

Experience Is the Best Teacher for Lateral Moves

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The Legal Intelligencer, Top Laterals Supplement

February 24, 2014

Fourteen years ago, I joined Marshall Dennehey Warner Coleman & Goggin as a lateral shareholder. At the time, I knew one person at the firm and had been hired to practice out of a Florida office a thousand miles from its Philadelphia headquarters. Today, I am a member of the three-person executive committee, responsible for the day-to-day management and business strategy of our 490-lawyer firm.

My progress owes much to the team of mentors with whom I started. I was fortunate to be embraced by a group of lawyers and administrators who promoted my practice, shared clients and opportunities, told me stories about the firm, taught me its culture and guided my career.

They were friendly, supportive and trustworthy, and, without their investment in me, I would not be where I am today.

I wanted everyone to have the same experience. As a firm, we understood laterals were important. They were part of our history. They had allowed us to diversify, expand our geographic reach and better serve our clients. Their personalities, intellect and values had added to our practice, our culture and our success. When it came to integrating them, though, our results were uneven. We did many things well, but when we fumbled, the consequences were destabilizing, bad for morale and distressing to our business.

We needed to be consistent, learn from our mistakes and develop best practices to ensure that all laterals, be they lawyers or support staff, had a positive experience. We wanted these men and women to appreciate and adapt to our culture, policies and practices as quickly and as easily as possible. With these goals in mind, we began to develop a lateral integration program for the entire organization.

There was much to learn. We began by forming a study group to interview attorneys who came to the firm as laterals. We interviewed a cross-section of shareholders and associates from different practice groups and a number of different offices. We met with them individually and spent a lot of time asking questions we had prepared in advance. Their responses were enlightening.

At the one extreme was a group of people who described their integration as “seamless.” At the other was someone who described it as a “tsunami of negativity.” Descriptions of our culture included “friendly,” “collaborative,” “one of shared success” and “a place where people go to bat for one another.” But there were also outliers who described their experience as one in which they felt lost in the process.

These interviews were not gripe sessions. We asked a lot of probing questions and encouraged candor. What we received were constructive responses—and the overwhelming majority of them were positive. We got what

we asked for, including a lot of great suggestions for improving the process.

Perhaps the most affirming aspect of the whole exercise was listening to people describe how and when they came to trust the firm. Personal accounts of what it meant to them to be empowered by their supervisors or given responsibility at an early stage, and stories of personal kindnesses and support by others, made us proud to work at the firm. Even the most ardent critics felt the firm had always kept its promises and those who had bad experiences appreciated the firm's efforts to correct mistakes.

The bottom line was that we had a good firm. We were not perfect, but we were trying to improve, and every lateral we spoke to appreciated the effort. After collecting information from the interviews, we surveyed the vast collection of articles and books on the subject of lateral integration. We then took all we had learned and began meeting with practice group leaders, regional office managing attorneys and directors from marketing, human resources, information technology, administrative services, professional development and training, as well as our billing and new files department. It was in these settings that a multidisciplinary approach, customized to our firm, began to take shape.

We next created two booklets. The first was a lateral integration handbook for our managers. The handbook was designed as a desk reference and represented the firm's collective lateral hire experience. It described what to do to ease laterals' transition into the firm, what to avoid, and included rubrics and checklists to ensure our new integration protocols and training were followed completely and consistently throughout the firm. The second publication was a quick-reference welcome guide for new attorneys. This booklet was designed to acquaint lawyers with the organization of the firm. It included segments on who does what in terms of firm governance, practice group

management and administration. It also contained useful phone numbers and answers to frequently asked questions. Both publications proved welcome resources for their intended readers.

As the program evolved, it became apparent that our laterals would benefit from having a point person to shepherd them through the process of integration. They would be interacting with a lot of new people and departments both before and after they joined the firm. Having a go-to person they knew and trusted to coordinate these steps would ensure they occurred in an orderly fashion and that whatever problems did arise were detected earlier and resolved sooner. We thus created the position of lateral integration coordinator.

Our first (and so far only) lateral integration coordinator has come to define the role. She has strong interpersonal, organizational and problem-solving skills, along with a working knowledge of our business developed over decades at the firm. She is trustworthy, funny and, we joke, would have made a great hostage negotiator given her ability to defuse otherwise stressful situations. Our laterals love her.

The combined effect of obtaining input from laterals, administrators and management; identifying best practices; developing new protocols; producing handbooks and reference guides; and appointing a coordinator to oversee the program, has taken the firm to a new level. We had always hired laterals with the hope and expectation they would finish their careers at the firm. By getting them off to the right start and improving their transition we have made important strides toward ensuring they do. But we haven't stopped there.

In 2013, we produced a 20-minute welcome video for laterals and all of our new hires. This did not supplant our formal training or new lawyer orientation programs in Philadelphia, but serves as an additional tool to help introduce employees to the firm's history,

culture, resources and management. It is designed to be viewed by every new employee on their first day of work, regardless of position or within which of our 20 offices they are located. Produced in-house, the video has become one of our most effective resources in the integration process. It guarantees everyone receives the same message, and is on the same page, from day one.

Like most things, the more you practice lateral integration the better you get. This past year saw a huge return on our investment. We essentially doubled our presence in Ohio to 11 lawyers and doubled our presence in New York to more than 50. Along the way, we added individual laterals in Philadelphia and other jurisdictions. It was gratifying to watch our

teams come alongside these men and women and implement our integration program. The laterals repeatedly told us how impressed they were with the firm and our commitment to the process. They got off to fast starts, had positive experiences and bought in early. Best of all, given the number of “plays” we ran, there were no fumbles.



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