

LATERAL INTEGRATION - A CASE STUDY

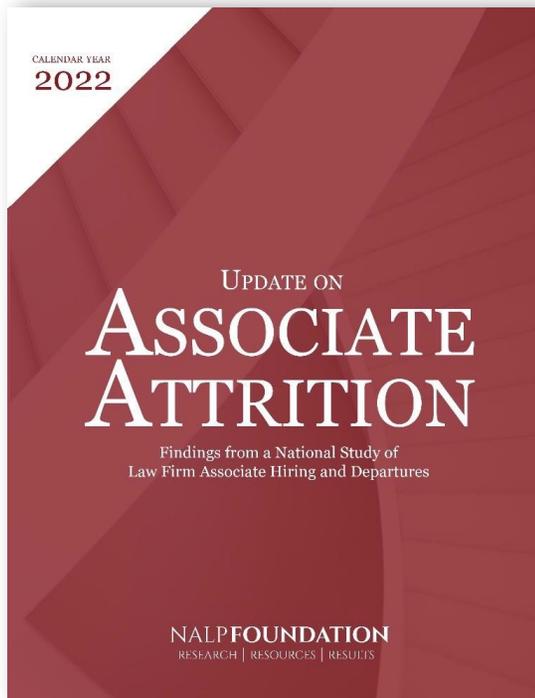
Shannon Burke | Director of Talent Development & Diversity
Chapman and Cutler LLP

Stacey Kielbasa | Chief Talent Officer
Chapman and Cutler LLP



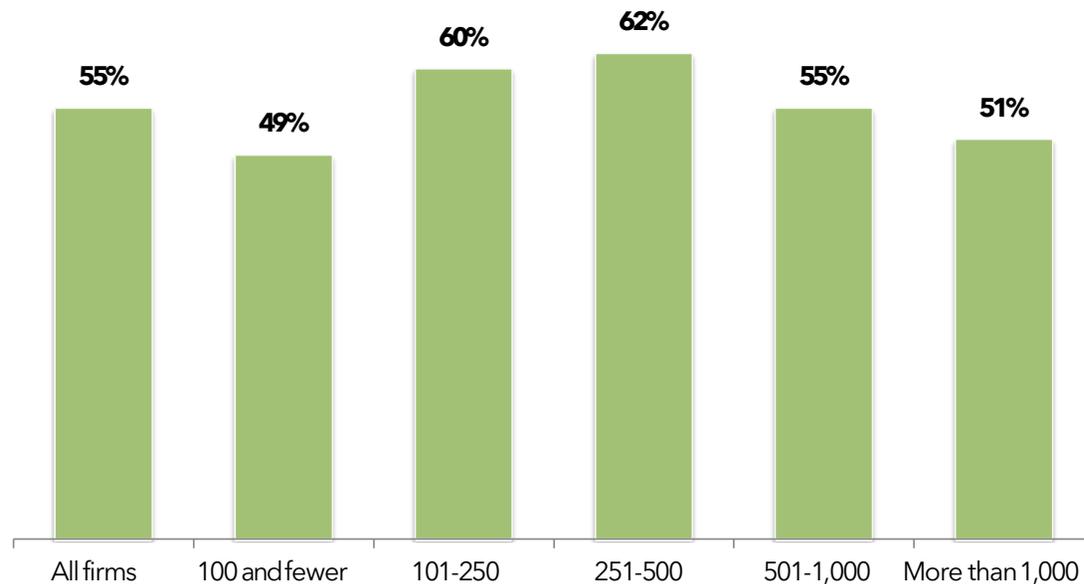
The Problem

Background and Methodology



- Data collection January - February 2023.
- Data from 128 law firms across the U.S. and Canada.
 - 6,786 associate hires
 - 4,068 associate departures
- Empiric data aggregated; also segmented by firm size and demographic features.
- New this year:
 - Associate hiring by quarter
 - Advancement opportunities as factor for departures
 - Diversity, Equity and Inclusion (DEI), legal recruiting, and professional development roles as next destinations
 - Breakouts for firms with more than 1,000 attorneys
- Ongoing Queries:
 - Departure date tracking for each associate
 - Rehires
 - Departure reasons: DEI, support for mental health/well-being, community/connectivity, remote/flexible work, vaccination/testing policies
- Full report to be released Spring 2023.

