

# Don't Forget Alumni Engagement When Merging Law Firms

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The complexities of law firm mergers are vast. Efforts to integrate clients, systems, spaces and cultures under tight time restraints is an immense undertaking that affects populations across both firms — including the alumni networks.

An April 3 report by Fairfax Associates shows law firm mergers are up in 2023 compared to 2022, with 16 completed mergers in the first quarter and several combinations already announced for the second quarter. The same report notes that this trend of increased merger activity is expected to continue throughout 2023, as firms are interested not only in geographic growth but also in building core practices and sector strengths.[1]

As more firms consider mergers, it's important for law firm management to be mindful of alumni engagement efforts. Alumni have deep connections to their legacy firms and colleagues. If not managed carefully after a merger, it can be easy for them to disconnect from a “new firm” they feel they weren't part of or no longer know.

That's where alumni relations professionals should step in: to keep care and concern for the alumni experience in focus during each phase of the merger.

Alumni relations teams should ensure that alumni from both organizations are aware of the combined firm's values, informed about firm news and initiatives, and confident that they remain valuable members of the firm's expanded alumni network.

Combining thorough data management practices with consistent outreach and engagement efforts is essential to keeping an alumni community strong during and after a merger.

## Data Management

Maintaining reliable contact information sets the foundation for any successful alumni program, and preserving legacy data is an important element in establishing the new firm's history.

The first priority for an alumni relations team should be the transfer of alumni data to a shared client relationship management, or CRM, software system.

This will likely not be a quick or easy endeavor, but the effort will pay off in the longer term. In addition to system limitations, duplicative information and formatting issues often present, which need to be corrected manually. Collaboration with the firm's CRM team will become invaluable.

Data management is a dense process, but taking time to enter consistently formatted and up-to-date information early in the transition will smooth the path for future outreach and engagement efforts.

## **Outreach**

It's easy to understand why alumni feel connected to their legacy firms — these represent the places they worked, the colleagues they know and the experiences they shared. The old firm feels like home and that's tough to recreate for people working outside the firm's walls during a merger.

Frequently communicating with the alumni throughout the merger will increase the chances that they gain a similar sense of belonging at the new firm.

It's important for the alumni to become familiar with the firm's new name and logo and start to recognize that it is still "their firm." Branded emails, newsletters, announcements and social media posts are a natural way to introduce the new firm, its lawyers and professionals, and its fellow alumni. And what a great time to distribute that new firm swag!

Alumni outreach efforts also should promote the distinct advantages of an expanded alumni network. Access to a larger pool of industry experts, talented professionals and trusted advisers can lead to meaningful connections between alumni and firm attorneys and help both achieve their business, professional and personal development goals.

## **Engagement**

Keeping alumni engaged or getting them to reengage post-merger can be an arduous task at first. It's important to remember that engagement can come in many forms and gains momentum with time.

Offering continuing legal education programming to alumni is a popular option for engagement. Who doesn't need CLE hours? Programs on ethics and professionalism, which are hard to come by, yield high attendance and are appreciated.

In-person events are quite popular in a post-merger environment. Gathering in person fosters a sense of belonging, and guests enjoy connecting and reconnecting with firm attorneys and fellow alumni. Intentional follow-up with those who attended, and even those who did not, creates another communication touchpoint. Taking

pictures of the events and sharing them on social media is a great way to start creating memories within this new network.

If there isn't an existing one, consider starting a LinkedIn page dedicated to alumni. Once the page is created, promote it early and often. Engage the alumni with original content, invitations and timely news about the firm and attorneys. This is a great platform for the community to celebrate wins together.

Use alumni newsletters to highlight alumni from each legacy firm, promote alumni-inclusive events and CLE programs, and deliver messages from leadership directly to alumni. A section featuring alumni job changes provides a great opportunity for former and current firm attorneys to reach out and create community engagement organically.

Create opportunities for alumni to give back by asking them to sit on expert panels for events and CLE programs. Having a chance to present themselves as an expert in their field and pass along knowledge gained in their new role is beneficial to the alum and the firm.

Finally, consider including alumni in any regional service projects or pro bono efforts. Many attorneys find it difficult to find these opportunities once they leave a firm setting. This allows them to give back to their community while engaging with the firm and each other.

## **Conclusion**

No matter how much preparation goes into a law firm merger, the early stages of the process are complex and chaotic for all firm communities — including the alumni network.

Alumni may be reluctant to invest their time and efforts because the new firm doesn't feel like the home they knew. It's vital for alumni relations professionals to seize the opportunity to reenergize the alumni program early in the merger process.

Any combined alumni program needs to be built on a solid foundation of accurate data and preserved history from each of the legacy firms.

Informative outreach needs to start as soon as possible. Sharing branded messages, publications, and promotional items will strengthen ties between the alumni network and the merged firm.

Plans should include intentional opportunities to involve alumni in CLE programming, expert panels, in-person social events, pro bono service and community initiatives.

Focus on enhancing alumni experience should remain an ongoing effort. There are so many innovative and engaging ways to build connections among new colleagues and rekindle existing relationships.

Not only is keeping alumni invested in a merged firm the right thing to do — it's the best thing to do, and it's mutually rewarding.

*Clare Roath is the director of alumni relations and Erin Warner is the manager of alumni relations at Troutman Pepper.*

[1] <https://fairfaxassociates.com/press-releases/law-firm-mergers-up-in-first-quarter-of-2023/>.