CHECKLIST FOR LAWYERS JOINING A FIRM

Whether you are joining a firm as a new lawyer out of law school or as a lateral transfer, you have some considerations when you make the move. Knowing what to anticipate can help prepare you for a smooth transition. Use this checklist to assess potential issues and track your progress.

1. Take your conflict list – If you're making a lateral move, make sure to bring all your conflicts of interest with you. Ask your old firm to provide you with a list of all the cases you worked on, including the clients' and opposing parties' contact details, as well as other relevant information necessary to perform a conflicts check. See the PLF practice aid, Conflict of Interest Systems and Procedures (page 6) for more information to include in your conflict list, available at osbplf.org > Services tab > CLE & Resources > Practice Aids > Conflict of Interest.
2. Update your contact information with Oregon State Bar – Communicate your change of information to the Bar once you know your start date and confirm the updated listing in the OSB directory.
3. Understand the expectations – Review your new employer's policies regarding billable hours, in-office and remote work requirements, and other expectations. If these policies are in writing, ask the administrator to get a clear understanding of what is expected of you.
4. Go to the office – Many law practices offer a hybrid work schedule. As a new attorney at the firm, try to go into the office as often as possible to familiarize yourself with the firm's culture, develop relationships with your legal support team, and learn from your supervisor and colleagues.
5. Transfer your conflict list – Provide your conflict list to your new firm to incorporate into their system or software. Get proper training on how they screen for conflicts to ensure you follow their procedures.
6. Transition active files – If you are taking any clients with you, follow your new firm's procedures to transition files and lawyer trust account funds, if any. Ensure that any upcoming deadlines are incorporated into the new calendaring system. The clients will need to sign a new fee agreement.
7. Familiarize yourself with the firm's technology – Take time to learn how to properly use your new firm's software programs and equipment. If formal training is not provided, ask your supervisor or support staff for a demo or tips on using their technology and any limits on usage.
8. Understand the organization and operations – If you're joining a medium or large law firm, ask for an organizational chart, a map of the office, and any documents to help you understand the chain of command and various roles within the firm.
9. Learn the office systems – Implement your new firm's systems and procedures for opening, managing, and closing files. Ask support staff to help you learn unwritten procedures and protocols, such as processing mail, communicating with others, and miscellaneous details that keep the practice running.
10. Properly delegate and supervise – If you have support staff, know what tasks can and cannot be delegated. Properly supervise staff to ensure documents prepared by them are accurate and up-to-date. If you're sharing staff with other lawyers, establish an arrangement or routine that works for everyone. Regularly communicate with your staff regarding work schedules, upcoming tasks, and deadlines.
11. Develop relationships – Take time to get to know your colleagues. The investment you make in building connections with people in your new workplace could have a major impact on

your happiness and success at the firm. Lay the foundation by committing to face time in the office, participating in firm events and activities, volunteering and collaborating, and being willing to put yourself out there.

12. Take the initiative – If you have a concern or issue, reach out to your managing attorney without waiting for others to approach you first or offer assistance. Take the initiative to follow up, request clarification, and ask questions to help you learn and improve. Be proactive in asking for feedback on your work and be receptive to constructive criticism.

13. Master the learning curve – If you're handling cases in a new practice area, utilize all resources both inside and outside of the organization to gain competency. Keep in regular communication with your managing attorney and apprise them of your projects' status, along with any challenges you're facing. Ask colleagues for advice on getting up to speed in your new practice area and malpractice traps to avoid.

14. Find a mentor – Identify someone in your new firm whom you admire and trust for advice and guidance on your professional growth and development. Finding a mentor requires meeting different people and developing ongoing relationships, so invest time in activities where you can meet people outside your immediate circles at work.

15. Stay engaged – It can be easy to isolate if you're working primarily remotely. Make an effort to stay engaged in your legal work as well as the firm culture. One way to remain interested and committed is to set goals for yourself, whether big career aspirations, business development milestones, or accomplishments in a particular legal matter. Goals provide clarity, focus, and direction as you navigate your role in the new firm.

16. Seek support – Transitioning to a new role can be difficult and stressful. If you need personal or mental health support, please reach out to the Oregon Attorney Assistance Program (oaap.org) (503.226.1057). Their services are free and confidential.

Additional Resources:

- Checklist for Departing Attorneys, available on the PLF website, osbplf.org. Click on Services tab > CLE & Resources > Practice Aids > Departing a Firm > Checklist for Departing Attorneys.
- Checklist for Closing Your Law Office, available on the PLF website, osbplf.org. Click on Services tab > CLE & Resources > Practice Aids > Closing a Law Office > Checklist for Closing Your Law Office.
- Conflict of Interest Systems and Procedures, available on the PLF website, osbplf.org. Click on Services tab > CLE & Resources > Practice Aids > Closing a Law Office > Checklist for Closing Your Law Office.
- Working Remotely Toolkit, available on the PLF website, osbplf.org. Click on Services tab > Toolkits > Working Remotely.
- Success Tips for Joining A Firm Part I, CLE available on the PLF website, osbplf.org. Click on Services tab > CLE & Resources > CLEs > Success Tips for Joining A Firm Part I.
- Success Tips For Lawyers Joining Firms (Part II), CLE available on the PLF website, osbplf.org. Click on Services tab > CLE & Resources > CLEs > Success Tips for Joining A Firm (Part II).
- Plugging The "Knowledge Drain": How To Retain Knowledge To Ensure Your Firm's Continued Success, available on the PLF website, osbplf.org. Click on Services tab > Blogs > *in*Practice.
- Welcome, New Lawyers: A Conversation with PLF Claims Attorney Bradley Tompkins About Avoiding Malpractice, available on the PLF website, osbplf.org. Click on Services tab > Blogs > *in*Practice.

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IMPORTANT NOTICES