2022 Lateral Hires as a Percent of Total 2022 Associate Hiring



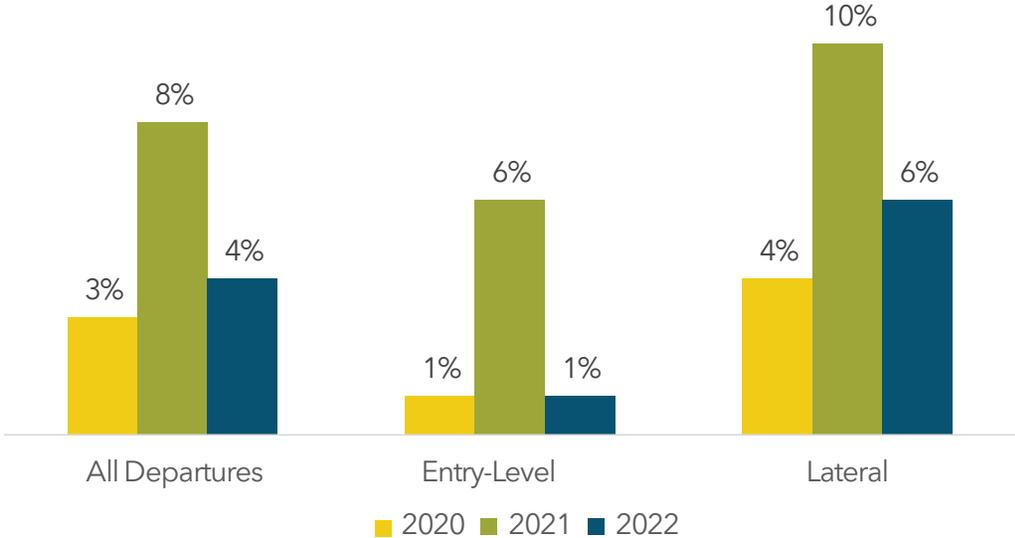
Status of Time of Departure - Lateral Associates

Year	Associate's Departure was...		
	Unwanted	Desired	Neutral
→ 2022	58%	20%	22%
2021	63%	17%	20%
2020	56%	28%	16%
2019	62%	21%	17%
2018	56%	22%	23%
2017	49%	28%	24%
2016	51%	27%	22%
2015	52%	33%	14%
2014	50%	25%	25%
2013	41%	31%	28%
2012	45%	30%	25%
2011	45%	30%	25%
2010	44%	30%	26%
2009	25%	49%	26%
2008	36%	36%	28%
2007	39%	31%	30%



Associate Departure by Tenure - Within 1 Year of Hire

% Departing Within 1 Year of Hiring Year



Associate Departures by Tenure - Within 5 Years of Hire



Longer Tenures

- Entry-Level Associates - 71%
- Summer Associates - 70%
- White/Caucasian Associates - 75%

Shorter Tenures

- Lateral Associates - 85%
- Non-Summer Associates - 84%
- Associates of Color - 84%





Why Integration?



“Lateral hires who engage in collaborative work with their new colleagues are about 16 times more likely to stay longer with their firm, to hit or exceed their targets, and to thrive professionally.”

-ALM, quoting research by Heidi Gardner



Integration moves the needle

- Social connections make laterals “sticky”
- Collaboration = profitability and retention
- Integration done well can improve morale of the existing lawyers and help them feel more connected to the organization
- Setting milestones to create small wins can improve productivity, intrinsic motivation, and feelings of positivity regarding work and the organization
- Mentors help productivity, belonging, and retention



Getting Buy In



Points to consider

- Who are the key stakeholders?
- What might you achieve if integration were improved?
- What are the costs if you do nothing?
- What resources might you need? Time, money, etc.

Who has a seat at the table?



FIRM LEADERSHIP



PRACTICE GROUP LEADERS



HIRING COMMITTEE



ASSOCIATE EVALUATION AND COMPENSATION COMMITTEE



LATERAL HIRING PARTNER/COMMITTEE



TALENT DEVELOPMENT



ADMINISTRATIVE DEPARTMENTS





*Our Experience
at Chapman with
Getting Buy In*



Setting Priorities

NALP 2023 Annual Education Conference

Narrow your focus

- Pre-Hire/Onboarding
- Mentoring and Training
- Goals and Milestones
- Productivity/Retention
- Integration into Firm
- Integration into Practice Group
- Cultural touchstones





