


The First 90 Days:

# Law Firm CMO Transition Playbook

A practical leadership guide for building credibility,  
influence, and measurable growth in your first 90 days



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The First 90 Days: Law Firm CMO Transition Playbook

# Executive Summary

## Stepping into a CMO role in a partnership environment

Whether you're joining a law firm from another organization, being promoted internally, or stepping into the firm's first-ever CMO position, the first 90 days will shape far more than your onboarding experience. It will influence how partners perceive marketing, how leadership engages with growth, and how confidently your team operates under your direction.

Law firms are distinctive leadership environments where authority is rarely defined by hierarchy alone. Influence is earned through trust, commercial understanding, and genuine contribution to partner success. Decisions often form through conversation and consensus long before they appear in formal governance structures, and relationships sit at the center of everything: revenue, reputation, and long-term stability.



# For a new CMO, this presents both an opportunity and pressure.

You're expected to understand the business quickly, build credibility with senior partners and leadership, lead and stabilize a multi-discipline team, demonstrate early commercial value, and begin shaping a clearer path to growth. All while operating inside a culture that may be cautious about change and protective of long-standing ways of working.

Being a CMO, you are the expert. You got here by understanding how to navigate organizations, build stakeholder relationships, and grow businesses. But sometimes in a new role, there's a lot to learn and take on all at once. So, this playbook isn't designed to be exhaustive or prescriptive, nor does it get into the nuances of firms in different practice areas or regions. Rather, it's designed to provide you with high level guidance. Maybe some sections will serve as reminders, maybe some will be spur on new ideas. Either way, this playbook will be a companion in your first 90 days to help you navigate your new role with clarity and confidence.

You may arrive with deep legal sector experience, or from another professional services or corporate environment. The core challenge remains the same: turning your first 90 days into a foundation for long-term influence and measurable growth.

This playbook breaks the transition into three practical phases:

## Days 1-30

Understanding the firm, building trust, and settling in with purpose

## Days 31-60

Demonstrating value, creating momentum, and aligning around growth

## Days 61-90

Establishing strategic direction for marketing and growth



Chapter One

# Days 1-30

## Understanding the firm and building your foundation

The first month in a CMO role can feel deceptively calm, as calendars fill with introductions and information begins to flow. It's easy to experience this period as an orientation rather than leadership. In reality, the first 30 days are among the most important of your entire tenure.

This is when you quietly build the understanding that will shape every strategic decision you make later. It's also when the partnership begins informally developing an early view of you through your tone, curiosity, and the questions you ask.

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Your role in this phase is to build a deep and efficient understanding of the firm.

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# Understanding how the firm truly works

Strategy documents and organizational charts rarely tell the full story of a law firm. Real influence often sits with trusted partners rather than formal titles. Client relationships may be concentrated in ways that are not immediately visible, and historical decisions may still shape present behavior.

During your first month, your goal is to build a practical picture of where revenue really comes from, which clients and sectors matter most, how partners collaborate or don't, how decisions move through leadership, and what growth has looked like in recent years.

Listen carefully to what is emphasized, avoided, or repeated. You'll find many patterns will emerge quickly based on what is expressed (and left unsaid).

## What to look for:

- Start by reviewing the firm's financial performance over the past 12-24 months. Which practice areas are growing? Which are declining? Who are the top 20% of clients who drive 80% of revenue? "These clients" will become critical to your understanding of what marketing needs to support.
- Look at how new work originates. Does it come from existing client expansion, referrals, direct inquiries through the website, or partner networking? Understanding these patterns will help you identify where marketing can have the most immediate impact.
- Pay attention to the partnership dynamics. Some firms operate with clear decision-making structures. Others work through informal influence networks where the real power sits with a handful of trusted advisors rather than official committee roles

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# Meeting the people who shape success

In a legal partnership, relationships define effectiveness. You should consider introductions and early conversations as opportunities to begin building trust. Focus your time intentionally across four groups:

- **Senior leadership:** understand ambition, pressure points, and expectations of marketing.
- **Influential partners:** learn how work is won, protected, and expanded in practice.
- **Your marketing and business development team:** assess capability, morale, clarity, and untapped potential.
- **Key operational leaders** across the firm, including finance, HR, and technology: build cross-functional relationships so you can get buy-in for future initiatives.

You should approach these conversations with curiosity rather than solutions. Any advice offered too early can unintentionally signal that you're still interpreting the firm through your previous environment.

