The Ultimate Law Firm Employee Onboarding Checklist

Written by Kate Rattray

Even if your firm is well established, it's inevitable that you'll have to bring new staff into the fold at some point. When this time comes, structured onboarding can go a long way—especially when guided by a law firm employee onboarding checklist.

When asked about the benefits of being in-office, leading law firms almost unanimously cited mentorship and new employee integration as a top workspace benefit. With recruitment being a top HR challenge for law firms, it's essential that your onboarding process be as smooth and complete as possible.

Curious what the best practices for law firm onboarding are? Our law firm employee onboarding checklist will help you streamline your onboarding, deliver a better experience for new hires, and ultimately improve your HR's hiring efforts.

Streamline your everyday tasks with Clio Manage, which makes it easy to collaborate on cases, organize crucial documents and information, and bring new hires up to speed.

Understanding the importance of law firm employee onboarding

Good help is hard to find, and when you finally find it, the temptation to throw them straight into work is strong. But a quality onboarding process is important for both your firm's and the new employees' well-being. Sadly, many law firms miss the mark with onboarding.

In fact, only 12% of employees are happy with their company's onboarding process.

Other than bucking the trend, why does law firm onboarding need a tailored approach?

General benefits of effective onboarding for law firms

Effective law firm employee onboarding comes with a number of benefits, many of which extend beyond providing a better experience for your new hires:

- **Faster time to productivity for new hires**: 51% of employees with great onboarding felt they were more proficient in their role, faster.
- **Reinforce your firm's reputation as a quality employer**: 78% of people with great onboarding had more positive feelings toward their company.
- **Helps set expectations for new employees from day one**: Proper onboarding helps establish clear role expectations from the beginning, setting employees up for a better, more realistic experience.

Beyond the above general benefits, effective onboarding for law firms has a ripple effect that impacts other facets of your firm.

Impact on employee retention and satisfaction

Great onboarding results in better feelings toward your firm, which means people are more likely to stay. This not only helps new employees, but also supports your senior employees as they won't have to deal with consistent turnover.

On top of this, those who are happy with the onboarding process have 2.6x higher workplace satisfaction.

Again, clear expectations help keep things grounded and realistic for both parties. This will set your employees up for success, and help ensure the role is the right fit early on.

Legal compliance and risk management during onboarding

Both legal compliance and risk management are critical to the success of any law firm. Fortunately, onboarding helps here too:

- Thorough onboarding ensures necessary employment documentation is completed on day one, and that nothing falls through the cracks.
- Confidentiality and compliance issues are costly. Onboarding mitigates these costly mistakes right out of the gate.
- There are numerous federal, state, and local employment laws to comply with. A thorough onboarding process will check these boxes and ensure compliance.

As an added perk, the above benefits will further establish your firm's reputation as one of quality and responsibility.

What are common onboarding mistakes in legal firms?

When onboarding new employees, legal firms often make the mistake of lacking a structured plan, leading to unclear expectations and delayed productivity. Common pitfalls include inadequate training on firm systems and compliance protocols, limited access to necessary tools and documents, and failing to integrate new hires into the firm culture. Without regular check-ins or mentorship, new employees may feel unsupported, resulting in low engagement and higher turnover.

Essential steps in the law firm employee onboarding process

What is included in a law firm onboarding checklist? While every firm is different, there are still several categories that each law firm should address with their employee onboarding checklist.

When going through each of the following sections, keep in mind your clients and what makes your firm unique, and adjust the items accordingly.

1. “Preboarding” activities to prepare new law firm employees

Preboarding takes place before onboarding and can help you deliver a smoother first day for new hires and your firm:

1. **Send welcome email with first-day details**: Include details on what to expect upon arrival and what their schedule looks like for the day.
2. **Provide access to your employee handbook, benefits info, tech setup instructions**: Along with these details, include relevant contact information for each area in case the person needs help.
3. **Prepare workstation, system logins, and software accounts**: Make sure your team has everything set up for the employee before arrival, this way they aren’t waiting around and can instead focus on meeting people and getting familiar.
4. **Assign a mentor or onboarding buddy**: Pair the new hire with someone more experienced. This person can help them with any questions, take them out for coffee or lunch, and make them more comfortable.

Preboarding activities take more of your time than they do the new hire’s, but it’s time well spent.

