

The Leader's Role In Integrating Laterals

QUESTION:

Like many firms, we seem to have been more active, recently, in attracting talented laterals to our firm. I read an article that stated "law firm management must take a proactive and strategic role in planning the firm's partner integration efforts." So, as a brand new firm leader, what specific actions would you recommend I take responsibility for, in helping orientate and integrate these new lawyers?

RESPONSE:

Your question asks about the Managing Partner's roles and responsibilities for effective integration of lateral lawyers into the firm. We identify a number of areas where the Managing Partner should have responsibility.

First, the Managing Partner should assure that the firm has an effective recruiting process for laterals. There are multiple dimensions that should be addressed here, including:

A. Assure that the recruiting process is designed to enable the firm to learn as much as possible about the lateral candidate. Because of constraints imposed by the confidentiality of many recruiting efforts, effective due diligence about lateral candidates often is difficult. Accordingly, the firm should strive to be creative and thorough in developing information about the lateral candidate. Google searches, searches of court and bar records, and background checks are among the resources available. Develop a lateral recruiting checklist to assure that someone in the firm is responsible for obtaining desired information from/about the lateral candidate.

B. Be alert for clues that the candidate provides about his/her values and interests during the recruiting process. One member of the LAB believes that he can learn much about the lateral candidate during the recruiting process and in negotiating the "deal" with her/him. This is akin to the notion that people reveal their true selves on the playing field. Many lawyers reveal their true selves at the negotiating table.

C. Assure that your firm's recruiting process accurately portrays the firm's values and culture to lateral candidates and that candidates who do not mesh with the firm's culture and values are screened by the recruiting process. Unless this happens, no amount of integration will be effective. As one member of the LAB put it, "integration won't turn pepper into salt or vinegar into sugar." The firm's approach to setting compensation is one critical element of the firm's culture with which the lateral candidate should become thoroughly acquainted during the recruiting process. In sum, assure that the recruiting process is oriented toward achieving alignment between the firm and the lateral candidate on the firm's approach to compensation and its culture and values.

D. Because many laterals consider changing firms for a “platform” at the new firm that appears to offer better professional opportunities, assure that the firm’s recruiting process accurately conveys to the lateral candidate what the firm’s “platform” is and that the firm doesn’t overpromise its capabilities. Doing so will help to avoid disappointments after the lateral joins the firm. Once the lateral is at the firm, look for ways to demonstrate to the newcomer how the firm’s strengths can contribute to creating the opportunities that motivated the lateral’s move to the firm.

Second, the Managing Partners should assure that the firm has a thoughtful integration plan/process (preferably in writing) for lateral lawyers, that the plan/process is properly led and staffed by individuals at the firm who will be accountable for successful lateral integration, and that the plan/process for integration is effectively implemented.

We identify several elements in an effective integration plan/process, including:

- Integrate the lateral into the firm through cross-staffing and cross-selling. Encourage the newcomer’s practice group to meet with the lateral early in her/his tenure with the firm to identify the existing matters to which the newcomer might be assigned and the existing clients of the firm who might benefit from an introduction to the newcomer. Focus first on what the practice group and the firm can do for the lateral and later on what the lateral can do for the firm by cross-selling clients that she/he brought to the firm for additional services from the firm.
- Ask the newcomer to prepare a detailed business plan for her/his practice at the firm. The plan should have both short- and long-term dimensions. The first 100 days at the firm are critical and could determine whether the new lawyer will succeed there, so insist that the plan be as specific as possible about what the lawyer intends to do and what the lawyer will need from the firm during that period.
- Integrate the lateral’s employees (legal assistants, associates, staff, etc.) into the firm’s work for existing clients of the firm, introduce them to others in the firm, and acquaint them with the firm’s culture.
- Introduce the lateral to the firm’s governance structures by inviting her/him to participate in the work of firm committees and boards.
- Encourage the people of the firm to include the lateral in social functions and to begin building friendships with the newcomer.
- Involve the lateral’s spouse and family in firm activities. How a lawyer’s spouse feels about the firm, especially during the early days of the relationship, could have profound effects on how the lawyer will feel about the firm down the road and how tolerant the spouse will be about the long hours that the lawyer will devote to building her/his practice at the firm.

- Assign a current partner at the firm to mentor or coach the new lawyer. This partner should have responsibility for assisting in the lateral's integration into the firm and for monitoring her/his progress at the firm, especially during the critical first 100 days of the lateral's tenure with the firm. The mentor/coach should be held accountable for effective integration of the lateral and should report periodically to the person in the firm responsible for lateral integration.
- Don't overlook the mundane, including such matters as licensure. It is important to know where the lateral is licensed, where she/he needs to be licensed, what she/he can do until licensed.
- Take a personal role in the integration by (1) helping to introduce the lateral to key elements of the firm's culture; (2) explaining to the lateral how the firm's compensation system is intended to work, including what is expected of lawyers at the firm in terms of their performance and participation in the compensation process; (3) assisting the lateral with "connectivity," *ie.* with whom at the firm should the lateral "connect" on client, firm, and administrative matters; and (4) meeting personally with the lateral from time to time to assess her/his progress, to hear her/his observations about the firm and to learn from the lateral what improvements the firm might consider making based on the lateral's experiences before coming to the firm.

Third, understand that all laterals carry some risk and that effective recruiting and integration programs are desirable to manage this risk.

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The LAB was formed as a resource to provide pragmatic advice to assist new managing partners with their critical burning issues and help them succeed. **The LAB** is comprised of the following distinguished current and former law firm leaders: Angelo Arcadipane (Dickstein Shapiro LLP); John Bouma (Snell & Wilmer LLP); Brian K. Burke (Baker & Daniels LLP); Ben F. Johnson, III (Alston & Bird LLP); Keith B. Simmons (Bass Berry & Sims PLC); William J. Strickland (McGuire Woods LLP); Harry P. Trueheart, III (Nixon Peabody LLP); R. Thomas Stanton (Squire Sanders); Robert M. Granatstein (Blake Cassels and Graydon) together with Patrick J. McKenna