

"Reprinted with permission from the 2/15/2011 issue of *The Legal Intelligencer*. (c) 2011 ALM Media Properties, LLC. Further duplication without permission is prohibited. All rights reserved."

## **Making a Marriage Work: Ensuring Long-Term Success In Lateral Integration**

February 15, 2011  
Elaine Rinaldi Bailey<sup>1</sup>

Have you ever thought that attracting lateral partners to your firm is much like dating and marriage? You have worked hard to attract a key lateral partner with a big book of business to your firm. You have spent a lot of time and effort, culled through a lot of other candidates and finally found what you have long desired — the lawyer of your dreams with a track record of success, a great pedigree, a significant client following and the right personality. You both have decided to walk down the aisle and close the deal.

The marriage has been consummated and your new life begins. But as we all know, the euphoria of those early days does not always last long. Reality sets in and the hard work begins. Just like in marriage, the time, effort and cost you expend will only result in long-term success if both parties are committed to a successful combination.

In the law firm world, the development and implementation of an integration plan that goes well beyond the typical "marketing" integration plan (spreading the news of your new partner through press releases, websites, marketing materials and like) is the key to a successful combination. Your integration plan should be developed long before your new lateral partner begins employment. In order to be successful, a plan must pay close attention to the social, administrative, logistical and business development aspects of integrating a new partner into your law firm.

Every law firm has a culture, and ensuring that the lateral partner you are recruiting fits into that culture is one of the most important aspects of a successful hire. Social and cultural integration should begin during that first interview with a lateral partner.

Law firms are accustomed to doing due diligence on laterals and asking key questions: is the expertise of a lateral of the highest caliber; does the lateral have a book of business and is it portable; do the clients strategically fit with the firm's existing clients; and are there conflicts that may impact the lateral partner's ability to be successful in your firm?

---

<sup>1</sup> Elaine Rinaldi Bailey is a partner at Cozen O'Connor and is responsible for directing the firm's strategic planning and expansion, including the firm's continued growth in key markets both nationally and internationally. She can be reached at [erinaldi@cozen.com](mailto:erinaldi@cozen.com)

### ***Check Cultural Fit first***

But as important as due diligence is, the cultural fit between the law firm and the potential new lateral partner is equally important. A firm can increase its chances of long-term success in integration if management is able to show the firm's culture at the onset of the relationship.

In order to best accomplish this, consider moving away from the typical interview process where a candidate spends time in a series of meetings with individual partners and firm management.

Oftentimes, the culture of a law firm can be better portrayed in a group meeting, where partners and firm management meet with the lateral partner together. The lateral partner may be better able to experience your firm culture firsthand by observing the exchange between firm partners in that setting.

Although some may consider this setting to be more intimidating for the potential lateral partner, if handled properly it better portrays the personality of the firm and how the partners within the firm interrelate with one another. Hopefully, the environment also allows for the personality of the lateral partner to be better demonstrated.

Once the cultural fit has been assessed, hopefully all of your due diligence has demonstrated that this lateral partner would be a great fit for your firm. After you have inked the deal but before the lateral partner actually joins is when the real work begins. If your integration plan is a written one, as it should be, you should be prepared to immediately commence the implementation of your plan.

The creation of an integration team consisting of key legal and administrative personnel is the best way to successfully put your plan into action, particularly if you are bringing on a group of lateral lawyers. At a minimum, someone at a high level in the firm must take ownership over the integration process. It is important to recognize that integration of a lateral partner typically can take up to two years, to ensure the long-term success of the "marriage." Given the significant cost investment a firm makes in recruiting and integrating laterals, firm management should make certain that someone in the organization is being held accountable for that successful integration.

### ***Logistical Integration***

Getting your lateral partner engaged into your firm immediately will set the stage for success. In order to do this, you must address logistical issues before the lateral partner arrives. Technology is one of the most important aspects of integration. The lateral partner's contacts and electronic information should be promptly uploaded onto all of the lateral partner's devices, as well as into the firm's CRM system. All case-related documentation should be uploaded into the firm's document management system.

