

NALP Annual Education Conference 2021
The Honeymoon is Over: Ensuring a Lateral's Long-Term Success

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One important factor in ensuring a lateral's success is a well-developed integration plan that goes beyond initial introductions. An integration plan sets forth clear goals and milestones for new attorneys and helps your firm correct any issues if they arise.

We've put together a couple of sample integration plans for partner-level and associate-level hires. These are basic starting points, acknowledging that each firm will have their own needs.

Integration Goals

- Demonstrate the Firm's commitment to attorney success through regular interaction with the members of attorney's department and practice group, ongoing review of utilization and work assignments, timely feedback and periodic status meetings, and guidance on navigating the firm's resources.
- Accelerate integration and reduce ramp up time in three key areas: Firm, work and community. A formal integration will help the attorney to:
 - understand the Firm and how things work at a Firm level;
 - understand the work and how to succeed at a Practice Group level; and
 - build relationships, expand their network and integrate into the Firm community.

Measurement of Success

Designated member of professional development team will check in with the attorney weekly, then monthly, to create accountability.

Sample Lateral Integration Plan

Two Weeks Prior to Start Date

- Schedule a welcome and onboarding call to introduce key leadership in marketing, technology, etc.

One Week Prior to Start Date

- Internal announcement regarding new arrival
- **Check-in:** Check-in meeting with lateral and key leadership & departments

Week 1

- **Marketing:** Press release
- **Marketing:** Post bio to website
- **Marketing:** Send client alert
- **Lunch:** Welcome and introductory lunch
- **Training/Admin:** Firm policies

Week 2

- Check in with legal assistant

Week 3

- **Marketing:** Completed business plan
- **Lunch:** Lunch with advisor
- **Training/Admin:** Training re: pricing and billing

One Month Post

- **Marketing:** Introduction to practice group meetings
- **Marketing:** Review completed business plan and set budget and implementation goals
- **Marketing:** Identify cross-selling opportunities for existing clients
- **Marketing:** Introduce lateral via local/national media outlets
- **Check-in:** Coffee/lunch with Managing Partner

Two Months Post

- **Marketing:** Continue introduction to practice group meetings
- **Marketing:** Identify opportunities for honors and awards for the lateral
- **Marketing:** Set networking plan – speaking engagements, associations, etc.
- **Lunch:** Lunch with Practice Group Leader
- Introduction at partner meeting

Ongoing

- **Marketing:** Continue introduction to practice group meetings
- **Lunch:** Set lunches with key departments, leadership, recent laterals on a monthly basis
- **Training/Admin:** Business development trainings
- Assign to committees
- Invite partner to a summer associate event prior to the formal invitation

Six Months Post

- Review networking plan
- Review business plan

One-Year

- Review ROI

Other items to consider

- In a virtual environment, new attorneys may need extensive training on remote work tools
- Create an integration team of attorney mentors, peers, and administration to check-in with the attorney
- Create a “cheat sheet” with names and contact information for key departments so attorneys know who to contact when they need help

Lateral Partner Integration Program

- *The Business Development team partners with lateral, Practice Management and PGL/Sponsor Partner(s) to ensure smooth transition into the firm*
- *Map opportunities and meet regularly to integrate new partner through internal introductions and introductions to firm contacts and clients*
- *Select the best program for each lateral (formal vs. lite) and identify a Sponsor Partner(s):*

