**100 Day Lateral Partner Integration Program**
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# 100 Day Lateral Partner Integration Program
# OVERVIEW

We have developed a defined firm wide "100 Day Lateral Partner Integration Program" that can be customized for each new lateral partner who comes on board. Our objective is to make transitions for lateral partners as seamless as possible and to ensure that our lateral partner hires are given the support necessary to hit the ground running and fit into the firm culture. Our lateral integration program includes the following core components:

First, we assign each lateral partner an Advocate who partners with them to take ownership of the integration actions and jointly monitor progress.

Second, we work with each lateral partner on their plan to transition existing clients and develop new business, with objectives and expectations. This document includes a timeline by which we hope that, together with the firm's support, objectives and expectations can be met and success can be measured. Along with the help of their Advocate, the Office Managing Partner and the CFO, new lateral partners eventually report to Firm Management on their progress with the plan.

Third, to help new lateral partners meet their objectives and expectations, we market them throughout the firm by facilitating strategic introductions. This way new lateral partners immediately begin to build relationships that could lead to strong cross-selling opportunities. Those meetings, both professional and social, also help new lateral partners fit into our culture here at Kelley Drye.

Finally, starting in the recruiting phase, a team of people at the firm, including administrative leaders (from Recruiting, Marketing, Finance, IT and Records) and KDW partners, are responsible for providing new lateral partners with the necessary support and information to migrate their practice to the firm.

The firm invests significant time and effort to identify and recruit lateral partners. We believe that by extending the period of time that firm resources are targeted toward lateral partners and by utilizing a defined plan of action for integration, we increase the potential for their long-term success at the firm.

## 100 Day Lateral Partner Integration Program
## LATERAL INTEGRATION TEAM MEMBERS AND KEY RESPONSIBILITIES

**Advocate**

The Advocate is responsible for providing the lateral partner with information, strategic introductions and general guidance throughout the integration timeline and partnering with the lateral partner to meet objectives and expectations identified in the Lateral Partner Questionnaire or internal business plan. The Advocate works closely with the lateral partner, the Office Managing Partner and the COO to monitor progress of the LPQ/business plan and the integration process. The Advocate's role is to establish support for the lateral partner to promote the lateral partner's ultimate success at the firm.

**Chief Financial Officer (CFO)**

The Chief Financial Officer (CFO) is responsible for periodically reviewing financial statistics and data regarding the lateral partner and his/her clients, including billings, collections and new matters. The CFO also periodically meets with the Advocate, the Office Managing Partner and the lateral partner to discuss financial targets and objectives and track the progress of the integration program.

**Marketing Department**

The Chief Marketing Officer, one of the Directors of Practice Development, along with the Practice Development Manager ("BDM") assigned to the lateral partner's primary practice group and other Marketing staff, provide the lateral partner with resources regarding the firm's current clients and the industries served by Kelley Drye. The CMO, Director, and BDM work closely with the lateral partner, the Practice Chair and the Advocate to identify cross-selling opportunities and to provide resources to develop those opportunities. The Marketing Department is responsible for external communication regarding the lateral partner and promoting his/her arrival at the firm.

**Office Administrator**

The relevant Office Administrator assists the Office Managing Partner in handling administrative matters related to the lateral partner's arrival at the firm and liaise with the other lateral integration team members as needed.

**Office Managing Partner**

The relevant Office Managing Partner is responsible for making strategic introductions and facilitating meetings/lunches for the lateral partner with other partners in his/her office and throughout the firm. The Office Managing Partner periodically meets with the Advocate, the COO and the lateral partner to discuss financial targets and objectives and track the progress of the integration program.

**Practice Group Chair(s)**

The relevant Practice Group Chair is responsible for ensuring the lateral partner understands the history, priorities and strategy of the practice. The Practice Group Chair advises the partnership of the lateral partner's expertise and industry contacts to motivate partners to cross-sell the enhanced practice and suggest strategic introductions for the lateral partner throughout the firm. He/she is responsible for integrating the lateral partner's business plan into the practice group's strategic plan.

