WovenLegal

PRE-ONBOARDING CALL	WHO	CHECK
Delegation Worksheet Exercise	Client	
Create an Ideal Task List	Client	
Establish A Communication Plan	Client	
Create a Business Email for the new VLP	Client or firm employee	
Grant access to the firm calendar	Client or firm employee	
Grant access to programs needed to train in and utilize (CRM, Task Mgmt Tool, etc.). Where are templates stored? Is there a shared drive? Is the para dependent on client or firm staff to upload responses, etc, needed for work to move forward?	Client or firm employee	
Name a backup person as an additional resource	Client	
Identify what % of billable time and how/where to report time. Is there an admin matter?	Client	
Send any Law Firm information for VLP review (Org chart, Company mission, Goals, etc.)	Client or firm employee	
Send communication preferences to VLP (email, phone, text, app, etc.)	RM/VLP & Client	
Send the client's ideal work week to VLP (including a preference for when and how to ask questions (consider a backup as well)	Client	

IMMEDIATELY FOLLOWING THE ONBOARDING CALL	WHO	CHECK
Ask VLP to draft a brief bio of themselves & their work history to share with your team	VLP	
Send an email to introduce VLP to the team using the bio they created	Client	
Confirm with all responsible parties that the VLP setup is complete (email, systems access, etc...)	VLP/ Client	
Schedule training/ meeting times for VLP with relevant team members for the next two weeks	VLP/ Client	