

Onboarding and Integration Checklist

Communications/Public Relations

- ☐ Arrival announcement
- ☐ Press interviews
- ☐ Media training

Administrative

- ☐ Office assignment (share photos of office space and common areas while office is remote)
- ☐ Assistant assignment and introduction
- ☐ Phone number
- ☐ Business Cards
- ☐ Professional Photo
- ☐ Moving of items to new firm
- ☐ Billing
- ☐ Time entry/Expenses
- ☐ Name added to relevant office/practice group/area/industry sector distribution lists
- ☐ Benefits
- ☐ Human resources information — how non-attorney staff operate and their responsibilities, employment policies, hours of operation, emergency contacts, office perks
- ☐ Local office welcome/office specifics

Technology

- ☐ Computer and Mobile Devices
- ☐ IT Training
- ☐ Outlook and contact transfers from prior firm's device
- ☐ Document Management Systems/Electronic Transfers/Software needs

Conflicts

- ☐ Records/Information management - transferring of files
- ☐ Opening matters – clearance of any new matters not previously cleared prior to acceptance
- ☐ Introduction to General Counsel's office

Financial

- ☐ Management and structure of the firm and individual offices
- ☐ Firm's strategic plan (provide the firm's vision statement if available)
- ☐ Firm economics (factors affecting profitability, how the firm calculates utilization and realization rates, and policies and procedures related to non-billable time, inputting time, and billing and collections)
- ☐ Policies and procedures related to CLE and professional seminars, payment of bar dues, professional licensing fees, and requesting reimbursements from the firm
- ☐ Associate compensation, bonuses, and partnership evaluation

Marketing and Business Development

- ☐ Practice/Sector meetings
- ☐ Client introductions
- ☐ Individual attorney meetings
- ☐ Pitches
- ☐ Internal and external profile raising opportunities

Diversity & Inclusion

- ☐ Overview of commitments and aspirations of the firm and expectations of firm lawyers and staff

Pro Bono

- ☐ Overview of commitments and aspirations of the firm and expectations of firm lawyers and staff

Practice Support

- ☐ Legal Assistants
- ☐ Legal Project Managers

Professional Development and Training

- ☐ Internal training programs
- ☐ External training programs
- ☐ Coaching (business development)