Set Goals in Each Area - Examples

Onboarding / Pre-Hire

- Decrease time from date of hire to full integration (Chapman, Firm and practice ready)
- Onboard new clients quickly and capitalize on business development opportunities
- Internal marketing
- Improve transparency with existing attorneys when identifying lateral needs

Productivity / Retention

- Increase lateral job satisfaction
- Develop and motivate laterals
- Introduce into Chapman culture (sticky)
- Highlight successful laterals/practice group integration and publicize best practices

Milestones / Goals

- Decrease time from date of hire to full integration
- Support collaborative culture within Firm and practice groups - introduce laterals to other aligned practice groups for cross-marketing and sharing of cross-departmental resources
- Set Short/Medium/and Long-term Goals for lateral and Practice Group



*Our Experience
at Chapman with
Setting Priorities*



Generating Action Items

NALP 2023 Annual Education Conference

Next Steps

- Consider creating subcommittees or working groups
- Research ideas from peer firms and similar industries (look at NALP resources)
- Brainstorm within sub-groups
- Survey laterals - what worked, what didn't work, what worked at prior firms/jobs?
- Enlist other administrative departments to help - you may be helping them solve their pain points!



Regroup

- Present ideas to various subgroups and ask them to prioritize action items
- Include any ideas generated by laterals/administrative staff
- Socialize action items and priorities with the task force/committee as a whole.
- Once you have buy-in of the task force, identify any additional resources
- Meet internally with your team or team tasked with implementation and assign tasks and projects. Some work can be assigned to the sub-groups!
- Set reasonable deadlines and dates for reporting to larger group





*Our Experience
at Chapman with
Generating Action Items*



Implementation

Helpful Hints for Implementation

- Utilize technology
- Pare down orientation for first week
- Circle back multiple times
- Utilize laterals who have been through the process as advisors/peers
- Shift as much as possible to pre-boarding
- Liberal use of checklists and calendar appointments
- Leverage other administrative departments
- Don't forget fun!





*Our Experience
at Chapman with
Implementation*

Examples of Implemented Changes

New Pre-Hire Procedures

New Onboarding Procedures

Enhanced orientation with significant changes

Milestones and touchpoints





Examples of Implemented Changes

- Technology needs for onboarding and mentoring
- Development of handouts and materials
- Update of communication materials and procedures
- Orientation buddies / peer mentors / Lateral Attorneys BRG
- Lateral Attorney Retreat / Reception



Onboarding | Pre-Start Date

Meet with Practice Group Leader(s) to assign the Supervising Partner and Onboarding and Workflow liaisons and to discuss any special circumstances required by the lateral.

Meet with the Supervising Partner, Onboarding Liaison, and Workflow Liaison.

- Discuss responsibilities, the orientation schedule, and any other topics.
- Send checklists to the Supervising Partner, onboarding liaison, and workflow liaison. Include the lateral's target hours and colleagues in their same class year.

Onboarding Liaison contacts the lateral to welcome them to the Firm and answer any questions they may have.

Recruiting sends \$150 swag bucks to Chapman store

Pre-hire survey circulated



Pre-Hire Procedures

Socialize the lateral hiring plan with non-partner attorneys

Meet with non-partner attorneys to explain:

- Need for lateral hire
- Job posting
- Referral bonus
- Brainstorm ideas for potential candidates
- Ask them to participate in interviews

Automated Request for Lateral Attorney Form



Welcome Binder

Table of Contents

- Policy Manual
- Practice Group Descriptions
- Biographies of Attorneys in Practice Group
- Supervising Partner Responsibilities
- How to ... Whom Do you Call
- Firm Contacts
- Timekeeping Guide
- Productive and Non-Billable Matter Numbers
- Firm Style Guide
- Year-End Evaluation Template
- Competencies

Orientation Schedule Template



Chapman and Cutler LLP Orientation Schedule

Name	Telephone Extension	
Title/Department	Timekeeper Number	
Location	Office #	
Supervising Partner	PGL(s)	
Onboarding Liaison	Email	
Workflow Liaison		

Welcome to Chapman and Cutler LLP! The following sessions have been designed to familiarize you with the Firm's policies, procedures, structure, support services, and key personnel. These sessions, along with similar activities or discussions within your department, will give you the tools and information you need to successfully launch your career at Chapman and Cutler LLP. As part of the orientation process, you will be assigned e-learning trainings through viDesktop. If you have any questions about the orientation, please contact Isabella Bankowski at extension 3802.

