Law firm exclusive:

onboarding checklist

cognology

onboarding, performance
and learning software

Did you know?

67% of law firms rate recruitment as HR's top challenge

Even law firms are not immune to clients shopping around for a better deal.

An Association of Corporate Counsel (ACC) survey revealed a third of companies stopped using at least one law firm last year for failing to meet expectations. 82% took their business to another firm, while another 15 per cent brought it in-house.[1]

Clients want more from their law firms

In the 10 years post GFC, the legal industry experienced a strong shift towards clients seeking better value for money and more certainty around costs. In 2018, fees and expenses are still a high priority for clients, but their expectations andwhat they want from their legal advisor has changed significantly.

It's probably fair to say that most clients aren't interested in case law. Neither are they impressed by their lawyer's grasp of latin. What they do care about is having an expert that not only understands the law, but also understands their business. A strategic partner offering proactive advice and guidance to future-proof and protect their interests.[2]

The link between client and staff turnover

One of the drivers behind clients switching providers is thought to be the constant movement of staff between firms. When key talent moves, continuity of service is interrupted and the business relationship is compromised. In some instances, rather than wait for new counsel to get up to speed, clients choose to follow practitioners to their new firm.

This revolving door of talent is an industry wide problem. Seventy one percent (71%) of law firms indicate that they struggle with retention. And with a shortage of experienced mid-level talent across key practice areas in the market, it is no surprise that 67% of firms rate recruitment as HR's top challenge.[3]

So what can law firms do to improve retention, as well as retain their clients after a staff member leaves?

Staff onboarding improves client outcomes

Onboarding reduces many of the challenges associated with turnover that can be damaging to business.

Gets new hires up and running faster

As discussed in **Cognology's Guide to a Great Onboarding Process,** onboarding equips new staff with the skills, knowledge and confidence to be more productive, faster. Through a series of interactive formal and informal training, coaching, information sharing, goal setting, feedback, networking and social interventions, new staff better understand what part they have to play in delivering high levels of service to clients. The more tailored and personalised the onboarding program, the faster a new practitioner can be up and running and meeting (or even exceeding) client expectations.

Increases retention (prevention is better than the cure!)

We often only think about onboarding in terms of the staff member's first few days or weeks with a company, but its influence is more far reaching than that. In fact, 69% of employees are more likely to stay with a company for at least three years after a great onboarding experience.[4]

Increases efficiency and reduces costs (so you can stay competitive)

Time is money, so best practice onboarding is designed with very little downtime. It also prioritises learning activities that boost productivity and performance so new hires can contribute in their role earlier.

A great way to increase onboarding efficiency is to automate. The right software solution can bring all administrative tasks (from employee forms through to IT requests) into one system and begin the induction process in the days or weeks before a new hire even starts with the company. This means new lawyers don't waste valuable time filling in forms or waiting for computers and phones, and labour intensive data entry and inputting tasks become a thing of the past for HR.

Onboarding checklist - how does yours compare?

Want to get more out of your onboarding process? Check out Cognology's sample checklist especially for the legal industry.

Legal Industry Onboarding Checklist
Employee Welcome Pack

Preboarding Welcome
- [ ] Welcome message
- [ ] Confirm start date and time, parking, dress code
- [ ] Staffing announcement

Employment Documentation
- [ ] Employment contract
- [ ] Bank account details
- [ ] Fair Work Information Statement
- [ ] Job description
- [ ] Tax File Number Declaration
- [ ] Choosing a Super Fund Form

History Checks (role specific)
- [ ] Reference checks
- [ ] Educational qualifications (Bachelor of Law or equivalent, Post Graduate Specialisations)
- [ ] Proof of admission to the Roll of Lawyers in practising state
- [ ] Proof of admission to the Bar in practising state (Barristers)
- [ ] Criminal history check
- [ ] Visa/passport work rights validation
- [ ] Medical check
- [ ] Drug & Alcohol Testing

Provisioning
- [ ] System access
- [ ] Keys/security passes
- [ ] ID photo
- [ ] Staff handbook
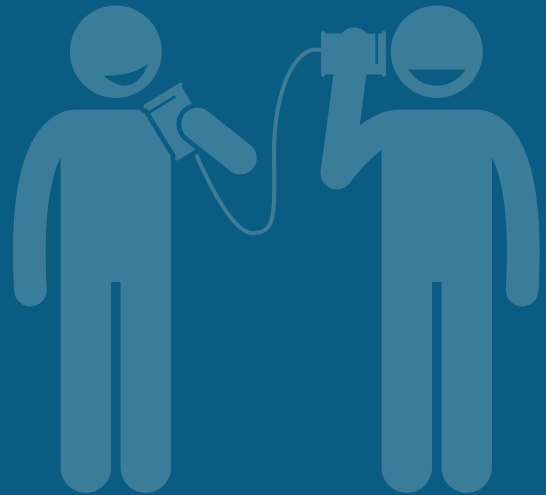
Socialisation and Culture

