

Peer Liaison Guidelines

The Peer Liaison's role is to assist the new associate with integration into the firm during the two years. You can do this by welcoming the new associate into the firm, sharing tips and lessons learned, and generally offering the type of support you had or would like to have had as you began your legal career.

We offer the following as loose guidelines; please modify as you see fit.

BUDGET

Peer Liaisons shall be provided a budget to be used on out of office meals and coffee with the Associate. Peer Liaisons shall utilize the budget in a manner that best accommodates the Associate's interests and facilitates active discussion. Peer Liaisons and Associates are expected to utilize the entire budget over many meetings (with each meeting not to exceed \$50.00). If the Peer Liaison/Associate needs additional funds for the Peer Liaison pairing, additional funds can be requested.

Your time should be tracked using Professional Development 0000099.041000;

To seek reimbursement for Peer Liaison-related expenses, please submit your receipts through **Expense Manager**. GL Code 8061-[office]-114 // Purpose: Attorney Mentoring and Integration.

FIRST DAY

Meet with the Associate over lunch.

Describe your role as a Peer Liaison and ask the Associate if there is anything particular that he/she would like your assistance with.

Peer Liaison discussions may touch on issues that either or both parties want to keep confidential. While such requests generally can be respected, there may be situations in which it is necessary to disclose certain information, on a need-to-know basis only, with others in the Firm. Discuss general questions the associate may have about the firm or practice group.

Let the Associate know that he/she can speak with you about anything, including firm politics, what to do when they make a mistake, etc.

Inform the Associate that you are available to answer questions including but not limited to time entry, handling workload, legal research costs, firm economics, billable hours, expensing meals, pro bono, or clarification of assignments.

Inform the Associate that you will be helping to review their time entries for the first week and reviewing their first work product before submission.

Inform the Associate that you are reviewing his/her billable hours and other relevant financial metrics (i.e. EFC) on a monthly basis but only for the purpose of explaining the metrics and identifying any pitfalls/problem areas (not to get the associate into trouble if they are falling behind).

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FIRST TWO WEEKS

Check in with the Associate at least every other day, with one longer meeting over coffee each week.

Introduce the Associate to other associates in the office/practice group. If you are not in the Associate's practice group, please introduce the Associate to an associate who is and who will agree to answer practice-group specific questions when they arise and address the practice group specific items listed in this document.

Explain the importance of understanding firm economics and billable/non-billable hour expectations. Provide resources and people to contact for additional information.

Discuss working with an assistant and paralegals.

Discuss how to get feedback from partners and senior associates.

Discuss any unwritten rules and guidelines—e.g., the best time to get in to see the PIC, PGC or other departmental leaders, expectations of attendance or participation at firm/departmental events.

Explain best practices for legal research, including free research resources (if this is relevant to his/her practice area).

Explain your best practices for finding and managing workload (if there isn't a practice group work flow coordinator).

Review your time entry narrative best practices; review associate's time entry and provide comments.

Review first brief, memorandum, or other work product and provide comments before Associate turns it in.

MONTHS 1 – 2

Have lunch once a month with the Associate.

Advise on office and/or practice group meetings the Associate should attend and any corresponding information he/she should have in preparation.

Where feasible, escort the Associate to meetings/events and make introductions.

Discuss how practice group meetings and events within the practice group are communicated.

Introduce the Associate to lawyers in other practice groups, including Practice Group Chairs.

Encourage the Associate to attend other practice group meetings to help make connections.

Check to see if integration is going well.

Review the Associate's billable hours and other relevant financials. Discuss any concerns/questions regarding workload with associate.

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MONTHS 3 – 6

Have lunch once a month with the Associate.

Review Practice Group Guidelines for first year of practice with eye towards promotion to Step 2.

Offer to help the Associate prepare Career Development Plan.

Explain the importance of understanding the associate compensation structure, including bonuses and associate evaluation criteria. Provide resources and people to contact for additional information.

Review the Associate's billable hours and other relevant financials. Discuss any concerns/questions regarding workload with the Associate.

Discuss firm or practice group specific retreats (e.g. meeting specific partners that may have work; attending specific panels/trainings).

Explain pro bono hourly expectation and if not already working on a pro bono project, recommend that the Associate contact DWT's Pro Bono Administrator, Julie Orr, who can help the associate find an appropriate pro bono project.

MONTHS 6 – 12

Have lunch once a month with the Associate.

Check-in regularly. Continue to look for signs of frustration and determine how you can help.

Continue to assist the Associate in making connections with senior lawyers.

Continue to monitor the Associate's billable hours and other relevant financials. Discuss any concerns/questions regarding workload with the Associate.

Encourage the Associate to take advantage of any training opportunities and to utilize West LegalEdCenter and PLI on Professional Development's portal for training and CLE opportunities.

Ensure the Associate understands attorney compensation and year end evaluations/review process.

Explain the importance of completing annual self-assessment and provide resources and people to contact for additional information about the evaluation process.

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SECOND YEAR, MONTHS 1 – 6

Check-in once a month over lunch or another meal. Continue to look for signs of frustration and determine how you can help. Regularly discuss workflow to ensure that associate is busy but not overworked.

Review Practice Group Guidelines for second year of practice with eye towards promotion to Mid-Level.

Offer to help the Associate prepare career development plan.

Review how to best utilize firm or practice group specific retreats (e.g. meeting specific partners that may have work; attending specific panels/trainings).

Identify additional partners that the Associate may target for work, and explain best practices for seeking work from new partners.

Check-in to see if the Associate has any pro bono projects and is in line with firm's pro bono expectations. If the Associate has any questions or wants to get involved with a pro bono project, recommend that the associate contact DWT's Pro Bono Administrator, Julie Orr, who can help the Associate find an appropriate pro bono project.

SECOND YEAR, MONTHS 6 – 12

Check-in once a month over lunch or another meal. Continue to look for signs of frustration and determine how you can help. Regularly discuss workflow to ensure that the Associate is busy but not overworked.

Ensure the Associate understands attorney compensation and year end evaluations/review process. If the Associate has any questions, provide resources and people to contact for additional information.

Ensure the Associate understands the importance of completing a self-assessment and provide resources if he/she has any questions about the evaluation process.

Discuss business development and importance of maintaining connections from law school and other groups.

Explain your business development practices.

Discuss relevance of bar association or other groups that may benefit the Associate

Discuss importance of building Associate's own brand internally and externally, including preparation of client alerts, presentations, and articles.

Review the Attorney Utilization Reports and Attorney Credit Reports at least once with the Associate. If you need help explaining the contents, ask your Professional Development Partner, PIC or another partner you trust for an explanation first.