



Lowenstein Sandler's Women's Initiative Network Podcast: Real Talk

Episode 43: Women Making (Lateral) Moves

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Rachel Dikovics: Welcome to the Lowenstein Sandler podcast series, the *Women's Initiative Network: Real Talk*. I'm Rachel Dikovics, counsel in Lowenstein's white collar defense practice group, and a member of the Women's Initiative Network at Lowenstein Sandler. Before we begin, please take a moment to subscribe to our podcast series at Lowenstein.com/podcast or find us on iTunes, Spotify, Pandora, or SoundCloud. Now let's take a listen.

Megan Monson: Welcome to the *Women's Initiative Network: Real Talk*. I'm your host, Megan Monson, partner in Lowenstein Sandler's Executive Compensation Employment and Benefits Practice Group. Today, we're tackling a topic that many of you have asked about: making a lateral move in your legal career. It's a big decision, and one that could feel especially complex for women. We're here to try to demystify the process, share lessons learned, and offer tactical advice.

Joining me today are two amazing guests, Kerry Lunz, our Director of Recruiting, who has a deep understanding of what firms are really looking for and how candidates can stand out, and Julia Sanabria, one of our more recent lateral partners, who's here to give us a candid, personal look at what the experience was like from the other side. Thank you both so much for being here.

Kerry Lunz: Thanks for having me.

Julia Sanabria: Thanks for having me, Megan.

Megan Monson: Let's start with the basics. For those unfamiliar, Kerry, can you describe the lateral recruitment process? What are the key steps, and what should candidates expect along the way?

Kerry Lunz: Sure, happy to. Generally, procedures are going to vary from firm to firm, but the basics are going to be the same. The first thing is you become aware of an opportunity, and whether that is through a recruiter or through

doing your own research. If you are working with a recruiter, just make sure that you're really engaging with them. You're not just turning your career over to somebody that you've just met.

You're getting to learn them. They get a chance to learn about you and understand what you are looking for in your career. One key thing when you're working with a recruiter is make sure that you let them know that they need your permission to go ahead and submit your resume to firms. You don't want your resume being submitted places that you don't know. If you're working on your own and looking at opportunities, I know this is maybe a little bit old-fashioned, but when you're submitting your information to a firm, generally it's going to be through a portal that they have set up, besides your resume, you do want to probably do a cover letter that is going to be tailored to the opportunity and to the firm to help distinguish yourself. Once you get the opportunity to interview, usually you're going to have an initial screen. A lot of times anymore, those screens are via Zoom. Then if you continued in the process, be patient with the interviews. Firms try to get through it as quickly as possible, but you are dealing with busy people who are going to be potentially moving schedules around, but generally, those are going to be either maybe two-on-one interviews, or you're going to have multiple individual interviews during the course of a day.

As you get further in the process, those interviews are going to change from Zoom to in-person interviews. As you're going through the interview process, what you want to make sure to do is, and this, again, sounds pretty basic, but do your research on the firm, understand who you're interviewing with, why you're interviewing with those particular people. That's when you're working with a recruiter that comes really handy. Again, leverage your recruiter as you're working with folks.

And be prepared with questions. It's always, you go through interviews, you've spoken with multiple people, you don't necessarily want to have a set list of questions, because a lot of times, those will be addressed during the interview process. As you're talking to individual folks, pull a question out from that individual meeting, because you want to make it personal as you've gone through the process. It also shows your interest with the firm.

Then if you get through the offer process, if you're interviewing with larger firms, a lot of times, we'll get your offer and it's going to be, a lot of firms are still very much lockstep, so understand that, but don't be afraid to negotiate either, but understand what the market holds when you're doing that. Then I do want to distinguish, the biggest difference probably in the

process between interviewing as an associate and counsel versus interviewing as a partner, the diligence process is a lot different.

Usually as counsel and associate, your diligence is going to be handled after an offer is extended to you. As a partner candidate, and Julia is going to be able to speak to this, but you are going to be doing the diligence process throughout the interview process. That will involve completing a lateral partner questionnaire, which is going to involve answering questions, professional liability questions are part of that, your education background, but a lot of it's going to be related to your clients and what you think is going to be the portability potentially of those clients.

Understanding the kind of hours you've built over the course over the last several years, how much time you spend on business development, how much time you spend on actual working hours, things of that nature, and then you'll also sit down and talk to folks about your client base, and really trying to understand if your client base and your practice makes sense. The firm might think so, but you also, as an individual, of course, want to make sure you're landing at the right place to make sure that you can develop those clients further. That's the not relatively quick synopsis of the process.

Megan Monson: No, that's extremely helpful. I appreciate you walking us through that and also demystifying the process, because it can be very daunting for people who are just starting that out. Julia, let's talk about your journey. What made you decide to make a lateral move, and what did the process look like from your perspective as a partner? Was there anything that caught you off guard or that you wish you'd known about before starting the process?

