LATERAL ONBOARDING CHECKLISTS

(Name and Title of Lateral)

Pre-Arrival Interview – Lateral

Transition Lead

Explain role as point person. Introduce others.

Office Administrator

Do you have anything for us to move?

Furniture

Client files / boxes

Other personal belongings

Name of current office/facilities contact

Can you give me a feel for how closely you work with an assistant?

(how heavily does he/she rely on LAA support?; tasks generally want LAA to do or not do; will he/she need someone highly trained on file opening in first days or weeks?)

Information Technology

Let's talk about your IT preferences:

Laptop with docking station or Desktop?

One or Two monitors?

Firm Blackberry, Firm Samsung, or bring your own device?

- Firm device: Would you like to port your current cell phone over to the firm?
- Personal device: explain GOOD and reimbursement of $25/month
- Convey standard e-mail format to lateral.

Do you have electronic files to transfer?

Do you have contacts and a calendar to transfer?

Who is the point of contact for IT at your current firm?

Do you have a docket to transfer?

Do you have special IT programs or software that you use regularly?

What is your experience with the following firm systems, so that we may prioritize training?

- WorkSite document management
- Aderant Time Entry
- Cisco telephone
- Webex

Marketing / Communications / Business Development

Discuss media relations, including press release and announcement schedule.

What is your availability for a media relations call?

Request contact list.

Discuss immediate client needs.

Explain what to expect during orientation meeting with BD Manager.

Client Intake

Are you bringing over active matters?

How many?

Discuss the importance of release letters – needed to transfer files, import electronic files, and import e-mails.

Transition Lead

Discuss business cards: middle initial? Nickname? Cell phone? Admitted in home jursidiction?

Are there any calendar conflicts your first few weeks that we should work around when drafting an orientation schedule?

Is there anyone in particular you want to spend 10 minutes with on your first day/week?

Schedule meetings with:

Overall: What is your number one priority during this transition?

(ex. Open active files, training, meeting people, press/reaching out to contacts, etc.?

Closing: I will be your transition lead throughout the process. Please use me as a go-to person for any question or needs, and I will help connect you.

Pre-Arrival Interview – Practice Group Head

Transition Lead

Do you have any office/location preferences?

Is there anyone in particular you would like us to line up for lunch on his/her first day?

Are there any associates you would like us to introduce him/her to for work?

Brief practice group head on checklist and best practices.

Arrival Checklists

Recruiting Checklist

______ Complete conflicts checks

______ Receive copy of signed offer letter

______ Verify bar admissions

______ Begin background check

______ Assign phone number

______ Send arrival notice

______ Send resume and bio to Professional Development and Marketing

______ Send LPQ clients list and prospects to Professional Development and Marketing

______ Send business plan to Professional Development and Marketing (if applicable)

Professional Development Checklist

______ Give heads up on arrival to senior staff as soon as possible

______ Send welcome to the firm / transition e-mail to lateral

______ Conduct Pre-arrival interview

______ Order business cards and notepaper

______ Send lateral new contact information

______ Send HR forms and Benefits Packet to lateral

______ Create and circulate orientation schedule

- ______ Systems training
- ______ Meeting with ethics chair / conflicts
- ______ Meeting with client intake manager (file opening procedures)
- ______ Meeting with billing manager
- ______ Meeting to discuss firm structure, key policies, evaluations
- ______ Benefits overview
- ______ Meeting with library representative
- ______ Meeting with marketing / business development
- ______ Meeting with practice technologies (if applicable)
- ______ Meeting with docketing manager (if applicable)

______ Arrange lunch for first day. (Come prepared with top 3 things they wish they had known day 1)

______ Create welcome packet

(overview of firm practice areas; org charts; firm initiatives; top 50 clients in firm/division/practice group; face book/contact list for practice group; client service guidelines, important firm policies)

______ Send reminder e-mail for first day

______ Conduct office walk-thru (day before)

______ Send welcome e-mail to all firm personnel

______ E-mail bio to alumni of the lateral's law school

______ Update PLI roster

______ Schedule follow up check-ins at 1 month, 3 months, 6 months, 9 months, 12 months

<u>Marketing / Business Development Checklist</u>

______ Obtain current firm bio (incl. publications, events, rankings, awards)

______ Download LinkedIn profile

______ Conduct a news search on lateral

______ If litigator, run a litigation profile

______ Analysis of geographic/practice differences between current firm and our firm

______ Conduct pre-arrival interview

______ Schedule PR call

______ Obtain/import contacts for media relations, including announcement

______ Draft press release

______ Draft bio

______ Draft external electronic announcement

______ Draft Talking Points for lateral to use re: "Firm Fast Facts"

______ Schedule photographer

______ Send professional photo to IT for firm directory

______ Update Martindale-Hubbell

______ BD representative meets lateral within first two weeks

Office Administrator / Facilities Checklist

______ Assign office number

______ Schedule courier/mover

______ Assign LAA (see pre-arrival interview on LAA needs)

______ Update EMTA

______ Clean/prepare office

______ Set new chair and mat in place

______ Set office supplies in place

______ Install nameplate

______ Assign file cabinets and send to LAA

______ Create badge

______ Office Administrator introduces self

IT Checklist

______ Conduct pre-arrival interview

______ Create network set up, including remote access and PVN

______ Issue conference call bridge numbers

______ Prepare mobile device or e-mail lateral if BYOD

______ Install phone and computer

______ Import electronic files

______ Import contacts, calendar, e-mail

Practice Group Leader Checklist

______ Announce lateral's acceptance and encourage partners to reach out before arrival.

______ Schedule meeting with lateral

    ______ Give high level overview of firm's strategic plan.

    ______ Talk about firm's top clients

______ Ask LAA to set follow up reminders at 1 week, 1 month, 3 months, 6 months

    ______ Are others working with laterals clients? / vice versa

    ______ Are you getting involved in any firm activities or committees?

Lateral Checklist

______ Create distribution list for announcement; give to PR/communications team

______ Create a voicemail greeting

______ Meet with new LAA to discuss preferences for phone, mail, and managing calendar and e-mail

______ Change address of record at the local and state Bar Associations and prof. organizations

______ Compile travel profile information (rewards numbers, preferences) for LAA

______ Update LinkedIn

______ Reach out to suggested partners to meet / firm leaders

______ Read Governance Manual

______ Enroll in Benefits within 30 days

______ Create a business plan

    ______ Meet with Business Development Manager regarding business plan

    ______ Share final business plan with Practice Group Head

    ______ Ask LAA to set calendar reminders for business plan follow ups