Law Firm Chief Information Officer (CIO) & Chief Technology Officer (CTO)

Executive Career Transition Discovery Questionnaire

Purpose

This assessment is designed for senior technology leaders within large law firms. It helps CIOs and CTOs evaluate what they truly want in their next leadership opportunity while providing executive recruiters with insight into the executive's priorities, motivations, leadership style, technology vision, and ideal organizational fit.

SECTION 1 – CURRENT ROLE SATISFACTION

1. Current Title

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2. Firm Name

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3. Number of Attorneys in Your Firm

- ☐ Under 250
- ☐ 250–500
- ☐ 500–1,000
- ☐ 1,000–2,000
- ☐ 2,000+

4. Which areas currently fall under your responsibility?

(Check all that apply)

- ☐ IT Operations
- ☐ Infrastructure & Cloud
- ☐ Cybersecurity
- ☐ Enterprise Applications
- ☐ AI Strategy
- ☐ Data & Analytics
- ☐ Knowledge Management
- ☐ Innovation
- ☐ Software Development
- ☐ Service Delivery
- ☐ IT Governance
- ☐ Vendor Management
- ☐ Enterprise Architecture
- ☐ Digital Transformation
- ☐ Litigation Technology
- ☐ eDiscovery
- ☐ Information Security
- ☐ Business Continuity
- ☐ Project Management Office
- ☐ Technology Budgeting

5. What aspects of your current role do you enjoy most?

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6. What aspects of your current role are most frustrating?

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7. How satisfied are you in your current position?

1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10 ☐

8. What would most likely motivate you to consider a career move?

(Check all that apply)

- ☐ Greater executive influence
- ☐ More strategic responsibility
- ☐ Larger technology budget

- ☐ AI leadership opportunities
- ☐ Better compensation
- ☐ Stronger executive leadership team
- ☐ More innovative culture
- ☐ Firm growth trajectory
- ☐ Better work-life balance
- ☐ Global technology leadership
- ☐ Opportunity to build a modern technology organization
- ☐ Reduced bureaucracy
- ☐ Succession opportunity

SECTION 2 – EXECUTIVE LEADERSHIP & GOVERNANCE

9. To whom do you currently report?

- ☐ Managing Partner
- ☐ Executive Director
- ☐ COO
- ☐ CEO
- ☐ Executive Committee
- ☐ Other _____

10. In your ideal role, where would technology leadership reside within the firm?

- ☐ Core strategic leadership function
- ☐ Equal partner with firm leadership
- ☐ Direct advisor to managing partner
- ☐ Technology represented on executive committee
- ☐ Technology as a business enabler rather than support function

11. How important is executive leadership support for technology initiatives?

- ☐ Critical
- ☐ Very Important
- ☐ Important
- ☐ Somewhat Important

12. What leadership style do you work best with?

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13. What organizational obstacles have limited your success?

SECTION 3 – TECHNOLOGY STRATEGY & INNOVATION

14. Which strategic initiatives are most important to you in your next role?

(Rank Top 5)

Rank	Initiative
___	AI Strategy & Governance
___	Digital Transformation
___	Cybersecurity
___	Cloud Modernization
___	Data Strategy
___	Knowledge Management
___	Innovation Programs
___	Enterprise Applications
___	Automation
___	Practice Technology
___	Client-Facing Technology
___	Technology Governance

Rank	Initiative
___	Operational Excellence
___	Technology Talent Development
___	M&A Technology Integration

15. What technology accomplishments are you most proud of?

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16. What major technology challenges are you most interested in solving?

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17. Which areas best reflect your strengths?

(Check all that apply)

- ☐ Strategic Planning
- ☐ AI Leadership
- ☐ Cybersecurity
- ☐ Innovation
- ☐ Digital Transformation
- ☐ Infrastructure
- ☐ Cloud Technologies
- ☐ Data Analytics
- ☐ Knowledge Management
- ☐ Change Management
- ☐ Technology Operations
- ☐ Team Leadership
- ☐ Vendor Management
- ☐ Financial Management
- ☐ Executive Influence

SECTION 4 – LAW FIRM TECHNOLOGY MATURITY

18. What type of technology environment interests you most?

- ☐ Highly innovative market leader
- ☐ Transformation opportunity
- ☐ Modernization initiative
- ☐ High-growth platform
- ☐ Global technology organization
- ☐ AI-focused organization
- ☐ Operational excellence environment