Julia Sanabria: First, as to why I was looking to make a move, I just was getting to a point in my career where I wanted to take a little bit more ownership of my practice, manage a team the way that I wanted to manage a team, and just kind of step into a more senior role within my practice. With respect to why I decided to make a move, I was just looking to take a little bit more ownership over my own practice, step into a more senior role, manage a team in a way that I thought was the best way to manage a team.

I started looking around and was focusing really on places I had a personal interaction with someone. The first bunch of firms I met with were more real estate-based and were people I had been across the table from. I was thinking, what are their practices look like? Is that what I'm looking for in my practice? I wish I had known, I guess Kerry kind of hit

on it, all of the information that you need. I actually had moved as a partner before, so I did kind of understand that I would need to have all of my billable hours, my clients, things like that.

But I wish I had known to be a little bit more organized leading up to when I was leaving, because then it would've been all the firms pretty much asked the same questions for the most part. It gets a little bit harder to start asking your current firm those questions when you know you're doing anticipation of a move.

I think there's ways that it's probably good just generally to have, because it gives you a better sense of your business, and even if you're not looking to make a lateral move, just how things are going, but it could put you in a position to be a lot more organized and be able to make all the assessments that Kerry was talking about in terms of portability and things like that.

Megan Monson: No, that makes a lot of sense. I actually really like what you just said, because there also can be a lot of value in having that information for both yourself on an ongoing basis to compare yourself to year over year, as it comes to getting whatever your comp is. Those, I think, are just helpful data points that especially at a partner level, you should be kind of focused on and following.

Kerry, from your vantage point, do you notice any differences in how male and female candidates approach the lateral process? Are there any patterns that you've seen in terms of confidence level and negotiation styles or just questions that they raise?

Kerry Lunz: I'm going to focus on this from a lateral partner perspective. What I have found over the last several years is that the female candidates we've worked with have tended to underestimate their portable business, and then they tend to over-deliver when they join the new firm. They have the clients, but they are very circumspect about whether they think those clients are going to make a move.

What we've been able to do, and I think that what helps things along is we sit down, and we go through the client list with them and understand how they develop those relationships. As we've done that, I think it helps them understand that "I actually really do have this client," because I think a lot of times, the concern is of course, "Well, this client's just going to stay at the current firm," even though they've been the one to really develop that client.

To go through that process and help people understand that they are the ones who have put the work in, they had built a relationship, they're doing the majority of the work, or even if they're sending it to their associates or even other partners, they are the ones that own that client. That has definitely been the biggest difference. Otherwise, I think it's pretty standard across the board in terms of approach.

People have individual personal things that they'll ask of course, what's important to them. I do think in that regard, actually, women are more vocal about that than male candidates tend to be when it comes to things outside of the traditional work stuff. Those are the two differences I've noticed.

Julia Sanabria: Kerry pretty much just described me and my experience. I think she really hit the nail on the head. From talking to female partner friends of mine who have made moves and have gone through the LPQ process at different firms, it does seem to be gendered along these lines. I agree with Kerry, it's not that the men are promising something that they don't have. I think there tends to be a pattern, if a woman is really kind of pressed on, will they come or will they not?

I remember sitting in a room going through this, actually, with Gary, and he was very thoughtful about it, asked me a lot of questions. For each client, we kind of pegged it to a percentage, how comfortable do you feel that they're going to join? How likely is it that they'll move with you? Suddenly, I was very confident but also thinking, "Well, geez, what if I'm wrong? What if I tell him this and they peg my comp to this number, and suddenly I can't deliver it all?"

I do think that's something that does tend to be gendered. The fear of over-promising and under-delivering, I think, often puts us in a situation where we're doing the exact opposite. One of the things that I love about Lowenstein is they saw right through that and said to me, "We actually think that more are going to come than you think." They gave me the confidence to kind of up my numbers a little bit. It would be great to see that change, because I think it happens more often than you think.

Megan Monson: Well, and I think that's a helpful point that both of you raise. I think maybe part of that is educating female attorneys, not even just at the partner level, but as a more junior level of, "These are the things to think about. This is how we build client relationships. These are the metrics that we've seen really help those clients stay sticky," and also helping build that confidence, so if they are then in that situation down the road, and are interviewing for a lateral partner position, they may be more likely than to

say, "Hey, these are actually my clients," and have more of the confidence to do that.

Shifting gears a bit in terms of integration, let's talk about how a thoughtful integration process looks, and how firms can help laterals feel to be part of the team quickly. Julia, what made the biggest difference for you in adjusting to a new firm?

Julia Sanabria:

I would say it was definitely Kerry's team. From the day I started, they gave me one point of contact who would answer any question I had, and if they weren't the right person for it, they would find the right person. I never found myself sitting at my desk, thinking, "Gosh, I really need to get in touch with document services," or "I need somebody to help me with the pitch that I need to immediately."

I could just call the one person who was designated to me, and they would help me find that person. That is, I think, half the battle in the beginning is just knowing who to talk to. That was really helpful. Then the other thing that I thought was really great that I think all firms should do is they actually set me up with different partners within the firm who could be helpful to my practice and gave me the opportunity to weigh in on who that might be.