At this juncture, the conflict analysis should have already been completed, but it is important to be sure that any outstanding conflict issues have been resolved so that the lateral partner can begin the process of informing clients of the move and complying with the ethical requirements for the transfer of any client matters to your firm. Support staff should be assigned to the lateral with particular consideration to experienced secretaries and, if required, paralegals who are most

knowledgeable of your firm's operations, systems and processes to ease the lateral partner's integration into your firm.

One of the most important logistical integration issues can be the lateral partner's office assignment. For an individual lateral partner, office location and proximity to other lawyers practicing in the same area of law is crucial for easy access to support staff with appropriate skill sets and associates who may be assigned to assist the new lateral partner. Choice of office location can also be enhanced by considering factors such as shared schools or outside interests that the lateral partner may have in common with potential office neighbors.

In the case of a group of lawyers joining your firm, office location can be critical. It can often be difficult to integrate a group with an established social network into a larger group. Although a law firm might easily place that group of lawyers into existing open office space on a new floor or section of the firm, that tactic may not be the best for successful integration.

Consider reorganizing your office space to intersperse your new lawyers with your existing lawyers. The cost associated with moving existing offices to accommodate the new lawyers may be quickly outweighed by the benefits of a faster social integration achieved through not only increased interaction between existing lawyers and the new laterals, but also the insights that your existing lawyers can share with your new laterals on the firm's culture, processes and procedures.

Equally important is ensuring that your new lateral has a mentor or buddy with whom to connect. Mentors are as critical to the successful integration of lateral partners as they are for the professional development of new associates. Assign a partner in the firm who is well respected, knowledgeable and personable. The mentor should be someone willing to take the time to make introductions, convey valuable firm information and answer questions regarding your firm.

### ***Business Development Intergration***

One of the biggest concerns of lateral partners is the firm's ability and willingness not only to support their current practice but also to provide them with a platform on which to expand it. Cross-selling is never easy and it requires not only an understanding of the firm's inter-workings, but also a deep understanding of the firm's existing lawyers and clients.

You should develop a business plan that addresses not only new clients that the lateral partner brings to the firm and the depth of services the firm has to offer those clients, but also the firm's existing clients who may benefit from the services provided by the lateral partner. Developed by the lateral partner and the firm's marketing, business development and finance professionals, the plan should be organized into time segments with actions to be taken during each segment by both the new lateral as well as the firm.

The direction provided by a business plan will allow the lateral partner to focus business development efforts promptly upon arriving at the firm and force him or her to spend the time necessary in getting to know the partners in the firm, the firm's existing clients and the firm's depth of services that will ensure a successful integration.

When hiring a lateral partner, the goal should be that one plus one equals three, four or even more. A law firm that is satisfied with "one plus one equals two" will not realize the benefits of its new lateral partner and most probably will not retain that lateral partner for long.

### ***Social Integration***

Trust is a fundamental underpinning to cross-selling. The willingness of a partner to introduce a new partner to a client occurs when partners know each other, like each other and respect their ability. This can only happen when lawyers are given the opportunity to spend time with their colleagues. You should not overlook the value of in having the new laterals attend social gatherings and firm meetings.

Significant time should be spent introducing your new laterals at practice group and department meetings and providing them with an opportunity to talk about their expertise and business development opportunities. New laterals should be afforded an opportunity to speak to the firm's board and executive committees and to join appropriate firm committees. Clients should be identified that would benefit from the new lateral's expertise, and the appropriate meetings and lunches should be arranged.

As law firms continue to grow, it becomes increasingly more important for the firm to ensure that its lawyers have an opportunity to get to know one another. Firms should hold annual or bi-annual partner retreats. Along with being a great opportunity to bring all of your firm's stakeholders together to work on management and strategic issues, these meetings also provide great opportunities to continue lateral integration both professionally and socially. During these meetings, new lateral partners should be showcased.

### ***Conclusion***

In the end, a comprehensive integration plan is essential to ensuring the success of any incoming lateral partner. Success requires many things, but perhaps nothing is more important than the commitment from firm management and its partners to devote the time, energy and expense to the integration process. Law firms seek to grow not for growth's sake, but for the purposes of expanding the depth of services to clients and, consequently, the revenue generated. The cost you expend in ensuring the successful integration of your new lateral partners will only serve to enhance your bottom line by making for a successful long-term marriage.