**Recruiting Department**

The Recruiting Department assists in administration of the lateral partner integration program throughout the 100 days. In particular, the Recruiting Administrator reviews the integration timeline and guides other lateral integration team members in meeting their responsibilities within the established deadlines.

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# 100 Day Lateral Partner Integration Program
# PHASES

**PHASE 1: In the first phase, the goal is to get the lateral partner in the door and up and running, make introductions and set specific targets and objectives.**

1) Practical components of working at the firm: getting contacts onto the firm's system, learning our document system and phone, opening new matters, billing time, enrolling in benefits (first week).
2) Welcoming the lateral partner and introducing him/her to key people. Include a Welcome lunch with the Advocate, the Office Managing Partner and the Practice Group Chair (if in the same office) as well as a cocktail reception with the department or the whole office. As early as possible, the new lateral should be formally introduced at the department lunch and the monthly firm meeting.
3) Meetings with Marketing and Practice Group Chair to identify plan of action for announcing the lateral partner's arrival at the firm and for immediate communication with the lateral partner's portable and prospective clients. Identify specific cross-selling opportunities and relevant partners.
4) Work with the lateral partner on specific business development goals. Work with Marketing, Recruiting and Advocate on: portable clients and matters, firm clients that the lateral should be introduced to, partners throughout the firm the lateral should meet for business development opportunities, and specific business generation and billings/collections targets for the first year at the firm.

**PHASE 2: In the next phase, the integration program establishes a timeline for introductions and meetings for the lateral partner in his/her home office, as well as the other Kelley Drye offices. During this time the Advocate, the Office Managing Partner and the CFO review the first financial reports to track the new lateral partner's progress to date. They meet with the lateral partner to identify successes and shortfalls. The Marketing and Recruiting Departments meet with the lateral partner and report back to the Advocate regarding the progress of the integration program.**

1) Introductions to partners in the lateral partner's home office.
2) A road show to meet firm clients and to introduce the lateral partner's clients to other Kelley Drye partners.
3) Travel to other Kelley Drye offices to meet partners.
4) Advocate, Office Managing Partner and CFO meet with lateral partner to discuss progress.
5) Periodic meetings with Marketing, Recruiting and Advocate to track progress.

**PHASE 3: In the final phase of the integration program, the Advocate, the Office Managing Partner and the CFO review financial reports and key statistics, as well as the progress of strategic meetings and cross-selling to date. They meet with the lateral partner to identify successes and shortfalls. Firm Management receives a report on the status of the integration. Finally, the lateral partner will be asked to give his/her feedback on the integration program.**

1) Review key financial statistics and assess whether targets have been met.
2) Advocate, Office Managing Partner and CFO meet with lateral partner to discuss progress.
3) Report to Firm Management.
4) Survey the lateral partner.

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# 100 Day Lateral Partner Integration Program
## PHASE 1

