Lateral Integration for Longevity

Julie M. Mulhern

In law firms, lateral integration is a marriage of many resources. I am sure many remember the famous quote "it takes a village." In the case of lateral integration, this quote is spot on for law firms in a competitive market. Recruiting, marketing, professional development, and human resources all play a significant role in an effective onboarding program.

Onboarding Laterals

Onboarding the lateral should be a well-thought-out process. Before you bring any laterals through the door for their first day of work, consider discussing your current process and evaluating ways to improve and engage the prospective lateral immediately. Organize a meeting of all principal administrative department heads to discuss the onboarding and orientation process. The purpose of the meeting should be to assign tasks and accomplish as much as possible before each lateral's first day of work. Discuss everything from file transfers, conflicts, business cards, technology needs, and the orientation schedule. Consider including the secretary assigned to your new lateral to assist the onboarding team. The secretary should be able to identify meetings and client obligations in advance to help minimize conflicting demands in the first week.

Prior to finalizing the orientation schedule, consider inviting the lateral (via a conference call) to help review the schedule and meet the onboarding team. Ask the lateral what she would like to accomplish in the first days on the job. Inviting the lateral to participate in the onboarding process reflects the firm's regard for the lateral and her work while reaffirming her clients as a top priority.

Another way to determine the lateral's needs is by conducting a pre-hire survey. Determine the level of her technology experience[1] and plan accordingly for any additional hardware or software needs. All of this information should be utilized to streamline the actual orientation schedule.

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[1] See the July 17, 2013 *ABA Journal* post by D. Casey Flaherty, Corporate Counsel of Kia Motors America, "Could you pass this in-house counsel's tech test?" www.abajournal.com/legalrebels/article/could_you_pass_this_in-house_counsels_tech_test

Integrating Laterals

Once the orientation phase is complete and the hoopla of joining the firm has settled, the real work begins. Again with the "it takes a village" concept in mind, integrate your partners, associates, and administrators into the lateral's progress. Consider engaging your associates to act as ambassadors during this period. At Benesch we utilize practice group ambassadors to ensure that laterals are invited to a monthly practice group business lunch. New laterals are introduced at the meeting and learn of practice activity as well as how they can act as an immediate resource. An added bonus: the lateral may also be able to assist with building or increasing prospective client opportunities based on their existing contacts.

Professional Development takes over after the onboarding and orientation process via monthly meetings over the lateral's first year. These meetings are brief and straightforward to keep from overwhelming an already busy schedule. Use a checklist to steer the conversations, answer questions, and identify additional resources needed by the lateral.

Similarly, Marketing/Business Development meets with the lateral on a regular basis in the first year to develop work profiles, business plans, and conference plans and to identify training and/or coaching opportunities. These monthly conversations reveal what the lateral is discovering about the firm (the good, the bad, or the ugly) and provide an opportunity to discuss his understanding of the firm. These meetings should also be used to watch for red flags. Is the lateral participating in training, and firm events? What are his experiences with work flow, feedback, participation in pitches, and so on?

Additionally, consider peer mentoring for more senior laterals and partners. Mentoring is an effective tool in educating the lateral on firm politics and business protocols.

Helping Laterals Contribute to the Firm

As with any business investment, you must monitor the analytics and look beyond billable hours. Firms should review business/client development activity and expenses, new matter in-take activity, fee collection averages, write-offs, and the like to establish performance expectations for the lateral. If the lateral is bringing a book of business with her, discuss realistic expectations on when those numbers will show up. We found that it takes a lateral approximately three years to be profitable. Knowing this kind of time frame will allow for an honest, fair, and frank discussion about performance metrics and evaluations at the appropriate time. Do not keep laterals in the dark. Walk them through the timeline of these events, forms, and supporting written materials to help them understand your process and procedures.

Last but not least, report all of this information to the leadership of each lateral's practice group. We use a quarterly reporting system that includes commentary, requests, and issues identified during the monthly P.D. meetings. The reports provide department leadership with opportunities to engage the lateral on direct issues. They are also valuable in spotting potential issues and avoiding frustration for all involved.

The process we have created at Benesch allows us to engage our laterals in the earliest phase of employment. The process also conveys our commitment to both their success and the success of our firm. We want our laterals not only to understand but also to participate in "My Benesch, My Team"!

Julie M. Mulhern *serves as Benesch's Director of Professional Development. She brings more than 20 years of legal industry experience to her post. Ms. Mulhern has firm-wide responsibility for planning and implementing professional development tactics for over 170 attorneys. She oversees attorney orientation, training, Continuing Legal Education, networking, mentoring programs, and alumni programs. She can be reached at jmulhern@beneschlaw.com or 216-363-4482.*