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10 Key Strategies For Successful Lateral Partner Integration

By **Elizabeth Kennedy and Erika Steinberg** (September 10, 2025, 4:55 PM EDT)

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An accomplished attorney doesn't just join a new firm — they bet their career on it. In the first weeks of a lateral transition, every conversation, document and meeting can either build conviction that they've made the right move or plant a seed of regret that quietly grows.

Our recent qualitative survey of 40 lateral partners who moved firms within the past two years revealed that most laterals feel their new firms did an excellent job of integrating them, yet most wrote their own announcement email before getting any guidance on the firm's key messages or brand, and many are not sure exactly whom to go to for marketing and business development support.

As our conversations advanced from early onboarding to later stages of integration, clear opportunities for improvement emerged.

Most firms impress newcomers on day one, but few engage in a meaningful discussion about what success will look like a few months down the road — or how it will be measured. Without shared vision or defined objectives, the early momentum that should fuel integration can sputter out just as the work of building a practice begins.

Many laterals recounted meeting extensive teams from billing, marketing and conflicts departments — only to find themselves weeks later unsure whom to contact for support. Conversely, laterals who described their onboarding experience as genuinely supportive had one common advantage: a single professional accountable for integration, armed with a checklist, a timeline and the authority to get things done.

A particularly telling discovery was how often laterals who joined in groups were treated as a collective asset. "It felt like we were one big package," one partner said. "No one really took the time to understand what I personally brought to the table." Firms that neglect individual integration lose the opportunity to unlock each lawyer's unique strengths — and loyalty.

Effective integration isn't just about practice group meetings or perfunctory introductions. Successful integrations are personal, structured and intentional.

The Survey

As 2025 kicked off with a wave of lateral movement across firms of all sizes, our surveyors spoke directly

with more than 40 partners who had recently made a lateral move from one firm to another to hear what worked — and what didn't — in their transitions. The interviews took place between February and June, and our final report was drafted in July. The firms represented are all AmLaw 100 firms, except for two AmLaw 200 and one Magic Circle firm, with an average size of 1,200 lawyers.

We also spoke with professionals in the growing ranks of director or manager of lateral integration roles. All our interviewees spoke on condition of anonymity.

Why This Matters

More law firms are engaged in the lateral market than ever before. Yet surveys show fewer than 50% of lateral partners succeed — according to criteria set by the firms and attorneys themselves, most citing revenue and a few pointing to cultural fit — and more than 40% leave their new firm within five years.[1] That means that of the 25,000+ lawyers who made a move in 2024,[2] 12,500 may not stay long enough, or perform well enough, to meet their own expectations or those of their new firm.[3]

Based on discussions with laterals about what contributed to their success and what they found disappointing, we've identified our top 10 practical strategies firms can implement to improve lateral success rates and ease their transitions.

1. Resist growing opportunistically or just for scale, and ensure your lawyers know your growth priorities.

Just as laterals recruited because of their strengths fuel momentum, laterals who are not aligned with the firm's strategic priorities become frustrated by the lack of resources, budget and support for their practice.

One does not need to search hard to find examples of this, like a firm principally focused on building its private equity business that scooped up a four-partner labor and employment practice introduced by their recruiter because they could — only to part ways with half of them eight months later because they felt unsupported.

Firms that regularly communicate their strategic objectives and growth priorities at firmwide meetings and more broadly will discourage their lawyers and recruiters from referring nonstrategic candidates, and insulate themselves from impulsive hiring.

2. Define success early; ensure the objectives of your candidate and the firm are aligned.

Discuss what a successful combination will look like for the lateral and the firm — is it bringing in new clients, filling a gap for existing clients or contributing to a strategic practice? Host a meeting early in the recruiting process with the candidate(s) and key stakeholders to ensure alignment, and design the course for recruiting and strategic planning accordingly.

Discussing budgets for the role is also a helpful way to clarify expectations around travel, recruiting and business development activity. Consider the range of strategies that will advance shared objectives, agree on a path forward collectively and anticipate the need to pivot.

3. Develop a short, actionable business plan collaboratively before day one.

Planning should be done with the lateral, sponsor partner, integration lead and other stakeholders. The plan should leverage the business case and lateral partner questionnaire used in the recruiting process, and include:

- The one to three big-picture objectives determined when defining success;
- Targeted metrics or key performance indicators to measure progress and keep the team engaged through the end goal;
- Actionable short-term goals; and
- Check-ins calendared for the lateral, integration lead and key stakeholders to discuss progress, consider client and marketplace developments, identify obstacles and support needs, and update and adjust the plan and goals.

4. Start strong before day one.

Assign one professional to lead the integration and be accountable for coordinating and overseeing support from all business services teams, advancing the business plan, and coaching. Ideally, this will be a director of lateral integration. But, if it's a business development or human resources professional, ensure they have the capacity, and a level of seniority and influence on direct execution across departments.

Develop key messages for client communications before clients are notified — or learn — of the move.

Also, retain an ethics lawyer to advise on permissible communications and matter transitions.

Send a day-one Itinerary and welcome kit a week before the start date, including:

- The name and bio of the lead integration professional;
- A single point of contact for each relevant business services function — single contacts avoid confusion and ensure accountability;
- A thoughtfully created schedule of introductory meetings with relevant business services departments;
- A messaging guide for client communications that articulates the value of the firm's platform and includes messaging tailored to the lateral's strategic targets;
- A directory of firm leadership, with photos;
- Sample pitch materials, a calendar of firm meetings and events, an editorial calendar, and office floor plan maps; and
- Instructions for downloading and sharing contacts into the firm's customer relationship management system.

