Get Onboard

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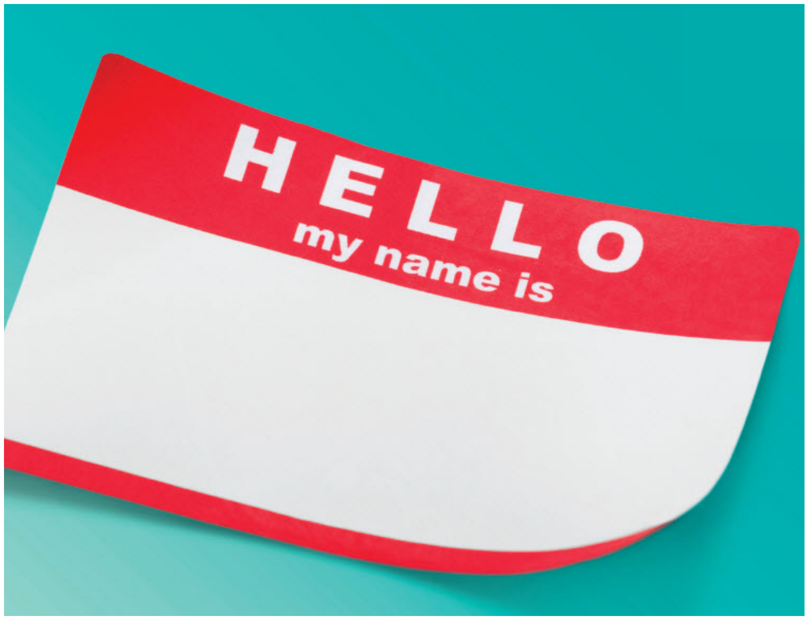


Training a new employee remotely may seem daunting. Here are some tips from both the employer and the employee perspectives for making that process smoother.

When our firm hired a new associate in early 2020, we didn't expect to do so virtually—nor did we expect to be transitioning our entire team to a fully remote setting days before she was supposed to start. How were we supposed to onboard remotely? We made a tough call to delay her start date by at least three weeks to focus on transitioning the team, working out any tech kinks, and determining how to onboard in a remote world.1

Luckily, the infrastructure was already in place so anyone could work from anywhere. We have three physical offices, and we use cloud-based technology that allows our offices to work seamlessly together. These systems include web-based case management, QuickBooks, Office 365, and cloud-based storage. (For more on firm tech, see p. 18.) Our assistants also have desktop scanners so they can process physical mail into our cloud-based storage system the same day it arrives. These basics became the skeleton of a successful remote office environment.

But technology wasn't the only key to virtual onboarding. We determined that we wanted to focus on three distinct areas to get our new associate up to speed: observation, communication and collaboration, and research and education.

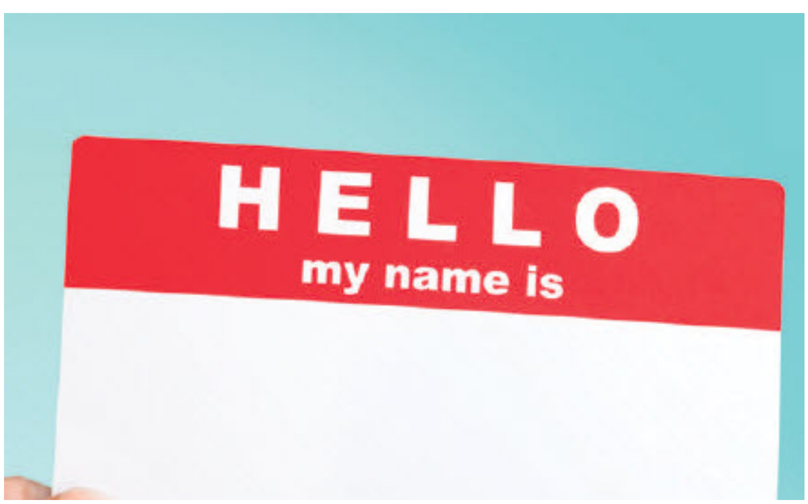
Even in a normal in-office world, a thoughtful process for onboarding a new employee may get lost in the daily crunch of urgent tasks that our cases require. But it's critical to help a new hire start off right. Here are some tips we learned—as the employer and the new employee—that can make onboarding (remotely or in person) more efficient and productive.