## How to structure your conversations:

- **With the managing partner and senior leadership,** focus on understanding their strategic ambitions for the firm and where they want to be in three to five years. Are there new practice areas, geographies, or service lines they're considering? What's preventing faster growth, and what role do they expect marketing to play in removing those barriers? These conversations reveal the firmwide priorities that should shape your entire marketing strategy.
- **With partners,** the focus shifts to their immediate business development challenges and sector-specific opportunities. What work are they currently chasing? Which clients could they expand if they had better support? What's getting in the way of winning the matters they want most? These conversations will reveal whether marketing is currently seen as a strategic partner or an administrative function, and more importantly, where the real opportunities to add value sit at the practice level.

- **With the marketing and BD team,** focus on understanding what they've been working on, what's worked well, what hasn't, and where they feel stuck. Don't make promises or announce changes yet, just listen. You'll learn as much from their energy and confidence as you will from their specific answers. Plus, listening now will build the foundation for the changes you'll introduce later.
- **With finance and technology leaders,** understand the systems and data that currently exist and what gaps are preventing better decision-making. What's tracked consistently? What gets reported to leadership? What's missing entirely? This context will become critical when you need to demonstrate ROI and build the business case for investment in marketing infrastructure.

## Understanding the current growth engine

Even in firms without a formal growth strategy, patterns still emerge around how work comes in. Every new matter originates somewhere, whether through existing client expansion, referrals, direct inquiries, or partner networking. Marketing and BD activities influence these outcomes in ways that may not be immediately obvious but become clear once you start looking for them. Use your first month to explore how opportunities are tracked, if at all. Look out for how cross-practice collaboration occurs, is it consistently or informally? What technology supports client intelligence and reporting? How do events, campaigns, and profile activity connect to revenue? Where does leadership lack visibility or confidence in data?

### Audit what already exists:

- **Review the firm's website** with fresh eyes. Which practice area pages rank well? Which convert visitors into inquiries? Which pages are outdated or lack clear calls to action?
- **Look at the CRM system,** whether it's InterAction, Salesforce, Nexl, HubSpot, or something else. Is it being used consistently? Do partners actually input relationship data? Can you run reports that show pipeline health and opportunity tracking?

- **Examine recent marketing campaigns**, events, webinars, and thought leadership pieces. What was the strategy behind them? Were results measured? Did they generate meaningful engagement or just activity?
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These insights will later shape your priorities around CRM adoption, reporting infrastructure, and growth strategy. For now, your role is simply to see clearly.

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## What success looks like by Day 30

A strong first month rarely produces visible change. Instead, it produces clarity, trust, and informed perspective.

By the end of Day 30, you should feel confident that you understand the firm's real commercial drivers, know which relationships matter most internally, have built early credibility with leadership and partners, see the strengths and gaps within your team, and recognize where growth is constrained by visibility or structure.

If these foundations are in place, you're ready to move from observation to momentum.

# Days 1-30 Checklist

## Understanding the business

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- Review recent financial and sector performance over the past 12-24 months, including a win/loss analysis of clients
- Identify top 20% of clients by revenue and strategic importance
- Map where new work has originated and which practice areas are growing
- Audit the firm's website, focusing on high-performing pages and conversion points
- Review current CRM data quality and usage patterns

## Building relationships

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- Hold structured one-to-one conversations with managing partner/s and executive committee
- Meet with influential practice group leaders and rainmakers
- Meet every member of your marketing and BD team individually
- Establish open dialogue with finance, HR, and technology leaders
- Shadow a few client meetings or pitches (if possible) to see the firm in action

## Assessing growth capability

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- Review current marketing and BD plans (if they exist)
- Understand how opportunities and relationships are currently tracked
- Evaluate the effectiveness of recent events, campaigns, and client programs
- Assess the quality of partner profiles, case studies, and thought leadership content
- Review pitch deck quality and proposal response processes

## Creating early confidence

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- Communicate thoughtful observations
- Demonstrate curiosity, calmness, and commercial focus
- Begin forming a clear view of where growth opportunity sits
- Avoid the temptation to announce sweeping changes or promise quick transformation
- Show partners you understand how legal work is won

Chapter Two

# Days 31-60

## Creating momentum partners can see

By the time you reach your second month, you may notice a subtle shift as the welcome period fades, and the initial curiosity from partners and leadership turns into expectation. Conversations become less about introductions and more about impact, and even if no one says it directly, the question forming across the firm is simple: what difference will this CMO make?

