

## Lateral Integration Communications Checklist

*Utilize this checklist as a tool for coordinating, launching and seeing through communications plans for your firm's lateral hires.*

### Before Arrival

#### Creative

- Draft a bio using lateral hire's current iteration, resume and information from the recruiting department.
- Interview lateral hire on why they decided to accept the job. Use this information to draft a quote for the press release.
- Draft a press release.
- Allow lateral hire to review bio and press release.

#### Logistics

- Arrange for a headshot to be taken.
- Ask lateral hire to share contacts ahead of start date so that they can be imported into the CRM.
- Ask lateral hire if there are any marketing materials they want to preview so they know what to send to clients on their first day.
- Get lateral hire's integration team together to discuss roadshow visits and strategy.

### First Day

#### Creative

- Marketing team to prepare an email the lateral hire can share with their contacts.
- Marketing team to work with lateral hire on one-pagers they may need to send to specific clients on platform, capabilities or cross-selling opportunities.

#### Logistics

- Distribute press release.
- Add bio with headshot to website.
- Send internal email announcement about lateral hire to the firm.

## Roadshow Visits

### Strategy

- Identify cross-selling opportunities.
- Talk with the lateral hire's integration team to identify offices and key personnel to visit.
- If monthly lunches are happening in offices, try to target the lateral hire's visit during one of those days and arrange lunch meetings for them. Let people know ahead of time so they can plan on an in-office day if working on a hybrid schedule.

### Logistics

- Set up meet and greets with clients on the lateral hire's behalf so they can meet in person if the lateral hire is visiting an office in a city near them.
- Prepare roadshow meetings by providing key personnel and lateral hire with insight into the purpose of the visit. State if it is to discuss a particular client or industry.
- For offices the lateral hire will not travel to, host meetings with 1-2 key personnel and facilitate a call on the lateral hire's behalf. Introduce the lateral hire using the welcome email with a link to their bio.