



Gettin' Sticky With It:

Boosting Your Lateral Integration Value-Add

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Today's Storyboard

- Successful Integration Saves the Day
- Why Laterals Fail: The Main Culprits
- Our Hero: YOU!
- Boost Your Value Add
 - The Assessment Ace
 - The Proactive Pre-Planner
 - The Transitionator
 - The Perfect Point
 - The Culture Czar
 - The LPQ Whiz Kid
 - The Fixer
- Action! – Crafting Your Boost Plan



Successful Integration Saves the Day...But How?

- Protecting firm's investment
- GOAL: Meaningful stickiness
 - Thinking strategically about lateral hire
 - Wooing onward → multi-phase, 18-24 month process
 - Game changer in war for talent
- The Signs
 - Lateral knows answers to "W" questions
 - Both sides delivering on promises
 - Math + Chemistry (Numbers + Relationships)
 - "I feel like a part of the fabric of this firm!"



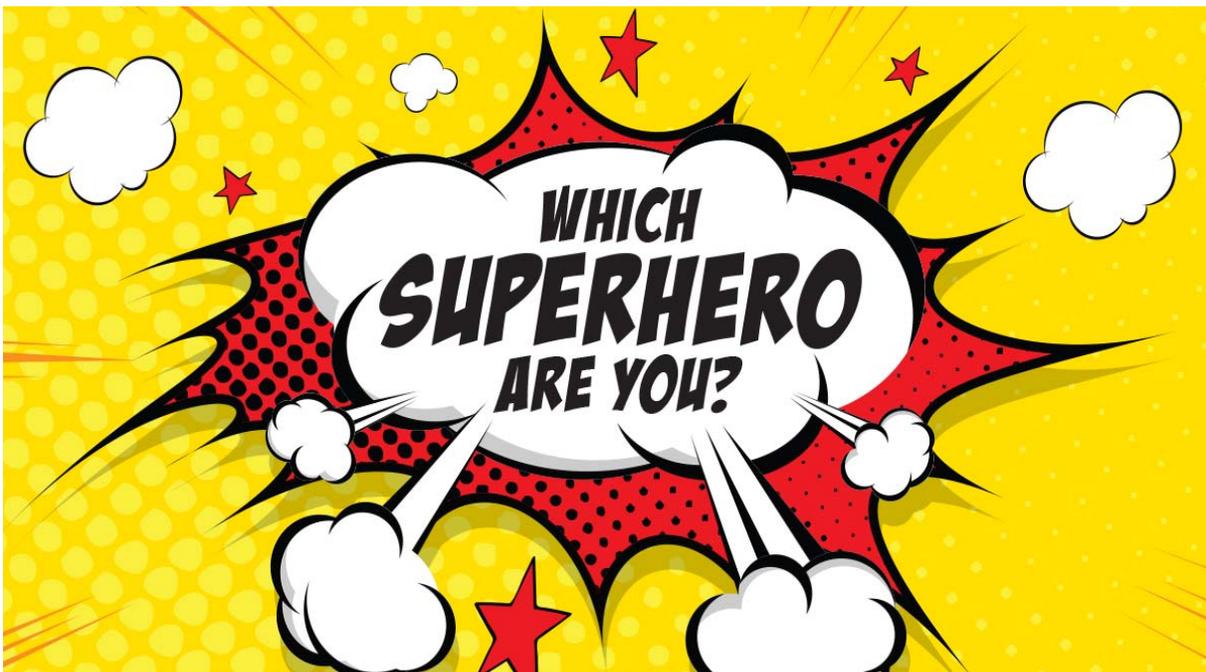
Why Laterals Fail: The Main Culprits

- Poor hiring decisions/match
- Unrealistic expectations – theirs AND yours
- Reactive vs. proactive efforts
- No point person responsible for their success
- Left to their own devices; "island of misfit toys"
- Time to devote to integration activities
- Juggling split responsibility of firm and lateral
- Ownership of integration efforts



Our Hero: YOU!

- Uniquely positioned to fight failure culprits
- Leverage your:
 - Distinct “guide” skills
 - Inter-firm relationships
 - Organization savvy
- Spectrum of Impact → Hero Options
- The Upside
- The Pitch to Leadership



The Assessment Ace

- Travels two tracks
 - Gathers & dispenses info
- Authentic dialogue & honest assessment
- Ensures buy-in early & often
 - Structures useful interviews & eval prompts
 - Loops in integral connectors during assessment phase
- Outlines mutual expectations
 - Clear, deliverable
 - Avoid broken promises
 - Lateral Expectations Statement



The BOOST: Set and support expectations for both lateral and firm!

The Proactive Pre-Planner

- Schedules “Listen Fest” to inform integration plan
- Established roadmap + customized plan
 - Useful templates
 - Individualize
 - Triggers timeline of To Do’s
 - Work-in-progress to meet lateral’s needs
- Preps Integration Partner
- Rallies cross-department allies



The BOOST: Fight reaction-only-mode by thinking ahead!

The Transitionator

- Focuses on smooth transition experience
- Delivers early win
- Knows “devil is in the details”
 - First impression is everything!
 - Lateral & their clients
- Leverages people skills to alleviate anxieties
- Arms lateral with “validators”



The BOOST: Execute seamless, stress-free move from prior firm to yours!

The Perfect Point

- Brings integration plan to life!
 - Enforces To Do's
 - Herds the cats
- Combats organization know-how vacuum
 - Processes
 - Accountability
 - Planning discipline
- Active & intelligent “dot connecting”



The BOOST: Serve as face and project manager of integration process!

The Culture Czar

- Cultural educator
- Connects past with present
 - Where they've been vs. where they are now
 - Share organization nuances
- Schedules check-ins to build cultural prowess
 - Weekly → 60 days
 - Bi-weekly → 60 days
 - Monthly → Year



The BOOST: Lateral can successfully navigate firm nuances!

The LPQ Whiz Kid

- Leverages due diligence phase
- Recognizes key LPQ integration indicators
- Morps LPQ data into integration strategy
 - Math + Chemistry
- Shares info w/ integration team to curate plan
 - PR
 - BD
 - Marketing
 - Integration Partner

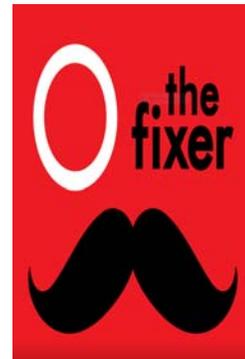


The BOOST: Utilize early-stage info to craft cross-department To Do's!

The Fixer

- Double loop learner
- Reflects on best practices & areas for improvement
 - Orientation
 - Integration: business, social & cultural
 - Promises made/broken
- Lateral “interview” & written feedback
 - Three, six, 12 and 24 month marks
- Updates individual integration plan accordingly

The BOOST: Continually tweak integration processes for stickiness!



Action! - Crafting Your Boost Plan



That's a Wrap!

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