This is not a moment for sweeping transformation. Big strategic changes introduced too early can create resistance before trust is fully formed.

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Instead, the purpose of Days 31-60 is to generate measurable, partner-relevant momentum by demonstrating practical progress, early commercial outcomes, and signals that marketing understands how the firm actually wins work.

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# Identifying the right early wins

Not all progress carries equal weight inside a partnership. Highly visible marketing activity may create internal noise but little confidence. In contrast, a small commercial win connected to partners' real priorities can shift perception quickly.

Effective early wins may look like strengthening a live pitch or proposal that converts into new work, reconnecting with an under-engaged but strategically important client, sharpening the firm's positioning in a priority sector or market, improving follow-up and intelligence from a recent client event, or clarifying where marketing investment is not producing value.

Partners notice when marketing helps them succeed, so your focus should be on outcomes that directly improve revenue and relationships.

## Where to look for quick wins:

- Start with opportunities already in motion. Is there a major pitch happening in the next few weeks? Offer to refine the proposal, improve the presentation deck, or conduct competitive intelligence that gives the team an edge.
- Look for low-hanging fruit in the firm's online presence. Are key partner bios outdated or lacking client-focused messaging? Update them with SEO in mind and watch how quickly partners notice when they start getting more inquiries.
- Identify broken processes that frustrate partners. Maybe the pitch deck creation process is slow and cumbersome, or event attendee lists aren't being properly captured and nurtured. Fix one of these, and partners will remember.
- Consider content that can be quickly repurposed. Did the firm recently host a webinar that got good attendance but had no follow-up content? Turn it into a blog post, a set of LinkedIn articles, or a video series to show partners how marketing can extend the value of an initial time investment.

# Leading your team through the transition

While momentum is building externally, an equally important shift must occur internally. Your marketing and business development team is adjusting to new leadership, new expectations, and often a new level of visibility across the firm. During this period, your role is to provide clarity, stability, and direction without overwhelming the team with change. Focus on three leadership pillars:

## Establish clear priorities.

Ensure your team understands what matters most now. In law firms, this often means focusing on the activities that directly support partner business development efforts rather than broad brand awareness campaigns.

## Give encouragement and recognition

Early encouragement builds trust and performance. Start to build rapport with your team and if someone has been doing excellent work that hasn't been recognized, make sure the partners know about it.

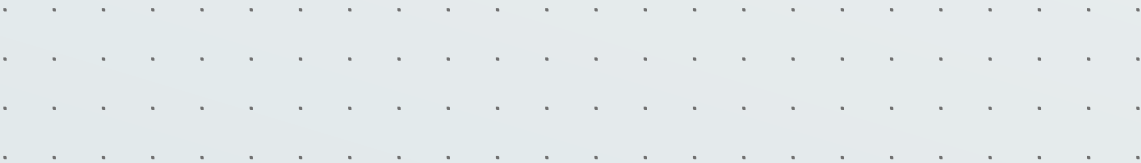
## Introduce practical accountability

Many law firm marketing teams have operated without clear KPIs or performance metrics. Start simple with things like response times, quality standards, and completion rates before introducing more complex methods of evaluation.

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When your team feels supported, they'll be prepared to champion broader transformation in the months ahead.

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## Practical ways to build team confidence

The fastest way to earn your team's trust is to show them you'll protect their time from low-value work, make sure their wins get noticed, and give them the clarity they need to operate effectively. Try these three steps to build a positive team culture:

- **Stop projects that aren't working.** If there's a monthly newsletter that no one reads or an event series that consistently underperforms, pause it. Your team will appreciate the direction, and you'll free up capacity for higher-impact work.
- **Celebrate small wins publicly.** When a pitch is won with strong marketing support, make sure the team gets credit in front of partners. When a piece of thought leadership generates meaningful client engagement, share it widely.
- **Provide clarity on decision-making.** One of the biggest sources of frustration in law firm marketing teams is unclear authority. Be explicit about what decisions the team can make independently and what needs partner input or approval.

## Beginning the growth conversation with leadership

As early wins emerge, you gain permission to shift the tone of dialogue with senior leadership and partners. Conversations can now move beyond understanding the business toward shaping its future.

This is the stage to begin exploring questions like, where should the firm be growing faster than it is today? Which clients or sectors represent the greatest untapped opportunity? What prevents stronger cross-practice collaboration? How clearly can we see future revenue today? These discussions should feel grounded in evidence from your first 30 days.

