

WEDNESDAY 10:00am "Winning the War On Talent"

LATERAL HIRING CHECKLIST

Practice Area: _____ Office: _____

Project Start Date: _____ Hire Date: _____

LATERAL HIRING STEP	DATE/RECRUITER'S INITIALS
<i>Getting Started and Initiating the Search</i>	
Identify need (Evaluate work and level)	
Obtain required approval to initiate search	
Draft job posting and identify key skill set	
Identify alternative sourcing methods (websites, bar assoc, alumni, etc)	
Identify search firms and external recruiters to work on search	
<i>Pre-Interview</i>	
Confirm candidate is in Applicant Tracking System and if there is a history on the candidate	
If through recruiter, insure fee agreement is in place	
Confirm application documents needed to move to the interview stage have been received (ex: resume, transcript, writing sample, deal sheets, conflicts forms, all due diligence)	
Confirm state bar membership and identify if any license discipline	
Start the conflict process	
<i>Interview</i>	
Work with firm stakeholders to determine who <i>must</i> interview candidate	
Schedule interviews and appropriate conference rooms	
Send confirmation email with appropriate firm information	
Send reminder email to interviewers with candidate's information	
<i>Post Interview</i>	
Collect evaluation/feedback forms	
Compile feedback	
Discuss/email hiring partner to determine if moving forward	
Obtain application documents needed to move to the next recruitment stage, if applicable	

If obtaining additional documents, determine if hiring partner needs to review before moving forward; if so, schedule review	
If needed, schedule another round of interviews, following Interview and Post Interview steps	
If needed, close candidate, following firm protocol	
<i>Pre Offer</i>	
Confirm due diligence is complete and all questions have been answered	
Confirm conflicts have cleared and closed	
Confirm terms of offer (class year, salary, bonus and bonus eligibility requirements, relocation, bill rate, draw, billable hours requirement)	
If applicable, draft offer letter or term sheet and receive appropriate approval	
Determine who will extend offer, if applicable	
<i>Offer and Post Offer</i>	
Extend Offer, if applicable	
Hold transition call with lateral attorney	
Follow all firm procedures for turning new attorney over to HR for onboarding and integration	

Prior to beginning the process, make sure you are familiar with all employment laws that may affect your recruitment, including but not limited to, Ban the Box, Salary History Ban, and EEOC regulations. Contact your firm's labor GC for any needed counsel.

LATERAL PARTNER HIRING & INTEGRATION CHECKLIST

Practice Area: _____ Office: _____

Project Start Date: _____

LATERAL HIRING STEP	DATE/RECRUITER'S INITIALS
<i>Getting Started and Initiating the Search</i>	
Identify need	
Identify Search Firm	
Agree on terms with Search Firm/Execute Agreement	
Pay Retainer	
Schedule Preliminary meeting with retained recruiters and identify candidates	
<i>Pre-Interview</i>	
Confirm candidate is in Applicant Tracking System and if there is a history on the candidate	
Confirm application documents needed to move to the interview stage have been received (ex: resume, LPQ, deal sheets, conflicts forms, all due diligence)	
<i>Interview Process</i>	
Work with firm stakeholders to determine who <i>must</i> interview candidate	
Meet Practice Leader?	
Meet Managing Partner?	
Meet Lead/Managing Partners in other office/2 nd or 3 rd office visit?	
Meet General Counsel	
Meet Chair/Senior Managing Partner of Firm	
Meet with Management/Executive Board Members	
Meet with Recruitment Director re: process logistics	
<i>Post Interview</i>	
Receive complete LPQ with Signature Page	
Collect evaluation/feedback forms	
Compile/Chase for feedback	

LATERAL HIRING STEP	DATE/RECRUITER'S INITIALS
Send LPQ to various teams and practice leaders for review	
Begin Preliminary Client Conflicts Check	
Begin Due Diligence & Background Checks	
Obtain K-1/W2 Equivalent	
Begin Matter History Conflicts Check	
Begin Client Intake Due Diligence	
Prepare Practice Financial Analysis	
<i>Pre Offer/Clearance Checklist</i>	
Confirm due diligence is complete and all questions have been answered	
Confirm conflicts have cleared and closed	
HR Background Check Cleared	
Client Intake DD Cleared	
Firm Management approval of all practice financials	
All candidate paperwork received with signature pages	
Comp discussions with Lead Partner/Hiring Partner	
Preliminary agreement on comp (equity v. non-equity, base, bonuses, draws, capital contributions, collections/realizations thresholds, billable hours thresholds, billing rates)	
If applicable, draft offer letter and term sheet and receive appropriate approval	
Determine who will extend offer, if applicable	
Check References, if permitted	
<i>Offer and Post Offer</i>	
Verbal Offer Accepted; Receive returned signed offer letter	
Prepare paperwork for Lateral/Executive Committee for Review (e.g. Memos, completed evaluations, financial analysis, etc.)	
Proposal Approval; Prepare for Vote	
Schedule Integration Planning call with Managing Partner, Practice Group Leader and Business Development	
<i>Onboarding</i>	
Schedule onboarding call with lateral	

LATERAL HIRING STEP	DATE/RECRUITER'S INITIALS
Questions to ask: Are you moving boxes, furniture? Computer set-up Phone number transfer Order specific library materials, books, subscriptions Transfer of files letters for clients Any specific set-up preferences	
Secretary assignment and reach out	
Prepare first day orientation (IT training, lunch, cocktail welcome, meet the managers)	
Integration	
Set 30-60-90 day reminders for managing partner and practice leader to check in	
Schedule initial call with GC/conflicts review team to help lateral open new matters ASAP	
Assign Partner Advisor	
Work with BD to schedule introductory calls for practice development	
Flag welcome calls for all Chiefs, Management to reach out	
Schedule follow up IT training/intranet training	
Schedule 6-month check in and 1 st Year Review	