Day One

	WELCOME: Jessica Hoffer, Legal Recruiting Manager, Shannon Burke, Professional Development, Diversity and Pro Bono Manager and Isabella Bankowski, Professional Development and Business Operations Coordinator, will welcome you, review your Orientation Schedule and provide you with an overview of the services provided by the Talent Development Department	
	MACSUPPORT SETUP: Michael Kedzierski, Technical Support Manager, will assist with your computer set up, passwords, etc.	
	NETWORK OPERATIONS: A member of Network Operations will assist with setting up phone, Zoom, etc.	
	TECH TRAINING: Training Department will provide tech training.	
	NEW HIRE PAPERWORK AND ISOLVED: Debbie Nacik, Human Resources Generalist, Stephanie Marion, Human Resources Project Coordinator, and Shara Refugio, Human Resources Assistant, will guide you through the completion of onboarding paperwork.	
	PRACTICE GROUP LEADER: _____, Practice Group Leader, will provide a Practice Group overview	

Day Two

	TECH TRAINING: Training Department will provide tech training.	
	BENEFITS PART 1: Elizabeth Zamora, Benefits Manager, and Jalela Mitchell, Benefits and Wellness Assistant, will discuss the options available in the Firm's group benefits programs and provide you with materials and enrollment forms for the various programs.	
	SUPERVISING PARTNER: _____, Partner, will welcome you to the department, discuss hours expectations, introduce you to others in the department and answer any questions you may have.	
	ONBOARDING LIAISON: _____, Associate, will welcome you to the Firm and answer any questions you may have.	
	WORKFLOW LIAISON: _____, Associate, will provide you with an overview of people to know, benchmarks, who else is in your class and answer any questions you may have.	

Day Three

	KNOWLEDGE AND RESEARCH SERVICES ORIENTATION: Sarah Andeen, Director of Knowledge and Research Services, will provide an overview of the Department's services, including current awareness tools, research assistance and available databases	
	MARKETING ORIENTATION: Nancy Linder, Chief Marketing Officer, will give you an overview of the services provided by the Marketing Department.	
	OFFICE SERVICES AND EMERGENCY PREPAREDNESS: Doug Domenick, Director of Office Services/Facilities Management, will introduce you to Office Services and emergency preparedness.	
	ADMINISTRATIVE SERVICES ORIENTATION: Marie Pisarek, Chief Support Services Officer, and Monica Martella, Administrative Assistant Supervisor, will discuss administrative services provided by the Firm.	
	BENEFITS PART 2: Elizabeth Zamora, Benefits Manager, and Jalela Mitchell, Benefits and Wellness Assistant, will discuss the options available in the Firm's group benefits programs and provide you with materials and enrollment forms for the various programs.	
	MEET AND GREET WITH PRACTICE GROUP ATTORNEYS	
	MEET AND GREET WITH ADMINISTRATIVE ASSISTANT	

Day Four

	TECH TRAINING: Training Department will provide tech training.	
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Day Five

	TIMEKEEPING: Shannon Burke, Professional Development, Diversity and Pro Bono Manager will review timekeeping best practices and answer any questions you may have.	
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Supplementary Integration

- Over the next few months, you will also receive calendar invites for the following:
- Virtual social event with the Practice Group attorneys
 - Coffee chats with members of the Employment Committee and other attorneys in your class
 - Routine check-ins with your Supervising Partner and Onboarding Liaison
 - Routine check-ins with members of the Talent Development Team
 - Meet-and-greet with the Chief Executive Partner Greg Klamrzynski, the Chief Operating Partner Bill Libit, the Chiefs and Directors of the various Administrative Departments, and Pro Bono Counsel Sara Ghadiri
 - PPC Orientation
 - Coffee chats with representatives from the Associate, Counsel, Staff Attorney, and Senior Counsel Committee
 - Coffee chats with your Practice Group Leader
 - Weekly check-ins from the technology trainers



Milestones and Goals



Monthly check-ins with Supervising Partner



Bi-monthly check-ins with Onboarding Liaison



1-month, 3-month, 6-month, 9-month and 1-year check-ins with talent Development



1-month, 6-month and 12-month surveys



90-day debrief with Talent Development



1-year check-in with Talent Development

Report out on Progress

- Meet periodically with subgroups to report on implementation and discuss successes and challenges
- Report on initiatives and progress to Firm Management and Associates Committee
- Ask administrative groups for feedback and report progress
- Consider including successful strategies in recruiting materials





What about you?