5. Anticipate and prepare to address challenges with client transitions.

A streamlined engagement process led by one senior lawyer or professional who is empowered to make decisions is reassuring to clients and laterals alike.

An approach that's very accommodating to clients and is flexible around rates, outside counsel guidelines, and engagement letters makes negotiations easier when there is an issue that must be resolved, such as with a transitioning client that enjoys a heavy discount from the lateral's prior firm or a partner whose rate requires a carveout from a firmwide fee agreement.

6. Integrate lateral groups as individuals, too, to tap individual strengths and loyalty.

Group introductions and meetings will naturally be part of each group member's integration, but each should also have their own business plan with initiatives customized to their abilities, talents, relationships, interests and level of seniority. One integration professional can be assigned to all group members, if they have the capacity to support both group and individual initiatives.

First, assign an integration partner to each lateral to uncover what's individually valuable about the lawyer, and facilitate connections that are likely to expose synergies and lead to productive relationships.

These arrangements are most effective when the integration partner takes charge of introductions at group gatherings — practice, industry or other team meetings — by articulating from the firm's perspective what the lateral brings to the table and what collaborative actions would be helpful.

Also, ensure the lead integration professional coordinates with the integration partners and laterals, so each introduction has an objective and meetings are coordinated, not duplicative.

For example, if four group members have synergies with the energy group, the lead integration professional should help determine whether a group introduction is appropriate, or if two of the partners should be introduced to the liquefied natural gas subgroup while two others are introduced to the renewable subgroup.

Further, arrange for each lateral to work on a legacy firm matter as early as possible to help them learn the firm's systems and processes.

7. Be strategic and focused on planning and making introductions to the partners and professionals who are most likely to help advance your lateral's business plan.

Prioritize introductions to partners and professionals where synergies are likely, and to those who work with clients that have needs in the lateral's areas of strength.

Remember to include business service professionals who are, or can be, client-facing — e.g., legal project management, innovation, IT, knowledge management and pricing — to ensure that your lateral is informed to bring the best of your firm to market.

8. Equip your lateral for all strategically important meetings — both internal and external — with intelligence briefings, key messages, agendas and business development support.

Intelligence briefings should include internal and external intelligence on clients and industries where opportunities exist. Messaging points should consider the audience: Why is the transition meaningful to your lateral's clients and contacts? What value can the lateral offer to the firm's existing lawyers and clients?

Agendas should be designed to lead to follow-up action items.

Business development support should ideally include a professional senior enough to help craft the business implications and agenda of a successful meeting, and one junior enough to assist with reminders and tracking.

9. Prioritize client-centric, cross-practice teams in your integration process.

Client, industry and product teams enable laterals to share their experience in a focused way, and to engage with multidisciplinary teams on specific issues that are important to a particular set of buyers.

Laterals should arrive at these meetings with both answers — about who they are, what they know and how they got their experience — and questions, i.e., "Tell me about your big-tech sector clients and successes"; "What are the group's goals?"; "Is there a gap that I may be able to fill?"

Practice groups play an important role, but they are not typically client-centric, and they often include multiple lawyers offering similar services to similar clients — which can be a breeding ground for sharp elbows.

10. Adopt a lateral integration process to make your laterals' experiences consistent and to ease the burden on every professional involved.

Laterals who joined firms with a clearly defined lateral integration process reported organization, clarity and efficiency upon arrival.

An effective integration process should ease the burden on the lawyers and professionals tasked with integration and feel seamless to the lateral, not like an obstacle course. It should clarify roles and responsibilities for everyone involved, provide clear direction, and align initiatives with both the lateral's and the firm's objectives.

Additionally, the process should incorporate scheduling and coordination, leverage established templates and best practices, and include ongoing monitoring to quickly address any issues that arise.

Consider the following steps to create an effective process:

- Solicit feedback from partners who have successfully integrated into your firm.
- Gather your firm's current integration stakeholders from recruiting, HR, conflicts, finance, public relations, business development, facilities, IT, and other relevant departments to discuss roles and pain points.

- Appoint a lead professional to update your processes to ensure roles, responsibilities and timelines are clear.
- Bring your stakeholders back together to tweak the new process, ensure all professionals know what they need to deliver, and when and how their contributions affect success.
- Centralize and share simple tools like follow-up trackers, and templates for check-in meetings and progress reports — automate wherever possible.
- Create a forum or portal for stakeholders to communicate success stories and problems.

Conclusion

The real work of integration continues long after onboarding concludes, and its success depends on how intentionally and strategically firms engage with their laterals.

Our research underscores the importance of recognizing each lateral's distinct value, crafting personalized integration plans, facilitating purposeful introductions and proactively addressing transition complexities.

Firms that embrace structured, tailored integration practices and prioritize meaningful interactions will outperform their peers in lateral retention and productivity.

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The full survey report can be found on the authors' websites here and here.

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[1] Bryn Bowen, "Law Firm Lateral Hiring: How Better Hiring and Onboarding Processes Can Help Your Firm Improve Retention and ROI," --With 48% of laterals leaving within 5 years, 62% failing to bring their promised book of business, and 35% failing to fit in at the new firm, a robust vetting process is crucial.-- InTapp Blog, May 26, 2023, https://www.intapp.com/blog/law-firm-lateral-hiring/.

[2] Leopard Solutions, State of the Legal Industry: Lateral Patterns by Firm Growth Chart, white paper, January 2025.

[3] As Craig Savitzky, Director of Content Creation, Leopard Solutions, puts it, "With tens of thousands of lawyers making lateral moves in 2025, the fact that nearly half may not succeed is a wake-up call. Firms must look beyond resumes and recognize that success often depends on cultural compatibility, trusted relationships, and shared strategic goals."