M&A, integration and lateral hiring

What I've built for law firms thinking about mergers, bolt-ons and lateral hires

General briefing · Alt-V Law

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In short. I've built a working kit for law firm M&A, integration and lateral hiring: two playbooks, 34 templates, an annex for laterals and small-firm bolt-ons, and four diagnostics that give a structured check on the riskiest decisions before anything is signed. A firm running hub acquisitions, bolt-ons and lateral hires at once is where a repeatable method pays back most. Four sample reports come with this note; every firm and figure in them is invented.

How this plays out across the market

Three shapes dominate what I see in law firm M&A. Consolidator groups run three combinations at once: regional hubs that keep their names (close to Preservation), bolt-ons that merge into the hubs (Absorption) and lateral hires on top. Mid-market mergers are usually Absorptions under a Merger of Equals label, and the partnership realises it eighteen months in. Lateral programmes carry their own economics: twenty to forty hires a year is a separate business inside the firm, and firms that treat laterals as individual decisions rather than a cohort find portability came in below plan after the first dozen signatures.

What sits behind it

Playbooks. A ten-stage pre-merger playbook; a twenty-workstream integration playbook from Day −90 to Day 365; a law firm supplement on votes, deeds, PEP, conflicts, PII run-off, AML and client account; guides on culture, defending clients and people during the deal, and unwinding a combination that doesn't take.

Templates. 34 of them, from the target scorecard and DD checklist to the master plan, RAID log, Day 1 comms pack, technology assessment and per-matter novation register.

Laterals annex. Three shapes treated separately: partner hire, team lift-out, small-firm bolt-on. It adds a practice-area discount on claimed books, a *Bolkiah*-standard pre-offer conflicts protocol, an SRA successor-practice and PII drill, and a Sponsor Partner delivery model with a 30/60/90/180-day dashboard.

Readiness map. A 90-minute session that tests whether a deal's structure matches what partners and staff are being told, and whether the firm can resource the integration it implies.

Where technology fits

Technology is very often where an integration's timetable slips. Most PMS overruns are data-quality overruns; client and matter numbering can't be reversed and tends to be decided late; conflicts need to be unified for new matters on Day 1; and the cyber baseline should rise to the stronger firm's standard. AI now speeds up conflicts re-runs, migration and data cleansing, but not retention or culture. The risk is integration timeline debt: technical work finishes early, the team is stood down, and the people workstreams lose their governance at months nine to twelve.

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The four diagnostics

DIAGNOSTIC	WHEN	WHAT THE SAMPLE SHOWS
Integration Readiness Assessment	Before heads of terms	48, Elevated. Technology is the riskiest axis at 65, driven by different PMSs and a conflicts check inside the target's PMS.
Lateral ROI and Break-Even	Before an offer	£1.5m private client team breaks even in quarter 12 on the central case and not on the downside; the guarantee needs reshaping.
Successor-Practice and PII Screener	Before a bolt-on is signed	Keeping the target's name triggers the SRA holding-out override; with conveyancing at 35% of fees, a step-change PII loading.
Lateral Retrospective	12 to 36 months after arrival	Cohort of three: Accelerate, Renegotiate, Manage out. Portability below plan for two of three points back at pre-offer diligence.

Where it tends to be useful

1. **A standard pre-signing screen for every bolt-on**, so each hub or deal team starts from the same evidence.
2. **A common integration kit across the hubs or practice groups**, so the technology, finance and conflicts work runs to one plan and lessons carry over.
3. **A firm-wide lateral review**, so portability and cross-referral patterns show at firm level.

Where is the next integration or lateral programme in your firm most likely to lose value, and would it be useful to run one of the tools against it before anything else moves?

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