### Frame the growth conversation around data:

- **Present what you've learned about client concentration.** If 80% of revenue comes from 20% of clients, what does that mean for client retention strategy? What's the plan if one of those top clients reduces their work?

- **Share insights from your win/loss analysis.** Why is the firm winning in certain sectors or matter types? Why is it losing in others? What does this suggest about where to focus resources?
- **Highlight pipeline visibility gaps.** If the firm can't clearly see what opportunities are likely to close in the next quarter, that's a strategic risk. Use this to build the case for better CRM adoption and opportunity tracking.
- **Identify cross-selling potential.** Are there clients who work with only one practice area when they could benefit from others? This is often the fastest path to revenue growth, and it positions marketing as a connector rather than just a promotional function.

## What success looks like by Day 60

By the end of the second month, strong transitions usually share a common pattern. Marketing is still earning trust, but it's now associated with forward movement rather than observation.

You should begin to see partners involving you earlier in opportunities or client discussions, leadership seeking your perspective on growth, clearer internal priorities across the marketing and BD team, early commercial outcomes linked to marketing support, and growing awareness that visibility of relationships and pipeline could be stronger.

# Days 31-60 Checklist

## Delivering early commercial value

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- Identify two to three opportunities where marketing can influence near-term revenue
- Support at least one live pitch, client connection, or sector initiative with tangible improvements
- Capture and share evidence of progress with leadership in their language
- Fix one broken process that frustrates partners or slows down business development
- Update high-value partner profiles and practice area pages with client-focused content

## Strengthening the team

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- Clarify immediate priorities across marketing and BD with specific deliverables
- Recognize individual contributions and stabilize morale through one-on-ones
- Introduce simple structures that improve focus without creating friction
- Stop at least one activity that's consuming resources without producing results
- Create visibility for team wins with partners and leadership

## Shifting leadership dialogue

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- Begin structured conversations about growth priorities and constraints
- Share insights grounded in data, relationships, and observation from your first 60 days
- Highlight where visibility of pipeline or clients is limited and the business risk this creates
- Present early evidence of marketing's commercial contribution
- Build the case for infrastructure improvements like CRM adoption or reporting systems

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Chapter Three

# Days 61-90

## Setting direction and stepping fully into the CMO role

The final month of the first 90 days feels different from the first two. You're no longer new. The firm has seen how you think, engage, and operate. This is when you step fully into the CMO role.

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Your task in Days 61-90 is to connect everything you've learned and demonstrated into a forward view, grounded in commercial reality, that leadership and partners can believe in.

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# Defining a clear growth narrative for the firm

Before strategy documents or detailed plans, what the firm needs most is clear growth narrative. This is a shared understanding of where growth will come from, which clients and sectors matter most, how collaboration can improve, and what capability or technology gaps need to be addressed. The narrative should be simple enough to repeat and strong enough to guide decisions.

## Build your growth narrative around three elements:

- **Define where revenue growth will come from.** Is it expanding relationships with existing clients? Entering new sectors or geographies? Building new service offerings? Improving win rates on competitive pitches? Be specific. Avoid vague statements about “raising the firm’s profile” or “increasing brand awareness”.
- **Identify the barriers to growth.** This is where your first 60 days of observation are valuable. Do partners work in silos and refrain from sharing client intelligence? Is your firm’s online presence mismatched to its capabilities? Is opportunity tracking so inconsistent that leadership can’t forecast revenue with confidence?
- **Articulate marketing’s role** in removing those barriers and accelerating growth. This is not about listing all the activities marketing will do. It’s about positioning marketing as the function that creates visibility, enables collaboration, and turns partner relationships into scalable growth.

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# Introducing the role of data, visibility, and CRM

By this stage, one pattern is usually clear. Even successful firms lack consistent visibility across client relationships. Without shared insight, growth depends heavily on individual memory and informal communication. This limits scale and creates risk.

Days 61-90 are therefore the right time to begin a measured, practical conversation about improving relationship and pipeline visibility, strengthening reporting that supports leadership decisions, ensuring marketing investment connects clearly to revenue, and evaluating whether their current CRM or tech stack truly supports growth.