I remember sitting down with people from Kerry's team, saying, "Which teams can support you?" Then they would find the right partner within that group for me to meet. By the time I had been here for six months, I knew a lot of people, I knew who to find when my clients needed help, and I had a better understanding of how to cross-sell within the firm.

Megan Monson:

That's fantastic. I think that if that's not something all firms do, I think that's a great way to get people integrated and starting to make those connections from day one. Kerry, from a recruiting and leadership standpoint, what are the best practices you've seen in welcoming lateral hires, especially women?

Kerry Lunz:

I think we're ahead of the curve on this. We started a dedicated onboarding orientation and integration department. It's been close to three years at this point. As Julia mentioned, we do have a point person who is the go-to that can answer pretty much any and all questions that a lateral has coming in. The biggest piece is starting the process before a partner arrives, or an associate or counselor arrives.

That means getting everybody on the staff side, we pull in multiple staff departments into the process, and we have calls with people before they

start, so we can answer questions for them when it comes to things like IT, to their marketing and business development efforts, to things like document services, how client transfers work, any and all questions that somebody might have as they're coming over. It's a lot going on for somebody who is making a move so our thought is let's take as much of the burden off of somebody as we can, and help them with all of these steps. A big part of it is picking the right mentor for somebody or the right liaison as they're coming in. That can be an official assignment, or even if it's just unofficial that you put somebody, have them go to lunch with someone that you know that they're going to hit it off with, who can help them walk through some of the firm stuff. They've been here for a while.

We also work on developing long-term integration plans for people, and we track. It involves both integration culturally into the firm, as well as business development integration. If it's a partner who's arriving and they have clients, we are certainly focused on that for them as well, but we don't want to lose sight of the fact that you are at a new firm, and you're going to be working with new partners, so getting a chance for you to meet those partners.

On the associate side, it's making sure you're getting in front of people who are going to be able to give you work, and making sure we're scheduling those meetings, we're tracking those meetings. If you're not able to make a meeting, we'll make sure you get that meeting done down the road. We really do stay on top of that for folks. For women who have joined, we always are cognizant of trying of making sure that we are connecting them, I don't want to say successful, but with people who have been here, who have done well at the firm to help provide guidance.

Again, that doesn't have to be an official mentor, but it really is for somebody who can help point somebody in the right direction about, "Oh, who can help me with this", or "What do I do in this kind of situation?" Then also letting them know what other resources are here, like WIN for example. They don't have to take part in it, certainly, but understanding that there are a lot of resources that are dedicated to someone's success as they join.

Megan Monson:

I really love what you said about all of the pre-joining things that you do and that your team does, because I think sometimes, just from fellow attorneys and friends that I've spoken with, that could be a very daunting thing is what's the new IT, what are the onboarding processes going to look like? Just understanding that aspect of it makes it a lot easier than when you get here, being able to actually focus on meeting people, doing

the client work, because you've taken a lot of the more administrative stuff about taking on a new job out of the equation.

This has been such a powerful conversation. Before we wrap, any final words of advice for the women listening who are contemplating their next move? Do you have any inspiring words to somebody who's unsure whether they're ready or deserving of taking that leap?

Julia Sanabria:

I guess I would say in going through this process, it can be very intimidating. You're meeting person after person, you feel like you're selling yourself, you're trying to convince people that you're going to be successful. I think it's important to kind of take stock of how you got to where you are and why these places want to meet with you in the first place and understand that you're interviewing them as much as they're interviewing you.

You should ask to meet as many people as you can. You should remember that part of the firm's job is to do their diligence, and you shouldn't be stacking the odds against yourself before you even start. I think it's really important to just appreciate everything that you've done up to that point, and constantly remind yourself, I would hate to see someone miss out an opportunity because they think they're not deserving. I think it's the firm's job to determine who's deserving.

I would say my number one piece of advice would be not just to assume that the firm doesn't think you're going to be successful and that you're going in, kind of, they're meeting with you in the first place because they think you're someone who could really add to their team. If you go in with the assumption that you're trying to prove them wrong, what you're really trying to do is prove them right.

Megan Monson:

Yeah, I love that. I know one thing that we talk about often in WIN is a lot of female professionals face imposter syndrome, and I think that kind of goes to exactly what you said, that we shouldn't be our own harshest critic. We've all gotten to be the professionals that we are today, so have the confidence as you're going into that room.

Kerry Lunz:

Absolutely, do not undersell yourself. One thing I would add is understand why you want to make a move because that really will obviously direct where you might likely end up. Not that you're just running towards something, but really understand what your career goals are, and the type of firm you're looking at. Every firm has a unique culture, take that into account as well.

Megan Monson: Well, Kerry and Julia, thank you so much for joining us today. I'm sure our listeners have found your insight and perspective very useful. This has been another inspirational and thought-provoking discussion. Thanks for joining us for another episode of the *Women's Initiative Real Talk*. We'll see you next time.

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