| ***Prior to lateral partner's arrival*** | | | |
|---|---|---|---|
| **TASK** | **RESPONSIBILITY** | **PROPOSED COMPLETION DATE** | **STATUS** |
| *Assign secretary, identify associate staffing needs, assign office space, coordinate transfer from current office to KDW* | *Human Resources, Facilities* | *Upon acceptance of offer* | |
| *Assign Advocate* | *Office Managing Partner* | *Upon acceptance of offer* | |
| *Identify Additional Lateral Integration Team Members (CFO, Office Managing Partner, Office Specific Administrator, Marketing and Recruiting)* | *Office Managing Partner* | *Upon acceptance of offer* | |
| *Coordinate meeting/conference call to discuss press release, bio and Marketing resources* | *Marketing* | *Upon acceptance of offer* | |
| **PHASE 1: In the first phase, the goal is to get the lateral partner in the door and up and running, make introductions and set targets and objectives.** | | | |
| **TASK** | **RESPONSIBILITY** | **PROPOSED COMPLETION DATE** | **STATUS** |
| Send Internal Welcome Email | Firm Managing Partner | Day 1 | |
| Send External and Internal Communication/Press Release Announcing Arrival | Marketing | Week 1 | |
| Orientation – Administrative (Benefits, IT, Library, Records) | Human Resources | Days 1-2 | |
| Welcome lunch with Advocate, Practice Group Chair, Office Managing Partner | Advocate | Day 1 | |
| Welcome reception to introduce new lateral partner to the department or office | Recruiting, Facilities | Week 1 | |
| Meeting with Secretary to discuss administrative processes (timesheets, opening new matters, transferring contacts) | Human Resources | Day 2 | |
| Meeting with Chief Financial Officer for Financial Management Training | Director of Finance | Day 3 | |
| Introductions to Firm Management (Firm Managing Partner, CFO, Executive Committee members) | Office Managing Partner, Advocate | Days 3-5 | |
| **Meeting with Advocate, Office Managing Partner, Practice Group Chair(s) and Marketing to identify cross-selling opportunities and the appropriate KDW partners to connect with to promote those relationships** | **Advocate, Office Managing Partner, Practice Group Chair(s), Marketing, Recruiting** | **Day 4** | |
| Reach out to identified KDW attorneys to schedule meetings | Recruiting, Office Managing Partner, Marketing | Day 8 | |
| Begin working with lateral to target key clients | Marketing | Day 9 | |
| Meeting with Professional Development to discuss training and CLE programs | Professional Development | Day 10 | |
| Formal introduction to fellow partners and associates at first available department meeting/lunch and monthly Firm Meeting | Practice Group Chair(s), Firm Managing Partner | Day 10 | |

# 100 Day Lateral Partner Integration Program
# PHASE 2

**PHASE 2: In the next phase, the integration program establishes a timeline for introductions and meetings for the lateral partner in his/her home office, as well as the other Kelley Drye offices. During this time the Advocate, the Office Managing Partner and the COO review the first financial reports to track the new lateral partner's progress to date. They meet with the lateral partner to identify successes and shortfalls. Marketing and Recruiting meet with the lateral partner and report back to the Advocate or Office Managing Partner regarding the progress of the integration program.**

| TASK | RESPONSIBILITY | PROPOSED COMPLETION DATE | STATUS |
|---|---|---|---|
| Meetings with KDW attorneys identified for cross-selling opportunities | Recruiting, Office Managing Partner, Marketing | Days 11-60 | |
| Meetings with clients | Lateral Partner | Days 11-60 | |
| Advocate and Marketing meets with lateral partner for status update on integration process | Advocate, Marketing | Day 15 | |
| Meetings with KDW attorneys in other offices identified for cross-selling opportunities | Recruiting, Office Managing Partner, Marketing | Days 21-60 | |
| Recruiting check-in for status update on integration process | Recruiting | Day 25 | |
| **Meeting with Advocate, Office Managing Partner and CFO to review one month financial report and to review progress of strategic meetings and cross-selling opportunities to date** | **Advocate, Office Managing Partner, CFO** | **Day 30** | |
| Advocate and Marketing meets with lateral partner for status update on integration process | Advocate, Marketing | Day 40 | |
| Recruiting check-in for status update on integration process | Recruiting | Day 60 | |
| **Meeting with Advocate, Office Managing Partner and CFO to review two month financial report and/or key statistics and to review progress of strategic meetings and cross-selling opportunities to date** | **Advocate, Office Managing Partner, CFO** | **Day 60** | |
| Meetings with additional KDW attorneys identified for cross-selling opportunities within lateral partner's home office | Recruiting, Office Managing Partner, Marketing | Days 61-100 | |
| Meetings with additional clients | Lateral Partner | Days 61-100 | |
| Meetings with additional KDW attorneys in other offices identified for cross-selling opportunities | Recruiting, Office Managing Partner, Marketing | Days 61-100 | |
| Advocate and Marketing meets with lateral partner for status update on integration process | Advocate, Marketing | Day 75 | |