Gather Data

Seek Feedback

- Create and disseminate surveys to new laterals at 6 months and a year
- Include feedback questions during milestone check-ins
- Look at retention rates of laterals vs. period prior to changes
- Examine productivity of new laterals. Assess if changes have resulted in increased productivity
- Has the effort resulted in any changing attitudes towards lateral hiring?
- Are legacy attorneys more involved and comfortable with the lateral integration process?





Post-Start Onboarding Check-In Survey Examples

Post 1-Month

- Please provide at least one suggestion on how we can improve the onboarding and integration process at the Firm.
- Please provide at least one recommendation on something we did well during the onboarding and integration process and should continue to do so going forward.

Post 6-Month

- Is there anything the Talent Development team can help you with at this time?

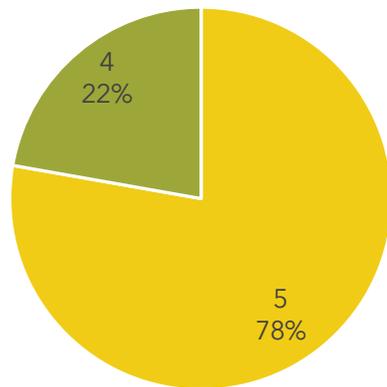
For example, can we arrange coffee chats for you to meet various partners? Put regularly check-ins on your and your supervising partner's calendars? Arrange a social event with other non-Partner attorneys in your practice group? Help you create a professional development plan for yourself, recommend resources or other trainings? Other ways we can help?



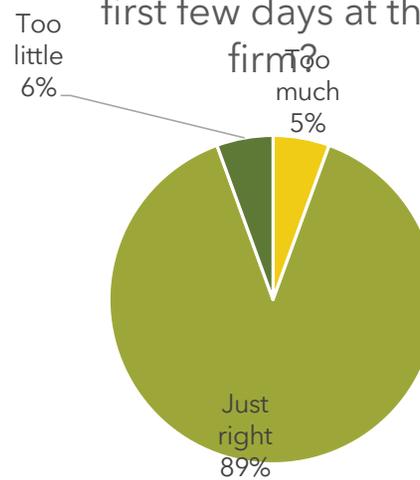
*Our Experience
at Chapman with
Gathering Data*

One Month Check-In

How would you rate your interactions with the Firm prior to your start date?



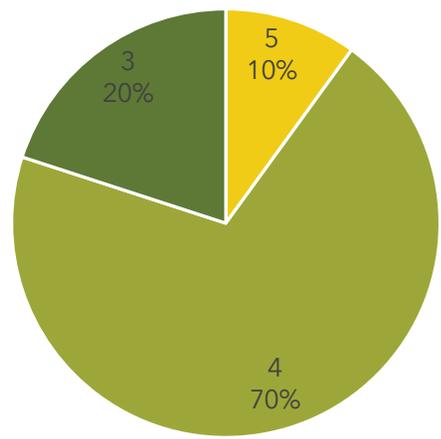
How was the amount of unstructured time in the first few days at the firm?



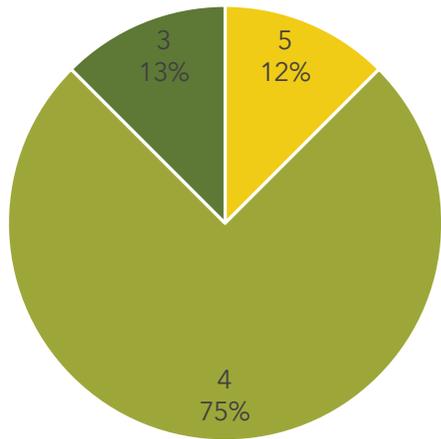


Six Month Check-In

How integrated do you feel at the firm?



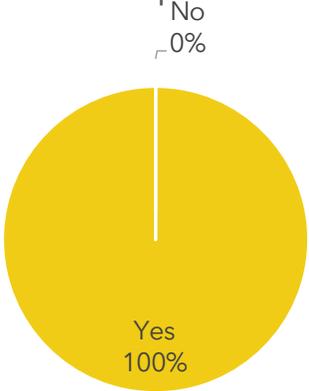
How integrated do you feel in your Practice Group?



