Partner Name:

Start Date:

Lateral Partner Integration Checklist

Liaison Name: ___________________

Step	Owner/Single Point of Contact for Coordination	Lateral Partner Orientation/Integration Activities	Timing/When	Completed Y/N	Comments
1	Recruiter	Lateral Partner accepts offer.	Before Arrival		Liaison Coordinator consults with the Practice Group Chair / Champion(s) to identify Liaison.
2	Recruiter	Schedule the Liaison orientation meeting with the Liaison Partner.	Before Arrival		
3	Liaison	Liaison is introduced to Lateral Partner. Lateral Partner shares client list with Liaison, if appropriate. Liaison sends Lateral Partner the list of current clients in the practice group and office he/she is joining. Liaison shares list with BDC for the practice group to best coordinate interaction among Lateral Partner and CRLs of clients and prospects where there is overlap. If there is overlap, the Liaison (or the BDC, whichever is appropriate,) reaches out to the CRL partners of those clients and informs CRL partner of Lateral Partner's imminent arrival, and details on how the Lateral Partner knows that client. Liaison solicits from the Lateral Partner what type of non-obvious clients they have helped in the past and then find similar clients in the (FIRM) roster.	Before Arrival		
4	Marketing	Marketing prepares the Press Release and website bio. Business Planning Assistant writes an introductory announcement which is shared internally and with selected clients, if appropriate. Liaison reviews list of firm clients who should receive the introductory announcement/Press Release because there may be some less obvious clients who should receive the press release.	Before Arrival		
5	Liaison	**Lateral Partner joins (FIRM).** Liaison has lunch with Lateral Partner on the first day, if possible.	Day One		
6	Liaison	Liaison personally introduces Lateral Partner to CRL's in their office and schedules an email/phone call for those CRL's in other offices. (Continuation of Step 3 above.)	Week One		

Partner Name:

Start Date:

Lateral Partner Integration Checklist

Liaison Name: ___________________

Step	Owner/Single Point of Contact for Coordination	Lateral Partner Orientation/Integration Activities	Timing/When	Completed Y/N	Comments
7	Liaison and Practice Group Chair	Progress Reports: Liaison meets with Lateral Partner and reports back to Liaison Coordinator, NPG Chair and PGOO at the end of one month, three months, and six months. (If CRL's have not been responsive, the Liaison will follow-up with more urgency.) Liaison prepares a report to the NPG Chair, PGOO, Liaison Coordinator and Practice Group BDC after each of those meetings.	On-Going		Ensure the Practice Group Chair is fully aware of the integration efforts.
	CRL - Client Relationship Lawyer **BDC: Business Development Consultant** **NPG: National Practice Group** **PGOO: Practice Group Operating Officer**				