2. Key documents and forms to provide

Delivering necessary documents on day one ensures the aforementioned compliance and prevents the employee from wasting any time waiting:

1. **Employment contract and job description**: Include the job description with the contract to ensure there's alignment *before* the hire is official.
2. **Tax and payroll forms**: Include your state's relevant tax forms, along with your firm's payroll forms. Make sure they know who to contact if they have questions.
3. **Firm's policies**: Include firm-specific policies, such as your ethics, DEI, or cybersecurity policies. Be sure someone is available to answer questions.
4. **Confidentiality and non-compete agreements (if applicable)**: Your firm may have confidentiality and non-compete agreements, which you'll want to provide along with the employment contract.

Depending on your firm, you may have additional forms and documents to include on day one.

3. Scheduling orientation and training sessions

Once the employee is officially hired, you want to focus on getting them up to speed. The following orientation and training items will make sure you get employees started on the right track:

1. **Orientation**: Host a new hire orientation, covering firm structure, history, leadership, and values. Be sure to leave time for questions, making new hires feel welcome.
2. **Training and check-ins**: Prepare a 30-60-90 day training plan that helps the new hire work toward realistic goals. Also, include a check-in schedule between them and their manager and/or mentor.
3. **Role-specific training**: Beyond general training, make sure you include role-specific training, such as how to use case management systems and billing tools like Clio, legal research platforms, phone systems, and so on. As a bonus, schedule 1:1s with staff so the new hire can understand their roles in the firm.
4. **Compliance and security training**: Schedule initial compliance and security training, along with any regular, required training and compliance updates as needed.

Compiling the above items is a great time to think about your existing staff. Everyone can use a refresher, and this is a great opportunity to schedule any refresher training, updated security training, etc.

4. Cultural integration and team building

While skillset is important, it's essential new hires fit in well with the rest of the firm. Ideally you can get a feel for someone during interviews, but there are still steps you can take post-hire to help in this area:

1. **Reinforce expectations**: Set up training and meetings around professionalism, client service, and how your firm communicates internally and externally. It's a good idea to have refresher courses for the whole firm as well.
2. **Encourage relationship-building**: Your firm is a team, and it's important they work as such. Beyond an initial mentorship, set up coffee chats or team lunches, and fun team-building activities.
3. **Encourage cross-functional collaboration**: Encourage new hires to ask questions and collaborate with other departments. Depending on the size of your firm, you may have different legal specialties as well, which makes for a great knowledge-sharing opportunity.

While the above pointers are great for new hires, it's never a bad idea to revisit these items across the board. It's easy for people to get into a routine at a fast-paced firm, and team-building can fall to the wayside as a result.

Ongoing development and improvement

It can take new staff months—if not years—to feel comfortable in a new role, so don't assume work is done after the first week. You have to stay vigilant and make sure all your employees are working toward long-term, developmental goals:

- **Conduct regular check-ins**: Have all employees regularly check in with their manager, during which they can provide feedback to support both new and ongoing employee development. This also gives your team a chance to offer feedback to their manager, voice concerns, and so on.
- **Support employee growth**: Offer professional development and networking opportunities where it makes sense, providing personalized growth plans.

There's no blanket solution to development and improvement. Always keep the individual in mind and tailor your approach accordingly.

What are best practices for law firm onboarding?

Effective law firm onboarding—whether for clients or new hires—relies on clear communication, streamlined workflows, and a strong first impression. For staff and lawyers, it involves structured training, tech onboarding, and regular check-ins. Across all onboarding, ensure compliance protocols are followed and support is accessible to foster trust and long-term success.

Building a strong foundation for your firm

A thoughtful onboarding process is not only helping your employees thrive, but also building a strong foundation on which your firm can grow and last for the long haul.

Even if your firm is well established, you should audit your current onboarding practice using the checklist points above. Processes can and should change over time, policies can be updated, and nothing should ever be set in stone.

To truly deliver the best onboarding process, streamline your existing tasks and processes. Clio Manage can simplify everyday tasks in law firms, from automating paperwork to enabling online client payments to streamlining document management.

Book a Clio demo and see firsthand how you can simplify your operations and make life easier for your newest additions to your law firm and seasoned veterans alike.

Book a Clio demo

About Clio

Clio is the global leader in legal AI, powering legal work across the profession, from law firms of every size to corporate legal teams, government agencies, and courts. Its Intelligent Legal Work Platform unites the business and practice of law, connecting the people, information, and processes behind legal work. Clio's AI brings the context together with legal sources drawn from Clio Library, a growing collection of more than one billion legal documents. Over 400,000 legal professionals in more than 130 countries rely on Clio to run their legal world. Learn more at www.clio.com.