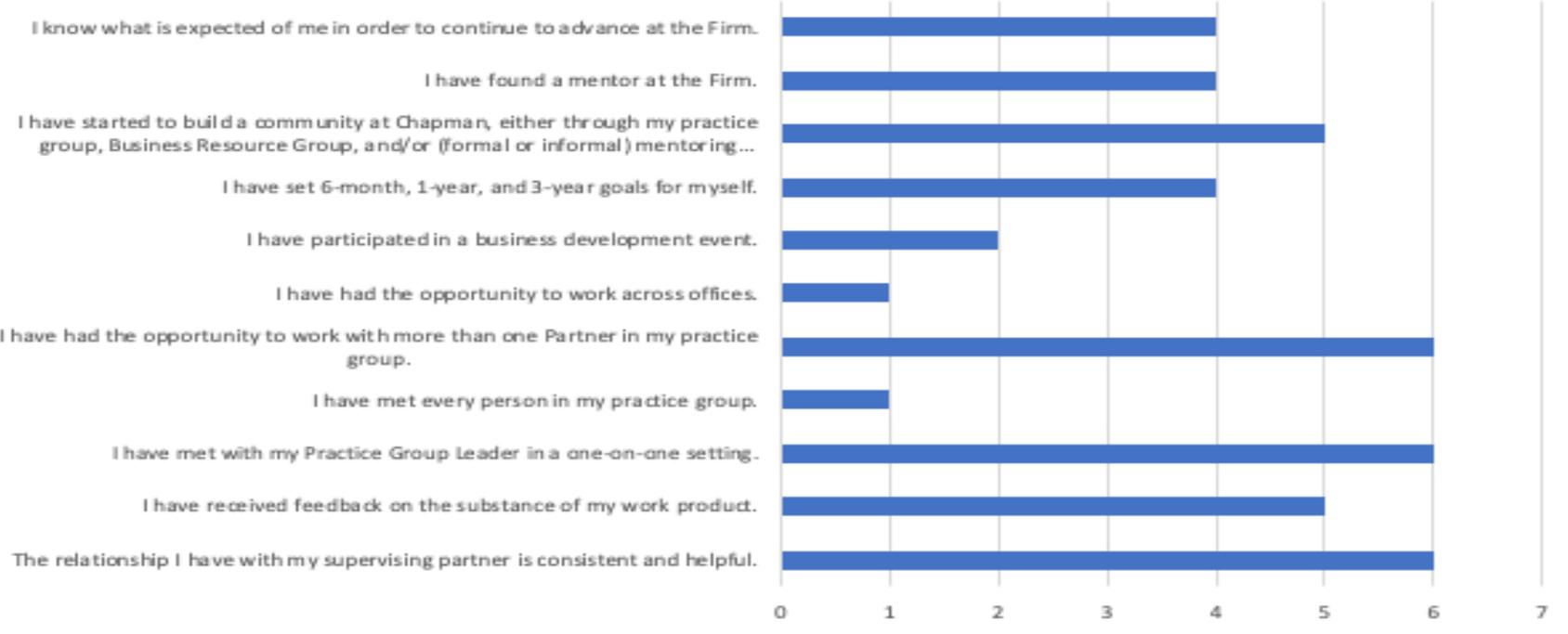
One Year Check-In

Do you feel integrated into your Practice Group? The Firm?

Do you feel integration into your Practice Group? The Firm?



Post-Start 6-Month Onboarding Check-In Survey Results





Unexpected Challenges



*What we would do
differently*



Questions?

Let's Keep in Touch!