# 100 Day Lateral Partner Integration Program
# PHASE 3

| PHASE 3: In the final phase of the integration program, the Advocate, the Office Managing Partner and the COO review financial reports and key statistics, as well as progress of strategic meetings and cross-selling to date. They meet with the lateral partner to identify successes and shortfalls. Firm Management receives a report on the status of the integration. Finally, the lateral partner will be asked to give his/her feedback on the integration program. | | | |
|---|---|---|---|
| **TASK** | **RESPONSIBILITY** | **PROPOSED COMPLETION DATE** | **STATUS** |
| **Meeting with Advocate, Office Managing Partner and CFO to review three month financial report and/or key statistics, and to review progress of strategic meetings and cross-selling opportunities to date** | **Advocate, Office Managing Partner, CFO** | **Day 90** | |
| Report to Firm Management on status of integration | Advocate, Recruiting, Marketing | Day 100 | |
| Request review of 100 Day Lateral Partner Integration Program – survey lateral partner | Recruiting | Day 100 | |
| ***6 months after start date*** | | | |
| **TASK** | **RESPONSIBILITY** | **PROPOSED COMPLETION DATE** | **STATUS** |
| **Meeting with Advocate, Office Managing Partner and CFO to review six month financial report, and to review progress of strategic meetings and cross-selling opportunities to date** | **Advocate, Office Managing Partner, CFO** | | |
| Report to Firm Management on status of integration | Advocate, Recruiting, Marketing | | |
| ***1 year after start date*** | | | |
| **TASK** | **RESPONSIBILITY** | **PROPOSED COMPLETION DATE** | **STATUS** |
| **Meeting with Advocate, Office Managing Partner and CFO to review first year financial report, and to review progress of strategic meetings and cross-selling opportunities to date** | **Advocate, Office Managing Partner, CFO** | | |
| Report to Firm Management on status of integration | Advocate, Recruiting, Marketing | | |
| CFO reports to Executive Committee on financial results for lateral partner, including a summary of billings and collections | CFO | | |
| Meeting to discuss possible firm citizenship roles (committees, etc.) | Firm Managing Partner | | |
| Formulate Internal Business Plan (see tab 4) following the first full year at KDW | Advocate, Lateral Partner | | |

## INDIVIDUAL PARTNER BUSINESS PLAN*

***this template or a substantially similar form will be completed following the first full year at the firm***

**Lateral Partner Name:**

**Advocate:**

**Office:**

**Office Managing Partner:**

**Primary Practice Group(s):**

### 2025 Performance

1. What are you most proud of accomplishing in your practice or otherwise at the firm in 2025?
    - Click to reference a report of your most substantial matters.
2. Identify new clients that you originated and how you successfully landed the work.
3. Identify other partners who materially contributed to the engagement of any NEW clients where you are the relationship partner. Please provide specific client examples and the contributions of the other partners.
4. Identify partners who have materially assisted developing, managing, or expanding the volume and nature of work for an EXISTING client(s) where you are the relationship partner. Please provide specific client examples and the contributions of the other partners.
5. Describe how you helped another partner(s) originate new clients or expand work from existing clients in 2025. Include the name of the client, your role, and the participation of others in getting the work.
6. Did you meet or exceed productivity expectations set by the firm for 2025? If not, please explain why you fell short and what specific actions you are taking to increase productivity in 2026.
7. Did you achieve your goals for other economic metrics (e.g., revenue generation, fees collected on time, realization, rate increases) of your practice? If so, please describe the key factors leading to your success. If not, please explain what steps you will take to improve in 2026.
8. What are your revenue and billable hour goals that you plan to meet this year to improve profitability?
9. Comment on your role as a firm citizen, including involvement in firm management, billing and collections, recruitment and training, mentoring, pro bono, and non-firm activities. Are there any committees on which you would like to serve?
10. Which of our partners and special counsel would you like to give a shout out?

**Client Service and Business Development**

11. What legal, regulatory, or business trends are you tracking relevant to your practice, and how do you plan to capitalize on or protect against those trends? Describe if and how you use firm technology or resources to help you with that tracking.