Introductions
- [ ] Meeting with Supervisor
- [ ] Meet the leaders
- [ ] Introductions to team
- [ ] Introduction to buddy
- [ ] Introduction to clients

Introductions (continued)

- [ ] Tour of the facilities
- [ ] Intranet profile

Support Mechanisms

- [ ] Buddy system
- [ ] Professional mentoring program
- [ ] Peer support networks
- [ ] Online resources

Working Arrangements

- [ ] Rosters
- [ ] Breaks
- [ ] Absences
- [ ] Timesheets/Sign-in and Sign-out procedures
- [ ] Billing procedures
- [ ] Resources and general supplies

Social

- [ ] Social club activities
- [ ] Birthdays and anniversaries
- [ ] Special events
- [ ] Industry events/groups
- [ ] Staff morning teas and dinners

Strategic Framework

- [ ] Vision and mission
- [ ] Values
- [ ] Core philosophies
- [ ] Code of conduct
- [ ] Legal Ethics
- [ ] Products and Services offered by the firm

Communication

- [ ] Weekly notices
- [ ] Emails
- [ ] Intranet
- [ ] Peer networks and collaboration
- [ ] Meetings
- [ ] Staff directory and phone numbers
- [ ] Client newsletter
- [ ] Surveys

Performance

Onboarding Plan

- ☐ Review and refine onboarding plan with supervisor
- ☐ Set check-in dates
- ☐ Leadership contact (Partner)

Performance Management

- ☐ Clarification of expectations and responsibilities
- ☐ Goal setting
- ☐ Probation review
- ☐ Ongoing performance management
- ☐ Career discussion
- ☐ Disciplinary procedures

Continuing Professional Development

- ☐ Computer based modules
- ☐ External training/seminars
- ☐ Study support for postgraduate study
- ☐ Internal opportunities

Compliance

State Based Laws Governing the Legal Profession

- ☐ ACT - Legal Profession Act 2006
- ☐ NSW - Legal Profession Uniform Law Application Act 2014
- ☐ NT - Legal Profession Act (NT)
- ☐ QLD - Legal Profession Act 2007
- ☐ SA - Legal Practitioners Act 1981
- ☐ TAS - Legal Profession Act 2007
- ☐ VIC - Legal Profession Uniform Law Application Act 2014
- ☐ WA - Legal Profession Act 2008

State Based Regulators of the Legal Profession

- ☐ ACT Law Society
- ☐ NSW Office of the Legal Services Commission
- ☐ Law Society of Northern Territory
- ☐ QLD Legal Services Commission
- ☐ Legal Profession Conduct Commissioner of South Australia
- ☐ Legal Professional Board of Tasmania
- ☐ Victorian Legal Service Board & Commission
- ☐ WA Legal Practice Board

Industry Bodies (As relevant)

- ☐ Australian Law Reform Commission
- ☐ ALPMA - Australasian Legal Practice Management Association
- ☐ Law Council of Australia
- ☐ State based bodies

Health and Safety Framework

- ☐ Work health and safety policy
- ☐ Work health and safety system
- ☐ Health and safety committee
- ☐ Health and safety representative
- ☐ First aid officers
- ☐ Fire/emergency wardens

Health and Safety Reporting Requirements

- ☐ Risk assessments
- ☐ Accident and incident reports
- ☐ Non-conformance reports
- ☐ Notification of communicable diseases
- ☐ Hazard reporting
- ☐ Workers compensation claims

Location of Emergency Facilities and Equipment

- ☐ Fire extinguishers, hoses and blankets
- ☐ First aid facilities - first aid kit and room

Hazard Specific Safety Training

- ☐ Manual handling techniques
- ☐ Use of fire equipment

Policies and Procedures

- ☐ Fit and proper requirements for responsible persons
- ☐ Ongoing professional development requirements
- ☐ Smoke-free workplace
- ☐ Alcohol and other drugs
- ☐ Prevention of workplace bullying and harassment
- ☐ Use of information and communication technology (including mobile phones)
- ☐ Social media
- ☐ Discrimination and sexual harassment
- ☐ Diversity and inclusion
- ☐ Workplace rehabilitation
- ☐ Leave applications

Policies and Procedures (continued)

- [ ] Employee separation
- [ ] Emergency plan including assembly points, exits and procedures
- [ ] Provision of first aid
- [ ] Staff grievance procedures
- [ ] Disputes resolution - customer complaints and concerns
- [ ] Responding to media enquiries
- [ ] Employee Assistance Program (EAP)

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