Prepping for the First Day

Miranda (employer): Ordinarily, on the first day, we have the new associate's workspace set up and a list of files or projects to jump into. We would introduce new hires to everyone in the office, take them to lunch, and fill their calendar with opportunities to observe how our firm operates. As the week progresses, new associates sit in on as many initial client consultations as possible to learn our process. As every seasoned attorney knows, regardless of prior experience, every new associate requires a lot of guidance in those first few weeks. Sometimes our hectic schedules don't allow for enough of that guidance, so we would send them traveling to observe and hopefully learn something from each observation.

In the remote world, using our cloud-based network while working from home made this process more efficient. First, we set up the new associate's credentials for Office 365 and our case management software, Clio. We sent our policies and procedures, as well as helpful resources for our practice, before her start date if she wanted to review them ahead of time. We coordinated for her to pick up her laptop and credentials the week before starting—this allowed her a little extra time to start figuring out our system before she was expected to tackle projects. Having everything set up early is even more important to overcome the challenges of a remote world and help ensure a seamless onboarding process.

Consider giving these tools to your new employees ahead of time, so they can review everything, familiarize themselves with your systems, and have any questions addressed before they face the pressure of their first day.



Open communication is key, no matter the environment. New employees must feel comfortable asking questions in real time so they can course-correct if needed.

Danielle (employee): My previous firm used a virtual private network, which would have worked for remote onboarding too, but the cloud was extremely easy to use. When I opened my new laptop, my first few assignments were already in my email, meetings were on my calendar, and training materials were bookmarked for me.

Observation

Miranda: Early on in the pandemic, we had daily meetings in the morning and afternoon so our attorneys could keep in touch remotely, discuss goals and accomplishments for the day, and problem-solve generally. Invite any new employees to all regular meetings right away. Especially when remote, participating in these lets them develop a camaraderie with the team, learn the firm's dynamic, and see what types of issues they likely will encounter. Have a meeting with your entire administrative staff so new employees can meet everyone they will be working with on a daily basis. Make your new hire part of the team from day one.

Also take time to have non-work chats to help people get to know each other in less formal settings—especially when they can't meet more casually for lunch or coffee in person. If your office is in a hybrid setup with some people in the office and some people remote, don't forget about new hires just because they are at home—treat them like they're in the office.

Have new employees "shadow" others, even for seemingly mundane administrative tasks or tasks that they will not be working on just yet. This will help them fully understand how your firm handles a particular task and also get them up to speed on cases more quickly. Whether it's an initial client meeting, expert meeting, prep appointment, or deposition, invite new employees to observe.

This is particularly easy to do when you are working remotely and using videoconferencing software: When someone's video is off, they are often out of sight and out of mind so you don't overwhelm a client or witness with too many people on video. While we will still encourage regular in-person observation and discussion when things return to normal, we have learned that not being able to travel or meet in person should not be a barrier to regular observation and opportunities for growth.

Encourage associates to prepare for their observations as if they are handling the appointment, deposition, or hearing themselves—including making outlines or preparing an argument. They need to go through the thought process of how they would handle the situation. How would they argue the matter? What questions would they ask the witness? This helps engage the observer and also makes the observation process more effective and leads to more useful discussion during the debrief.

When the observation begins, always introduce the new hire to the client or opposing attorney initially, and then explain that he or she will be on mute with the video off, just observing. But don't stop at observation—engage new hires. Take a break to check in with them to see if they have any feedback or questions for the witness. They are another set of eyes and ears and may have picked up on something that you missed. At the end of the observation, check in and debrief about what just happened and discuss any learning opportunities they had.

Danielle: When the day came to join my first Zoom meeting with every attorney in the office, I was anxious to say the least. I was worried about how I would form relationships and how I would pick up on whether I was performing to expectations. When I signed on, I was met by friendly banter— everyone was recapping their weekend and sharing stories until it was time to start. This was a fantastic insight into who I was going to be working with and set a great tone for the week.

After our team meeting, I stayed on Zoom with a partner. We made a plan for my day—I would observe her depositions and deposition prep, and she would share her screen with me when she was processing her mail. We spent lots of time screen sharing and constantly touching base that first week. Watching her screen-shares allowed me to see exactly how she was getting everything done. I found myself navigating the platforms much faster than I expected, and I was very comfortable asking questions.

Checking in after observing my first few mediations was particularly helpful, as I was trying to determine when it's best to walk away. During the debrief, I was always asked, "What did you learn?" I found that simple question forced me to think critically and take away more from the experience than I would have if I merely observed without the discussion afterward.