12. Describe your plan to deepen existing client relationships and cultivate new ones. How will you leverage your team's strengths, cross-practice collaboration, and industry knowledge to pursue those opportunities? Refer to the DealCloud CRM for client relationship intelligence.

| Company | Main Contact(s) | Opportunity Areas and Goals | Key Team Members and Collaboration Approach | Next Steps |
|---|---|---|---|---|
| | | | | |
| | | | | |
| | | | | |

13. Describe your business development and marketing goals and tactics, not otherwise noted above. Include in your description if there are any new initiatives that you plan to do (or do more of) as compared to the prior year.

| Marketing Tactic | Goal and Prior Results (if applicable) | Cost |
|---|---|---|
| | | |
| | | |
| | | |

## 100 Day Lateral Partner Integration Program
## GLOSSARY

**Accounting and Finance – Scott Gutterman, Chief Financial Officer (firm wide)**

Responsible for the accounting and financial operations of the firm, the Accounting and Finance Department serves as your point of contact on client and matter maintenance, best practices in billing and collections, how to effectively price services and how to introduce alternative pricing scenarios. In addition, Accounting and Finance can offer an overall awareness of profitability, providing the tools, reports, resources and information sources that can be utilized in the management of one's practice and the metrics the firm uses to measure financial success.

**Advocate**

Each lateral partner is assigned an Advocate who partners with them to take ownership of the lateral partner plan and integration actions and jointly monitor the progress.

**Department Heads/Practice Group Chairs**

Advertising and Marketing – Donnelly McDowell (DC)
Antitrust and Competition – William MacLeod (DC)
Bankruptcy and Restructuring – Jason Adams (NY)
Communications – Tom Cohen (DC)
Corporate – Tim Lavender (CH)
Employee Benefits and Executive Compensation – Pamela Kaplan (NY)
Energy – Wayne D'Angelo (DC)
Environmental Law –John Gilmour (TX) and Wayne D'Angelo (DC)
Georgetown Economic Services – Grace Kim (DC)
Government Relations and Public Policy – Dustin Painter (DC) and Dana Wood (DC)
India – Deepak Nambiar (NY)
International Trade and Customs – John Hermann (DC)
Labor & Employment – Mark Konkel (NY)
Litigation – Mike Lynch (NY)
Patent – Steve Yovits (CH)
Real Estate – Deron Green (NJ) and Dean Loventhal (NY)
Tax – Jack Miles (NY)
Trademark and Copyright – Andrea Calvaruso (NY)
White Collar Crime & Investigations – Matt Luzadder (CH) and Sandy Musumeci (NY)

**COO – Ralph Allen**

**Facilities Department – Jeanne Wessely, Director of Facilities (NY)**

The Facilities Department handles New York office space, including reservations for visiting offices, office furnishings, maintenance, conference rooms, catering, mailroom and copy center, construction, office moves, supplies, security, HV/AC, Fire Safety, vending machines, and car services. The Facilities Department also handles printing of business cards and letterhead for all offices excluding Washington, DC, where requests are handled by Human Resources.

**Firm Managing Partner – Dana Rosenfeld**

**Human Resources – Kirsten Sechler, Chief People Officer (firm-wide); Claudia M. Baragaño, Director of Operations and HR (DC)**

The Human Resources Department provides service to the legal and administrative staff of Kelley Drye & Warren. HR will respond to questions, requests and concerns in a timely manner and maintain the confidentiality of all personal information that may be shared.

**Marketing – Kate Stoddard, Chief Marketing Officer (firm wide); Annemarie Donovan, Director of Business Development (NY); Laurena Liu, Director of Marketing and Communications (DC)**

The Kelley Drye Marketing Department offers a full range of marketing and business development services, including helping attorneys prepare for client meetings/pitches; promoting attorneys and their expertise through various outlets such as third-party commentary, speaking engagements, publications and news releases; managing the content provided in the firm's promotional materials, as well as updating practice profiles, and formatting client advisories for distribution to current and prospective clients; assisting in the management and creation of events from dinners to golf tournaments, as well as the organization of CLEs and seminars for the firm's clients; managing the content and design of all Kelley Drye digital marketing properties including kelleydrye.com, firm blogs, podcasts and social media accounts; and designing and distributing the firm's internal newsletter.