## How to make the case for better infrastructure:

- **Don't lead with technology.** Rather, start with the business problem. Partners don't care about CRM platforms. They care about knowing which clients are at risk, which opportunities are likely to close, and where cross-selling potential exists.
- **Use specific examples** from your first 60 days. Did three different partners give you three different answers about a specific client relationship? Or was an opportunity lost because no one knew another practice area was already talking to the same prospect?
- **Frame data as a competitive advantage.** Firms that can see their pipeline clearly make better resource allocation decisions. They can forecast revenue with confidence and identify client retention risks before they become problems.
- **Start with quick wins** that demonstrate value before asking for major investment. You could be improving how event attendee lists are captured and followed up with or creating a simple dashboard that shows leadership which sectors are growing fastest.

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# Presenting your 90-day findings and 12-month roadmap

By Day 90, you should be ready to present a clear, structured plan to leadership and the partnership. This presentation becomes the foundation for everything that follows. Structure your plan in three parts:

- **Where we are.** Present what you've learned about the firm's current commercial position, growth patterns, marketing effectiveness, and infrastructure gaps. Be honest but constructive. Don't criticize what came before, rather focus on creating a shared understanding of the firm today.
- **What I've learned.** Share the key insights from your first 90 days. What surprised you? What opportunities exist that aren't being captured? What quick wins have you already demonstrated?
- **Where we're going.** Outline your proposed strategy and 12-month roadmap. Be specific about priorities, expected outcomes, resource requirements, and how success will be measured. This should be a marketing-enabled growth plan.

## Get alignment before you present

Before presenting to the full leadership team or partnership, socialize your plan with key stakeholders. You could share it with practice group leaders whose buy-in matters most, review it with the CFO to ensure budget expectations are realistic, or run it past influential partners who can champion it in internal discussions.

This allows you to say you've already aligned with key players when you present, dramatically increasing the likelihood of approval and reducing the risk of being derailed by unexpected objections.

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# Leading with confidence

As direction becomes clearer, your leadership presence must expand with it. You're now operating simultaneously in two spaces: guiding firmwide growth and investment decisions and continuing to lead a high-performing marketing and BD function.

Balance is critical. Strategy should feel connected to execution, and execution must feel guided by strategy. When both reinforce each other, your role becomes indispensable to the firm's future.

## How to balance strategic and operational leadership:

- **Reserve time for strategic thinking.** It's easy to get pulled into day-to-day execution, especially in the early months. Block time each week to step back, analyze patterns, and think about where the firm should be heading.
- **Delegate operational details to your team.** If you're still approving every social media post or editing every event invitation, you're operating at the wrong level. Trust your team to handle execution while you focus on direction.
- **Stay visible with partners.** Even as you become more strategic, maintain regular touchpoints with the partners who drive revenue. They need to see you as both a strategic thinker and someone who understands the practical realities of winning work.
- **Communicate progress consistently.** Establish a regular cadence of reporting to leadership. Whether it's monthly, quarterly, or tied to board meetings, make sure marketing's contribution to growth is visible and measurable.



## What success looks like by Day 90

Strong CMO transitions typically reach a recognizable point at the end of three months. You should expect to see marketing discussed in commercial rather than operational language, partners engaging in more intentional growth conversations, leadership aligned around emerging strategic priorities, clearer recognition of the need for relationship and revenue visibility, and growing confidence in your leadership across both strategy and function. Ultimately, your first 90 days should create the platform for years to come.

# Days 61-90 Checklist

## Clarifying direction

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- Define and communicate a simple growth narrative for the firm tied to specific revenue goals
- Align leadership around priority clients, sectors, and opportunities worth pursuing
- Outline the next 12-month focus for marketing and BD with clear milestones
- Build the business case for infrastructure improvements that enable growth
- Present your 90-day findings and strategic plan to leadership with evidence of early wins

## Strengthening visibility and infrastructure

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- Assess current reporting, data, and CRM effectiveness with specific gap analysis
- Identify where lack of relationship intelligence or pipeline clarity creates business risk
- Begin shaping a practical roadmap toward improved visibility that starts with quick wins
- Pilot one improvement that demonstrates the value of better data or systems
- Establish a regular reporting cadence that gives leadership confidence in future revenue

## Stepping fully into leadership

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- Balance strategic influence with operational excellence across the team
- Build confidence across partners, leadership, and your team through consistent delivery
- Position marketing clearly as part of the firm's growth engine, rather than a support function
- Establish yourself as a trusted advisor to partners on business development decisions
- Demonstrate that you can set direction and deliver results

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Chapter Four

# Beyond the first 90 days

## Moving from early credibility to sustained influence

Reaching Day 90 isn't the finish line. It's the point where your leadership truly begins.

