partner to 1) gather feedback on the new Lateral Partner's recruiting and integration experience; 2) discuss firm's recruiting efforts; and 3) ask new Lateral Partner to be a part of the firm's recruiting efforts
28 First quarter	Diversity & Inclusion	Diversity and inclusion		In month 2, LR sends email to Jami asking her to schedule discussion of firm's diversity and inclusion initiatives, affinity groups and possible involvement with Lateral Partner.
29 First quarter	Marketing	Q1 Check-in re: cross-selling and visibility		Check-in and update to Practice Group Lead/ Dept. Head, Integration Partner, CTO, LR and CMO re: status of cross-selling and visibility initiatives.
30 Third month	Practice Group Lead/ Dept. Head	3 Month Check-in		LR to contact Department Head regarding 3 month check-in with Lateral Partner regarding transition, expectations (both the new Lateral Partner's and the firm's) and goals/milestones, possibly over lunch or dinner; LR to send Department Head 3 month stats on billables, etc. for discussion.

Timing	Department or Title	Action	Status	Details
31 Third month	Marketing - CMO	3 Month Check-in		CMO to check-in with Lateral Partner re: progress on cross-selling and visibility.
INTEGRATION				
32 Second Quarter	Marketing	Q2 Check-in re: cross-selling and visibility		Check-in and update to Practice Group Lead/ Dept. Head, Integration Partner, CTO, LR and CMO re: status of cross-selling and visibility initiatives.
33 Sixth month	Practice Group Lead/ Dept. Head and Managing Partner	6 Month status review		LR to facilitate scheduling six month status review meeting with Lateral Partner to review of transition, expectations (both the Lateral Partner's and the firm's) and goals/milestones
34 Sixth month	Practice Group Lead/ Dept. Head	Committee Involvement		Lateral Partner to review active firm committees and determine possibility of involvement. Lateral Partner to meet with chairs of committees of interest.
35 Third Quarter	Marketing	Q3 Check-in re: cross-selling and visibility		Check-in and update to Practice Group Lead/ Dept. Head, Integration Partner, CTO, LR and CMO re: status of cross-selling and visibility initiatives.
36 Ninth month	Practice Group Lead/ Dept. Head	9 Month status review		LR to facilitate scheduling informal review with Lateral Partner of transition, expectations (both the new Lateral Partner's and the firm's) and goals/milestones, possibly over lunch or dinner.
37 Ninth month	Marketing - CMO	9 Month Check-in		CMO to check-in with Lateral Partner re: progress on cross-selling and visibility.
38 Fourth Quarter	Marketing	Q4 Check-in re: cross-selling and visibility		Check-in and update to Practice Group Lead/ Dept. Head, Integration Partner, CTO, LR and CMO re: status of cross-selling and visibility initiatives.
39 First year anniversary	Managing Partner	12 Month status review		LR to facilitate scheduling a meeting to review expectations and goals of the past year and upcoming year (both the new Lateral Partner's and the firm's).
INTEGRATION				
40 After 12 Months	Professional Development, with Practice Group Lead/ Dept. Head	Professional Development and Business Development Check-in		After 12 months, discuss with Lateral Partner development, coaching and mentoring. Assess lateral's ability and comfort with becoming a formal mentor and sponsor for additional lateral partner hires.
41 After 12 Months	Legal Recruiting	Recruiting Check-in		After 12 months, meet with Lateral Partner to gather opinions on recruiting and integration efforts.

Lateral Partner Integration Plan

Partner Name, Practice Group/Department: _____
Integration Partner: _____

Start Date: _____

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	42 After 12 Months	Managing Partner and Practice Group Lead/ Dept. Head Continued Integration		After 12 months, determine need for further integration efforts, i.e. additional client introductions, revisions of business plan, etc.