**Office Managing Partners and Administrators**

| Office | Office Managing Partner | Office Administrators |
|---|---|---|
| Chicago | Matt Luzadder | Liz Summers, Office Administrator<br>Nikki Raiman, Director of Attorney Recruiting |
| Los Angeles | Becca Wahlquist | Liz Summers, Office Administrator<br>Nikki Raiman, Director of Attorney Recruiting |
| New York | Rob Steiner | Stephanie Casker, Director of Legal Recruiting |
| Parsippany | Paul Keenan | Audrey Serban, Office Administrator<br>Stephanie Casker, Director of Legal Recruiting |
| Stamford | Jennifer Bedoya | Audrey Serban, Office Administrator<br>Stephanie Casker, Director of Legal Recruiting |
| Texas | Kenny Corley | Rhonda Waldrip, Office Administrator<br>Nikki Raiman, Director of Attorney Recruiting |
| Washington, DC | Laura Van Druff | Suzanne Gralow, Director of Administration – DC<br>Stephanie Casker, Director of Legal Recruiting |

**Professional Development – Cali Mazzarella, Director of Professional Development (firm wide)**

The Kelley Drye Professional Development Department coordinates in-house training programs and mentor programs. The Professional Development staff assist attorneys in tracking their mandatory CLE requirements.

**Recruiting – Stephanie Casker, Director of Legal Recruiting (NY); Nikki Raiman, Director of Attorney Recruiting (LA)**

The Kelley Drye Recruiting Department administers all efforts toward hiring lateral partners and associates, working closely with Kelley Drye attorneys, law schools and legal search firms to attract the best and brightest talent to the firm.

**100 Day Lateral Partner Integration Program**
**MARKETING DEPARTMENT**
**Lateral Integration Program Checklist**

| Project | Task | Responsibility | Deadline | Status |
|---|---|---|---|---|
| **Planning Call** | Welcome and planning call with lateral partner | Practice Development Manager (BDM) and PR team | | |
| **Internal Communication** | Distribute welcome email to all personnel | BDM draft for Dana Rosenfeld to send | | |
| **Bios** | Draft bio | BDM | | |
| | Secure approval from lateral partner, including what practice(s) his/her web bio should be linked to. This should be approved by the chairs of those respective practices. | BDM | | |
| | Approve bio | Director of Practice Development, Practice Group Leader | | |
| | Photo – schedule session with photographer | BDM | | |
| | **Post bio on the web** | Marketing | | |
| **Press Release** | Draft release | BDM and PR team | | |
| | Review/edit release | Dana Rosenfeld and Office Managing Partner | | |
| | Secure approval from lateral partner | BDM | | |

| | | | | |
|---|---|---|---|---|
| | Update media list – Ask lateral partner if he/she has any media contacts and what hometown newspapers, law school alumni newsletters, association and industry newsletters should receive the release | BDM and PR team | | |
| | Coordinate media outreach with external PR firm | PR team | | |
| | **Distribute press release**<br>Send to custom media list and post release on KDW website home page.<br>Share on firm social media, blogs, and newsletters, as appropriate. | PR team | | |
| | Field calls from the media | PR team | | |
| **Contacts** | Import lateral partner's contacts into Outlook and into our email distribution application | Marketing | | |
| | Update information on alumni directories, organization membership rosters and other places, including LinkedIn and other networking websites | BDM/Secretary | | |
| **Announcement Cards/Email to send to Lateral Partners' Contacts** | Draft announcement email once picture and bio are done and approved | BDM | | |
| | Layout in print and HTML email format | Marketing | | |
| | Review/approve | Director of Practice Development | | |
| | **Distribute announcements by email and mail** | Marketing | | |
| **Announcement Letter from Partners** | **Distribute announcement internally for partners to share with their contacts** | Marketing | | |

| | | | | |
|---|---|---|---|---|
| **Update Practice Group Descriptions** | Make updates to practice group descriptions, including lateral partners' matters he/she worked on prior to KDW | BDM | | |
| | Edit and approve descriptions | Practice Group Chair(s) and lateral partner | | |
| | Post to the web | Marketing | | |
| **Awards and Recognition** | Review *Chambers*, *Super Lawyers*, and other directories and awards and advise them of lateral partner's move to KDW. | BDM | | |