By now, the firm has formed an initial view of you. Partners have experienced how you think, engage, and whether marketing under your leadership contributes to real commercial outcomes. Your team has adjusted to your expectations, and leadership has begun to test your perspective in broader conversations.

What happens next determines whether the CMO role becomes a respected strategic voice shaping the firm's future, or a capable operational function that never fully enters the partnership's inner circle.

The difference lies in how you convert early credibility into sustained influence.

# Deepening trust with partners and leadership

Influence inside a law firm is cumulative. It grows through repeated evidence that your judgment supports partner success and protects client relationships. The CMOs who earn lasting influence do so by making partners more successful.

This isn't about grand gestures or transformative campaigns. Trust is built through consistent, thoughtful behavior in the moments that matter. Partners are watching how you handle success and setbacks, whether you show up when critical decisions are being made, and whether you make their professional lives easier or more complicated. Beyond the first 90 days, your focus should shift toward consistent involvement in priority client and sector discussions, visible contribution to major pursuits and relationship strategy, and calm, commercially grounded advice during difficult decisions.

## Here's how you can continue to build long-term trust:

- **Make partners look good.** When partners succeed in winning work or expanding a client relationship, you should give them the credit, while also making sure marketing support is visible. When they take your advice and it works, celebrate their judgment to follow it.
- **Be consistently available for the conversations that matter.** If a major pitch is being prepared, show up to the strategy sessions. If a key client relationship is at risk, offer to help develop a retention plan. Partners need to see you as someone who's there when it counts.
- **Speak their language.** Don't talk about marketing metrics that partners don't care about. Talk about revenue, client relationships, competitive positioning, and business development effectiveness. Frame everything in terms of winning work and protecting relationships.
- **Build your reputation** as someone who makes good decisions under pressure. When a crisis happens, whether it's a reputational issue or a major opportunity that needs a fast response, be the calm voice that provides clear thinking and practical solutions.

# Building a high-performing marketing function

As your strategic influence grows, don't let the operational foundation slip. The marketing and BD function must consistently execute the basics while also driving innovation and improvement.

This means continuing to refine team structure and capabilities, implementing proper measurement and reporting systems, ensuring consistent quality across all marketing outputs, building stronger processes that can scale, and creating a culture of commercial focus.

## Focus on these operational actions:

- **Professionalize the function.** If marketing has historically been seen as “helping partners with presentations,” elevate it to a strategic function that drives growth. This means clearer role definitions, better tools, stronger processes, and higher expectations.
- **Invest in your team's development.** Law firm marketing roles can feel isolating and under-resourced. Make sure your team has access to training, industry connections, and professional development opportunities.
- **Build systems that don't depend on heroic effort.** If every pitch requires someone working late nights to pull together materials, the process is broken. Create templates, libraries, and workflows that make excellence repeatable.
- **Measure what matters and report it consistently.** Move beyond activity metrics to outcome metrics. What % of pitches are won/lost? How much revenue is generated from marketing-sourced opportunities? How many at-risk clients are retained through proactive engagement?

# Positioning marketing as a growth engine

The ultimate goal for marketing is to be seen as essential to the firm's growth strategy.

This requires demonstrating clear ROI on marketing investment, creating visibility into how marketing contributes to revenue, positioning yourself as a key advisor on strategic growth decisions, and ensuring marketing has a seat at the table when major firm decisions are being made.

## How to achieve this positioning:

- **Connect marketing activities directly to revenue outcomes.** When a campaign leads to new client conversations, track it. When thought leadership creates inbound inquiries, measure it. When better CRM data helps close a cross-selling opportunity, document it.
- **Present to the partnership regularly.** Don't wait for an annual marketing update. Give the partnership quarterly insights into what's working, what you're learning, and how marketing is contributing to growth. Make these presentations about business development success, not marketing activity.
- **Champion initiatives that partners care about.** If the firm wants to expand into a new geography, make marketing the function that enables it. If a major client relationship needs strengthening, let marketing build the engagement strategy.
- **Solve problems that no one else is solving.** Find the gaps and fill them. That could be something like creating better competitive intelligence, building stronger client feedback mechanisms, or improving how the firm identifies and responds to opportunities.