Miranda: One advantage of video meetings is that new employees can observe everything being done via Zoom each day. Rather than tagging along with one particular attorney for the day, new employees can hop from attorney to attorney throughout the day, mixing up their exposure to depositions, arbitrations, hearings, mediations, and more. This gives employees far more comprehensive exposure to things than they would normally get in the same amount of time.

We have been working in a hybrid setting for most of the pandemic. Whether an attorney is remote or in the office, the schedule and opportunities are the same. Be intentional about remembering to bring those who are remote into calls and appointments. Have assistants look ahead on the calendar and include remote employees on the invite.

You also can use existing recordings to train new employees in a similar way. For example, to train Danielle on conducting client intakes, we pulled a few recordings of cold calls and sent them to her. We sent her a sampling of attorneys and issues to get started. Although she didn't observe live cold calls, we had her shadow another associate on intakes scheduled to take place via Zoom.

Communication & Collaboration

Miranda: Providing a new employee with observational opportunities leads to collaboration opportunities. For example, by observing depositions, new employees can help you nail down some great liability testimony, which could lead to collaborating on motions for summary judgment and requests to admit.

Using a cloud-based program such as Word in Office 365 makes it easy to provide feedback in comments and also track edits so new employees can see your thought process and learn the firm's writing style.

The supervising attorney must loop associates in. So often we try not to bother others with what we are doing, or we work in a very isolated way—even when we are sitting in the next office over from someone. When emailing clients, opposing counsel, or even my assistant, I try to include one or more of my associates (even by just forwarding them a copy) so they can be exposed to unique situations or approaches that don't happen every day.

For instance, I recently had an insurance adjuster draw a line in the sand during negotiations. Typically, I would call the adjuster and try to work it out. However, because of remote work, getting the adjuster on the phone became problematic. I reached out via email and outlined why her evaluation was incorrect using practical examples from previous trials. I bcc'd a couple of our newer associates on my email. The adjuster responded with a reconsidered position, and we resolved the case.

I forwarded this email to those same associates. Then we had a discussion about problem-solving, communication, and my approach. The simple act of including others often leads to in-depth discussion and allows for more learning opportunities and communication.

Danielle: Open communication is key, no matter the environment. New employees must feel comfortable asking questions or for feedback in real time so they can course-correct if needed. For example, initially I was hesitant to pull the trigger on declining cases myself— I kept notes and discussed them with a partner at one of our daily check-ins to see if I needed to do anything differently.

Getting feedback requires clear communication. As a new hire, put yourself out there and ask how you are doing, if you should be doing anything differently, how you could improve, or if anything more is needed of you. In my experience, these conversations were not only welcomed but also efficiently moved the team forward.

Miranda: To keep lines of communication open while remote, take advantage of technology beyond Zoom. In our office, texting each other to check in and ask quick questions is the norm, and we even have group texts for different projects we are working on together. When we have something we want to discuss in more detail, we typically set up a Zoom meeting. Recently, our phone system was updated to better handle our remote processes, and the system has a chat feature that has opened communication even more.

Research & Education

Danielle: Compile relevant reference materials (codes, rules, jury instructions) and links and login credentials to frequently used websites so new employees have what they need at their fingertips. Giving new employees access to tools and educational materials from the start lets them become credible members of the team—and it takes a lot of guesswork out of what is happening. For example, I read and reviewed all of the materials I was provided in any downtime. Because our system is cloud-based, I was able to search, review, and wrap my head around all of the firm's work product too.

This helps new employees understand the firm's writing style, learn about typical issues, and, most important, learn about the firm's normal audience as they begin drafting and researching. For example, I transitioned from a practice that did not handle personal injury matters, and my instinct was to use the word "accident." But by reviewing the samples our firm had available, I quickly learned that the connotation of "accident" was not what we wanted to present to our audience.

Also, the pandemic created more opportunities to attend a plethora of continuing legal education seminars virtually. New employees should look for things that would be helpful, but firms should also suggest seminars that would be useful for employees to flatten their learning curve.

Onboarding remotely or in person involves a lot of intention, attention, and communication.While most of us probably are not comfortable with others observing us in meetings or reading our emails—it is very vulnerable in many ways—you have to think beyond yourself and your computer. Regularly remind yourself how you can bring others in. Overall, if you embrace the resources available, maintain open communication, and stay organized, you can make the onboarding process exponentially more efficient and enjoyable.

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NOTE

1. To learn more about disaster-proofing your firm, see Karen H. Beyea-Schroeder & Candess Zona-Mendola, *10 Tips for Disaster-Proofing Your Firm*, Trial, Aug. 2020, at 42.