SHANNON BURKE



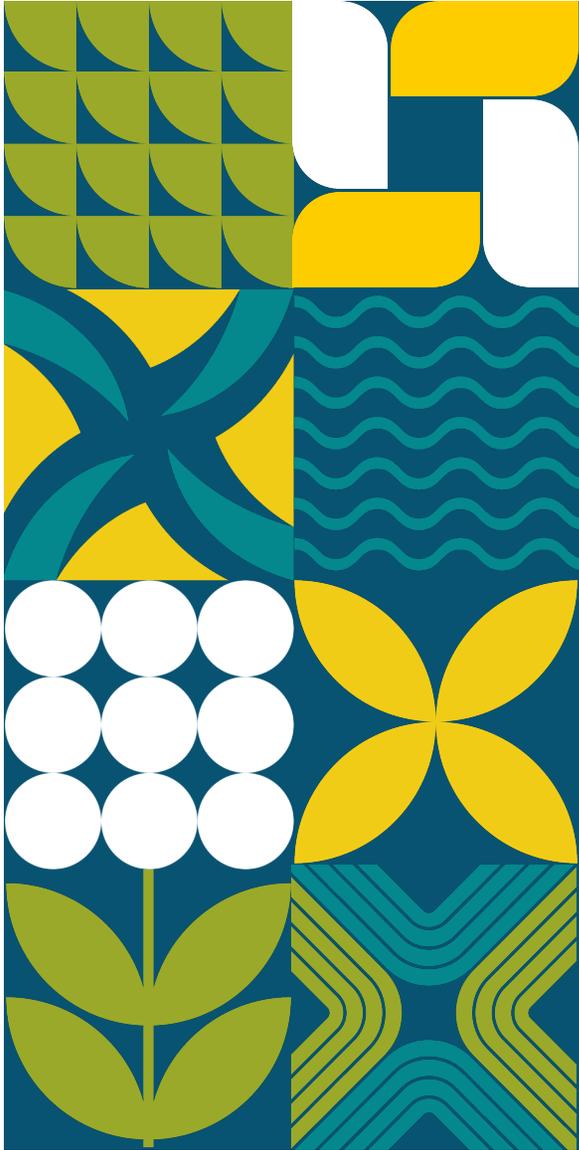
312.845.2987
shaburke@chapman.com

STACEY KIELBASA



312.845.2997
kielbasa@chapman.com





THANK YOU

LAITF - One Month Check-in

Welcome to Chapman! We are excited to have you as part of the team and hope your transition to the Firm has been a smooth one.

We are constantly looking for ways to improve our onboarding and integration process and would appreciate your feedback. If you would prefer to give your feedback in person, please feel free to contact Shannon Burke (ext. 2987).

Thank you, in advance, for your feedback!

* This form will record your name, please fill your name.

1. What is your title?

- Associate
- Staff Attorney
- Counsel
- Senior Counsel
- Partner

2. On a scale of 1 to 5 (5 being the highest rating), how would you rate your interactions with the Firm prior to your start date (e.g., interacting with the recruiting department, interviews, being contacted by your onboarding liaison prior to your arrival)?

- 5 (very positive; I was looking forward to starting)
- 4 (generally positive)
- 3 (neutral)
- 2 (hesitant)
- 1 (negative)

3. On a scale of 1 to 5 (5 being the highest rating), how confident did you feel in what to expect during your first few days at the Firm?

- 5 (extremely confident)
- 4 (somewhat confident)
- 3 (neutral)
- 2 (somewhat not confident)
- 1 (extremely not confident)

4. Was there any information that you did not receive prior to your arrival that you would have liked to have had? As a reminder, prior to your arrival, you should have received all HR paperwork and benefits information; a list of "who to call" for particular questions or concerns; a flip-book of people within your new practice group; a telephone call and follow-up email from your onboarding liaison; and contact information for the HR, Records, Technology, and Office Services Departments.

5. During your first few days at the Firm, we wanted you to have time to meet your colleagues and have a sufficient amount of unscheduled time to meet with clients (if necessary) and get acclimated to the Firm. Was the amount of unstructured time we allotted:

- Too much
- Just right
- Too little
- No opinion

6. Were you provided all necessary tools to perform your job on the first day (e.g., hardware, software, guidelines, etc.)?

- Yes, I had all the necessary resources and felt that I could hit the ground running.
- I was provided with some resources but had to seek out additional resources
- I felt unprepared for my first day.

7. Please indicate what tools or resource you had to seek out on your own and would have liked for the Firm to have provided to you.

8. Please rate the following statement: "Training / onboarding during my first week was helpful."

- Strongly agree. After my training / onboarding, I felt well-prepared to take on my responsibilities / duties.
- Agree. I understood most parts of my responsibilities / duties.
- Strongly disagree. I did not get sufficient training / onboarding relevant to my position.

9. You indicated that you did not get sufficient training / onboarding relevant to your position. What training, resources, or information would you have liked to have had during your onboarding?

10. How would you characterize your technology / computer training?

- Too much: I felt overwhelmed with the amount of technology training in the first week and would have preferred less training.
- Just right: The amount of technology / computer training was a good balance of length of time and amount of information.
- Too little: I find myself having to reach out to the training department to ask questions that we did not have time to address during the initial training.