# Avoiding common pitfalls

Even after a strong first 90 days, CMOs can stumble. Here are the most common pitfalls to avoid:

- **Moving too fast without continued buy-in.** Just because you had support for your 90-day plan doesn't mean you have a permanent license to make changes. Keep building consensus, especially as you tackle more significant transformation.
- **Losing touch with the revenue reality.** It's easy to get pulled into brand work, internal communications, or other activities that feel important but don't drive growth. Stay ruthlessly focused on what matters most to the partnership: winning and keeping clients.
- **Promising results you can't control.** Marketing can influence revenue, but it can't guarantee it. Be careful about over-promising, especially on new initiatives. Set realistic expectations and then over-deliver.
- **Neglecting the team while focusing on strategy.** Your team needs ongoing attention, support, and leadership. If you become so focused on strategic conversations with partners that you stop supporting your team, performance will slip.
- **Forgetting that relationships are your real currency.** In a partnership, technical competence is table stakes. What really matters is whether partners trust you, respect your judgment, and want you to be involved in their most important decisions.

# Final thoughts

Your first 90 days set the foundation, but CMO success in a law firm is measured over years, not months. Partnerships move at a deliberate pace, and for good reason. Your role is to respect that pace while still pushing for meaningful progress. The transformation you're building won't happen overnight, and that's not a weakness of your approach. It's the reality of leading change in an environment where trust and consensus matter as much as strategy.

Stay focused on the fundamentals that drive partner confidence: revenue growth, client relationships, and partner success. Everything else is secondary. The marketing activities that don't connect to these outcomes, no matter how creative or well-executed, will struggle to maintain support. But when you consistently demonstrate how marketing contributes to what partners care about most, you become indispensable.

The best CMOs in law firms are the ones partners can't imagine the firm functioning without. They're in the room when strategic decisions are being made. They're consulted when major opportunities arise. They're trusted to solve problems that extend well beyond traditional marketing boundaries. If you've built the right foundation in your first 90 days, you're well-positioned to earn that kind of influence over time.



## Summary

# Your complete 90-day roadmap

## Days 1-30: Foundation

- Understand how the firm really works and where revenue comes from
- Build relationships across leadership, partners, and your team
- Audit existing marketing capabilities and identify gaps
- Listen more than you speak and demonstrate commercial curiosity

## Days 31-60: Momentum

- Deliver quick wins that matter to partners and demonstrate marketing's value
- Strengthen team clarity, confidence, and capability
- Begin strategic conversations about growth with leadership
- Show evidence that marketing can influence revenue outcomes

## Days 61-90: Direction

- Present a clear growth narrative grounded in evidence from your first 60 days
- Build the case for better data, visibility, and infrastructure
- Outline your 12-month roadmap with specific priorities and expected outcomes
- Step fully into strategic leadership while maintaining operational excellence

## Beyond Day 90: Influence

- Deepen trust through consistent delivery and commercial focus
- Build a high-performing marketing function that can scale
- Position marketing as essential to the firm's growth strategy
- Become the trusted advisor partners turn to for growth decisions

# About Nexl

Nexl turns your BD strategy into daily action.

Nexl is the growth system for law firms that connects CRM, workspaces, marketing, and relationship intelligence in one platform, so business development stops being a plan and starts becoming execution.

Unlike traditional CRMs that sit unused, Nexl is designed for how lawyers actually work, with an Outlook plugin and mobile app that fit seamlessly into their day. It also automatically maps who-knows-who across the entire firm - without ever reading lawyers' emails - giving leadership firmwide visibility into relationship strength and opportunity.

And instead of juggling 3–4 disconnected tools, Nexl replaces your CRM, relationship intelligence, email marketing, and event management with one purpose-built system that delivers value fast, with rapid implementation and innovation built on our own tech stack.

Nexl makes every lawyer a growth contributor and turns BD into something firms actually execute.





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Nexl is a leading provider of innovative legal technology solutions aimed at creating efficiencies, accelerating growth and providing data-driven insights that drive smart decision making. We offer scalable solutions for law firms of all shapes and sizes. Founded by legal professionals with vast experience working within legal firms, Nexl grew out of a desire to fundamentally change the way that legal firms grow and engage with internal and external stakeholders. The existing way of managing these relationships doesn't work. Today, we're driving the delivery of smart, innovative and technology-driven services to clients worldwide. Smart, insight-driven solutions underpin Nexl's purpose. Drawing from our own practical experience working within the professional services industry, our purpose is to develop and deliver technology solutions that will drive positive change in how law firms manage their client relationships and grow their practice.

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