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ADDING AN INTEGRATION COACH TO OPTIMIZE YOUR RECRUITING INVESTMENTS

Why Integration Coaching?

Financial and resource investments in recruiting new partners are necessary and significant. Yet too often, new partners, within the first years after arrival, leave their new firms either due to their own frustration and disappointment, or they are asked to exit the firm due to unmet expectations.

Integration coaching helps to address this costly problem. The New Ellis team offers a dedicated focus: to facilitate, expedite and accelerate the onboarding process. We work to keep the key players' attention on important integration steps. As a new partner's guide, we help to minimize distractions for new partners so that they can attend to transitioning their clients and files. We also offload from busy leaders' desks the need to direct and track the many steps along the integration process. Our process follows a checklist of crucial items that otherwise may receive only cursory attention or, even worse, are completely overlooked. And we keep tabs on progress so that all stakeholders are aware of any issues and can efficiently course-correct as needed.

Who is involved?

For integration coaching to be most effective, selected lawyers and staff, the new partner(s) and the integration coach engage interactively in this process. We, as the coach and point person, conduct due diligence, outline what will be expected, and keep all players involved and informed. Adapting the process to each firm's specific culture, practice structure and staffing model is a collaborative process.

What areas are addressed?

Though each firm differs from the next, there is a core set of issues and functions that need to be incorporated into a comprehensive onboarding effort. The summary checklist below outlines typical considerations to address in these areas.

Expectation

- Can you be sure your new laterals have the same expectations that you do?
- Have you specifically covered these areas with your new partners?

• Origination	• Leverage	• Timekeeping	• Budgeting
• Revenue generation	• Staffing & Work allocation	• Collections	• Cross-selling
• Pricing and discounts	• Billing	• Compensation	• Firm citizenship

Business Mission

- Do your new partners have a clear understanding of the firm's business plan? Do they understand how their individual practice plan supports and complements the firm's plan?

Firm Leadership

- Has your new lateral had the opportunity to meet the members of your executive management team?
- Have opportunities been identified where new laterals can meet other partners, especially practice leaders and those partners with related practices and clients?

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Clients

- Have you reviewed your client demographics with your new partners?
- Do your new partners understand the client mix as related to size, public/private, industry sectors, geography and tenure with the firm?
- Do your new partners know how to identify client relationship managers?
- Are there specific rate considerations of which new partners should be aware?
- How about the multi-practice profile for top clients – do your new partners understand how cross-selling has been most effective?
- Have opportunities with the laterals' transitioning clients been explored?

Practices

- Has your practice structure been fully explained to your new laterals?
- Have new laterals been introduced to their practice groups and those that relate to their individual practices?
- Do new partners understand what drives the practice groups' profitability?
- Have your new partners been included in practice communication channels?
- Do laterals understand how practices collaborate?

Culture

- Have laterals had the opportunity to ask questions about even the most tactical aspects of life in the new firm?

Business Development

- Have you explained to your new partners how marketing and business development efforts are coordinated within and across practice areas?
- Channels to vet potential conflicts – do your new partners understand these channels?
- Have the internal processes to track business development initiatives (and prevent stepping on others' efforts) been explained to new partners?
- If your new partners have business development budgets to tap, are all players clear on the amount and how these resources are accessed?
- Have new partners been introduced to the staff that supports these marketing and business development initiatives?

Technology

- Has the appropriate team reviewed the firm's technology resources -- e.g., project management, billing systems, CRM, work allocation – at a time when the new partner has need to use these resources?

Staff Resources

- Does your new partner understand how the administrative resources are structured and accessed? Does she/he have a "who do you call?" directory?

How does this coaching process work?

It is difficult for a busy firm to direct and regularly attend to the myriad integration needs of newly hired partners. What's needed during the critical first few months is a focused, informed guide whose undivided attention is on the whole picture, helping to tap key players and resources -- and keeping stakeholders engaged. Unlike any other player in the process, this is our sole focus.

Keeping integration goals front and center, our strategy involves due diligence, priority setting, "at the ready," one-on-one support and ongoing communication with the integration team:

- With rigorous preparation and with input from leadership teams (lawyer and administrative), we familiarize ourselves with each firm's structure and processes. Ideally, this is accomplished prior to the new partners' arrival.

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- Typically, first meetings are in person. We meet with key stakeholders and outline the approach and resources that will be needed. An in-depth, initial meeting with the new partner creates an important baseline, and any specific / immediate priorities/concerns are identified. Meeting frequency is established. Subsequent meetings to update progress are often accomplished via telephone. Most importantly, we recognize that needs dictate process, so we are ever flexible and always available.
- A three-month schedule of integration coaching most typically launches the new partner, with a sound footing, into the firm. We conclude each engagement with a detailed summary of activities and recommendations for any needed follow up. We are also available, if and as needed, to participate in subsequent, follow-on discussions.

Considering the total investment in lateral recruiting - and the costs associated with a failed partner acquisition - adding an integration coach to the process, at a comparatively low cost, makes smart business sense.

Are there any side benefits?

Add competitive power to your firm's recruiting message with the assurance that new laterals' integration will be guided by a dedicated and informed resource. There is an inherent message that the firm values and is fully invested in a new partner's success. Differentiating your firm from the field of others competing for new talent, you will add value to your recruiting efforts.

Final thoughts

The integration process is not the time to make assumptions, expect others to take the lead and employ a "sink or swim" strategy. That is, literally, far too costly. This is the time to actively embrace new talent and opportunity and to invest in the near term -- for long-term, mutually satisfying results.

Karen Kaplowitz, Integration Coach and Business Development Coach
kkaplowitz@newellis.com / 888.890.4240

In her work as a business development coach and consultant, Karen frequently works with firms who are integrating new laterals and with laterals that are personally committed to a successful transition. Karen also brings to her work her experience as a practicing trial lawyer and rainmaker and her service as the marketing partner of a very successful mid-size Los Angeles firm. Karen has published extensively on strategies for success in lateral moves.

Joanne McElhenney, Integration Coach
jmcelhenney@newellis.com / 617.275.9162

Joanne brings more than two decades of senior management experience working with professional service firms. Her law firm background includes leadership roles in practice administration, recruiting, business development and marketing. Joanne is recognized for a thoughtful, proactive service approach; superior client service skills; and a highly approachable delivery. Her broad perspective offers to laterals and their new firm a heightened awareness of and an organized strategy to address those factors and processes that drive results-oriented partner integration -- and continuing partner success.