11. Did you feel you could reach out to others for help or you knew who to call for assistance?

- Yes
- No
- Other

12. Please provide at least one suggestion on how we can improve the onboarding and integration process at the Firm.

13. Please provide at least one recommendation on something we did well during the onboarding and integration process and should continue to do so going forward.

14. Please feel free to add any other comments you would like to share.

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Lateral Attorney Integration - One-Year Check-In

* Required

* This form will record your name, please fill your name.

1. Do you feel integrated into your Practice Group? The Firm? If not, what do you feel is missing? *

2. Were your Supervising Partner, Onboarding Liaison, and Workflow Coordinator (if applicable) helpful to you in your integration with the Firm? Is there anything you wish they would have done (or not done) during your first year at the Firm? *

3. Looking back at the orientation schedule over your first year, are there any trainings that you would move earlier or later to the schedule? Any trainings that you think should be added to or removed from the schedule? Do you feel there were any gaps in your training? *

4. Do you feel you have had the opportunity for stretch assignments? Do you feel you have had an opportunity to work with different Partners and on different deal types? If not, who would you like to work with or what types of deals would you like the opportunity to work on? *

5. How is your workload? Do you feel you have good, consistent sources of work? Too much? Too little? *

6. Do you feel you are growing professionally at Chapman? If so, in what ways? If not, what can we do to help you have opportunities for growth? *

7. What do you like most about working at Chapman? What is something that we could change that would make your work or your experience at Chapman more meaningful? *

8. What are your goals for yourself over the next 12 months? How can we help you get there? Create a PD Plan? Trainings? Presentation opportunities? Connect you with the Marketing Department or another internal or external resource?

*

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LAITF - Six Months Check-In

Congratulations on your six month anniversary at the Firm!

We are constantly looking for ways to improve our onboarding and integration process and would appreciate your feedback. If you would prefer to give your feedback in person, please feel free to contact Shannon Burke (ext. 2987).

Thank you, in advance, for your feedback!

* This form will record your name, please fill your name.

1. What is your title?

- Associate
- Staff Attorney
- Counsel
- Senior Counsel
- Partner

2. On a scale of 1 to 5 (5 being the highest rating), how integrated do you feel at the Firm?

- 5 (very integrated)
- 4 (comfortable, but not completely integrated)
- 3 (neutral)
- 2 (I know some people, but do not feel comfortable at the Firm)
- 1 (I know very few people at the Firm)

3. On a scale of 1 to 5 (5 being the highest rating), how integrated do you feel in your Practice Group?

- 5 (very integrated)
- 4 (comfortable, but not completely integrated)
- 3 (neutral)
- 2 (I know some people, but do not feel comfortable in the Practice Group)
- 1 (I do not know people in my Practice Group)

4. How would you describe the quantity of your workload?

- Too much. I feel consistently underwater and overwhelmed.
- Just right. There are some days that are very busy and other days that are lighter. But overall, the quantity of the workload is appropriate and manageable.
- Too little. I am consistently looking for work and / or nervous that I am not getting enough billable work.

5. How would you describe the type of assignments you are working on?

- Every assignment feels like a stretch assignment for me. I feel overwhelmed by the amount of new information I am expected to learn and need training or other resources.
- Just right. I am being challenged in a healthy, sustainable way.
- I need more of a challenge substantively.

6. Please select all of the statements that are true.

- The relationship I have with my supervising partner is consistent and helpful.
- I have received feedback on the substance of my work product.
- I have met with my Practice Group Leader in a one-on-one setting.
- I have met every person in my practice group.
- I have had the opportunity to work with more than one Partner in my practice group.
- I have had the opportunity to work across offices.
- I have participated in a business development event.
- I have set 6-month, 1-year, and 3-year goals for myself.
- I have started to build a community at Chapman, either through my practice group, Business Resource Group, and/or (formal or informal) mentoring group.
- I have found a mentor at the Firm.
- I know what is expected of me in order to continue to advance at the Firm.

7. Is there anything the Talent Development team can help you with at this time?

For example, can we arrange coffee chats for you to meet various partners? Put regularly check-ins on your and your supervising partner's calendars? Arrange a social event with other non-Partner attorneys in your practice group? Help you create a professional development plan for yourself, recommend resources or other trainings? Other ways we can help?

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