



Monday Monday

Connecting the Dots with Karen Kaplowitz



*Helping you create and reinforce the habits of successful career building,
gleaned from my work as a business development strategist, trainer and coach*

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The Fortunate Few: Laterals Who Made It Through

Announcements of completed lateral moves in the legal press are as infrequent these days as wedding announcements in the mainstream press. Are the new laterals fortunate -- or not -- to be making a move during a global pandemic? As an expert on lateral integration, I believe the laterals who made it through are extremely fortunate. In normal times, integrating laterals often takes a back seat, no matter what the level of enthusiasm for the new lateral. But now, because of the limitations on in-person meetings and travel for roadshows, firms must be much more intentional about integrating new laterals. So how fortunate new laterals are is really in your hands. Here are some best practices, updated for the crisis:

- Before day one, deliver a fully configured laptop and cellphone to the lateral's home along with a directory of all law firm personnel, including cellphone numbers. Schedule a run through with a firm IT professional.
- Assign a lateral integration partner and a seasoned assistant to the lateral.
- Inform each lawyer who interviewed the lateral of their start date so they can reach out to welcome the lateral. Ask each interviewer to be prepared to discuss one of the client synergies with the lateral that excited them in the first place.
- Put the least burden possible on clients about the move. Other than work the laterals handle themselves, consider retaining lawyers from the old firm on existing matters, for the time being. Assure the legacy firm that you will facilitate payments of outstanding fees. Expect that clients will have no tolerance for conflicts between the firms.
- Provide the lateral with a lateral integration plan which includes:
 - The marketing, business development and public relations staff who will be involved
 - The schedule for key internal meetings including regular practice group meetings; the meeting of the management committee when the lateral will be welcomed; any partner meetings
 - Schedule of integration meetings to review which matters have been opened and which are stalled
 - Introduction of lateral to leaders of relevant affinity groups and schedule of affinity group meetings; insure that the lateral is not isolated
 - Target date for completion of the lateral's business development plan including virtual opportunities for the lateral to introduce firm lawyers to his or her clients and vice versa

The laterals who made recent moves are fortunate that their moves were far enough along to be consummated before recruiting activity declined sharply. How fortunate they are will depend on how well they and their firms handle the integration process in these challenging times.

Example: When a lateral partner received an offer in February, she considered putting the move on hold because of the crisis. She decided to go forward when the new firm's managing partner assured her that the firm understood that she would only do it in the most client-centric way possible. She said that meant minimal staffing changes on her matters and protecting her old firm's receivables. When the managing partner concurred, she accepted the offer. Even before she started, she felt nurtured when the firm's IT head explained that the firm's offices would be closing before her start date but that she would be receiving a delivery of a new, fully configured laptop and cellphone so she would have access to the firm's systems immediately. The weekend before her start date, the lateral was delighted to receive the delivery with some extras: several rolls of toilet paper. She was also thrilled that the firm's Women's Initiative sent a welcome note with a list of favorite films to occupy her young children during meetings, organized by the length of the films and age appropriateness.

In this time of crisis, are you taking special care to welcome and integrate the new people in your organization, in the most client-centric way possible?