19. What level of technology sophistication are you seeking?

- ☐ Emerging
- ☐ Developing
- ☐ Mature
- ☐ Industry Leading

20. Which organizational characteristics are most important?

(Rank Top 10)

Rank	Characteristic
___	Strong Executive Leadership
___	Innovation Culture
___	AI Investment
___	Technology Investment
___	Strategic Vision
___	Financial Strength
___	Growth Strategy
___	Collaboration
___	Data-Driven Decision Making
___	Global Platform
___	Modern Infrastructure

Rank	Characteristic
___	Cybersecurity Commitment
___	Change Readiness
___	Talent Development
___	Transparency

21. What would be a deal breaker?

SECTION 5 – TEAM, RESOURCES & BUDGET

22. Ideal IT Organization Size

- ☐ Under 20 employees
- ☐ 20–50 employees
- ☐ 50–100 employees
- ☐ 100–200 employees
- ☐ 200+

23. What resources are critical for success?

(Check all that apply)

- ☐ Dedicated Innovation Team
- ☐ AI Specialists
- ☐ Cybersecurity Team
- ☐ Data Analytics Team
- ☐ Knowledge Management Team
- ☐ PMO
- ☐ Enterprise Architects
- ☐ Software Developers
- ☐ Training & Adoption Team
- ☐ Change Management Resources

24. What level of budget authority would you expect?

25. What is your preferred role in technology investment decisions?

- ☐ Final decision maker
- ☐ Executive leadership partner
- ☐ Primary advisor
- ☐ Shared governance model

SECTION 6 – AI, DATA & FUTURE OF LEGAL TECHNOLOGY

26. How important is AI leadership in your next role?

1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10 ☐

27. Which emerging areas are most exciting to you?

(Check all that apply)

- ☐ Generative AI
- ☐ Legal AI Applications
- ☐ Knowledge Management
- ☐ Data Analytics
- ☐ Automation
- ☐ Client Experience Platforms
- ☐ Predictive Analytics
- ☐ Legal Operations Technology
- ☐ Cybersecurity
- ☐ Digital Workplace

28. What role should technology play in a law firm's competitive advantage?

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29. How would you describe your leadership philosophy regarding AI adoption?

SECTION 7 – COMPENSATION & CAREER ASPIRATIONS

30. Which compensation elements are most important?

(Rank in order)

Rank	Component
___	Base Salary
___	Annual Bonus
___	Long-Term Incentive
___	Deferred Compensation
___	Profit Sharing
___	Retirement Benefits
___	Sign-On Bonus
___	Severance Protection

31. What minimum compensation would justify a move?

_____

32. What are your top three career goals for the next five years?

1. _____
2. _____
3.

33. Which future opportunities appeal to you?

(Check all that apply)

- ☐ Global CIO
- ☐ Global CTO
- ☐ Chief Digital Officer
- ☐ Chief AI Officer
- ☐ Chief Innovation Officer
- ☐ COO Track
- ☐ CEO/Executive Director Track
- ☐ Board Service
- ☐ Consulting/Advisory Work

SECTION 8 – RECRUITER INSIGHT QUESTIONS

34. What differentiates you from other law firm technology leaders?

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35. What types of law firms benefit most from your expertise?

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36. Describe your ideal Managing Partner, COO, or Executive Director.

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37. Describe the type of law firm you would never join.

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38. If the ideal opportunity became available today, what would it look like?

Executive Prioritization Exercise

Rate each factor from **1 (Low Importance)** to **10 (Critical)**.

Factor	Rating
Compensation	___
Executive Influence	___
AI Leadership Opportunity	___
Technology Investment	___
Innovation Culture	___
Firm Reputation	___
Strategic Authority	___
Growth Opportunity	___
Work-Life Balance	___
Cybersecurity Commitment	___
Data & Analytics Strategy	___
Technology Team Quality	___
Executive Leadership Quality	___
Career Advancement	___

Recruiter Assessment Summary

Primary Motivators

Top 5 Decision Criteria

Deal Breakers

AI & Innovation Priorities

Compensation Expectations

Ideal Firm Profile

Long-Term Career Objectives

Search Readiness

- ☐ Actively Looking
- ☐ Open to Conversations
- ☐ Passive Candidate
- ☐ Exceptional Opportunity Only

Recruiter Notes

This version is tailored to the issues driving career decisions among CIOs and CTOs at Am Law top 200 law firms: AI governance, cybersecurity, digital transformation, executive influence, technology investment, innovation culture, data strategy, and the increasing role of technology as a competitive differentiator for legal services organizations.