
GARRISON & SISSON

WASHINGTON, DC

Lateral Partner Questionnaire (LPQ) Audit Checklist

The LPQ is a critical part of the lateral partner recruiting process for both the law firm and the lateral partner candidate. This checklist is not intended to be a comprehensive summary of all LPQ elements; rather, the following is offered to assist you and your firm in evaluating whether your existing LPQ captures the key information in the most effective, efficient, and user-friendly manner.

Timing of Requested Information	✓
Is the amount of information we are requesting at this stage of the process appropriate?	
Should we have a two-part LPQ, the first requesting only minimal information sufficient to progress to the next stage of discussions/consideration (e.g., top 10 clients for conflicts checking, total revenue generation over the past three years, billing rates, projected portable business)?	

Technology Issues	✓
Is the LPQ in Word (not PDF)?	
Can certain sections of the Word document be modified to include additional space if needed (e.g., extra rows or tables)?	

Ethical Issues	✓
Have we provided disclaimer language advising partners not to include information that would violate client confidences or duties owed to their current firm?	
Are we in agreement with the candidate regarding when references will be checked and which references will be contacted?	

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655 15th Street NW, Suite 820 • Washington, DC 20005

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Tone of the LPQ	✓
Does our LPQ provide an introduction that sets the tone and provides detailed instructions?	
Does the LPQ focus only on portable business (“what can you do for me?”), or does the LPQ also include candidate-focused questions (e.g., “what are the resources you need to support your practice”)?	
Does the LPQ invite an opportunity for the candidate to identify synergies with the firm’s client base and his/her expertise?	
Regarding sensitive issues (e.g., compensation), are we making sure that the LPQ is a venue—but not the first or only venue—used to discuss compensation expectations and our system, generally?	
Does the LPQ indicate that it is a confidential document and will be treated as such?	

Definitions of Key Terms

Have we defined key terms to avoid ambiguity? For example:

“Chargeable Hours”

- What does “chargeable” mean?
- Is this work that was billed, or work that was collected?
- Is it work you did for your client?
- Work you did for others’ clients?
- Work others did for your clients?

“Portable Business”

- What does “portable” exactly mean? Within the first 12 months?
- Are other attorneys required to service this work? If so, provide details.
- Does the portable business question provide a chart where each client can be listed separately with portable business estimates (minimum, reasonable, optimistic) for each client?
- Do we ask the partner to rate the likelihood of portability of each client, which will provide us with a better idea of the actual portability?

“Origination”

- Is this referring to work that the partner solely brought to the firm, or does it also encompass work that was brought in due to a joint effort?
- Does it include expansion of business for existing clients not otherwise controlled by

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the partner?

- Does the LPQ ask the partner to explain how origination is defined at his/her current firm? Is credit divided between two or more partners for the same client matter and work production?

“Billing Credit”

- What does this mean to our firm?
- What does it mean to the candidate’s existing firm?
- Does it differ from origination?

“Collections”

- Does this refer to collections on the partner’s billable time?
- Is it limited to collections from the partner’s own clients?

“Compensation”

- Does our LPQ request estimated annual total compensation, draw and bonus?
- Do we ask about retirement plan vesting and contributions, which may be very relevant?
- Request timing of payout at current firm for prior year’s final distribution and/or bonus.

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