Law Firm Chief Marketing Officer (CMO) & Chief Business Development Officer (CBDO)

Career Transition Discovery Questionnaire

Purpose

This assessment is designed specifically for senior marketing and business development leaders in large law firms. It helps executives identify the factors that would motivate a career move and enables recruiters to better align opportunities with their leadership style, growth objectives, compensation expectations, and long-term career aspirations.

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 responsibilities occupy the majority of your time?

(Check all that apply)

- ☐ Strategic Planning
- ☐ Business Development
- ☐ Revenue Growth Initiatives
- ☐ Client Development
- ☐ Practice Group Strategy
- ☐ Key Client Programs
- ☐ Competitive Intelligence
- ☐ Marketing Technology
- ☐ CRM Management
- ☐ Proposal/RFP Strategy
- ☐ Lateral Integration
- ☐ Cross-Selling Programs
- ☐ Thought Leadership
- ☐ Branding & Communications
- ☐ Team Leadership
- ☐ Budget Management

5. What aspects of your current role are most fulfilling?

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

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7. How satisfied are you with your current position?

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

8. What would most likely cause you to explore a new opportunity?

(Check all that apply)

- ☐ Increased influence within firm leadership
- ☐ Better compensation
- ☐ Larger platform
- ☐ Greater strategic responsibility
- ☐ Stronger firm leadership
- ☐ Better culture
- ☐ More sophisticated marketing function

- ☐ Growth opportunities
- ☐ Reduced internal politics
- ☐ Succession opportunity
- ☐ Better work-life balance
- ☐ Geographic considerations

SECTION 2 – FIRM LEADERSHIP & CULTURE

9. What characteristics define your ideal law firm culture?

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10. How important is attorney engagement in marketing and business development efforts?

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

11. Which statement best describes your preferred environment?

- ☐ Attorneys actively embrace business development
- ☐ Attorneys are coachable but require guidance
- ☐ Firm is undergoing cultural transformation
- ☐ Entrepreneurial growth environment
- ☐ Mature, sophisticated platform

12. What level of support do you expect from firm leadership?

- ☐ Full executive partnership
- ☐ Significant support
- ☐ Moderate support
- ☐ Independent leadership role

13. What leadership style do you work best under?

SECTION 3 – STRATEGIC PRIORITIES

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

(Rank Top 5)

Rank	Initiative
___	Revenue Growth
___	Client Expansion
___	Market Positioning
___	Practice Growth
___	Lateral Integration
___	Cross-Selling
___	Pricing Strategy
___	AI & Marketing Technology
___	Data Analytics
___	Client Experience Programs
___	Key Client Management
___	Brand Development
___	International Expansion
___	Industry Team Growth

15. Which accomplishments are you most proud of?

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16. What business challenges are you most interested in solving?

17. Which of the following best describes your strengths?

(Check all that apply)

- ☐ Strategic Planning
- ☐ Business Development
- ☐ Revenue Growth
- ☐ Client Development
- ☐ Team Building
- ☐ Practice Group Strategy
- ☐ Marketing Technology
- ☐ Data Analytics
- ☐ Communications
- ☐ Change Management
- ☐ Attorney Coaching
- ☐ Executive Leadership

SECTION 4 – ORGANIZATIONAL PREFERENCES

18. What type of firm interests you most?

- ☐ AmLaw 25
- ☐ AmLaw 50
- ☐ AmLaw 100
- ☐ AmLaw 200
- ☐ Regional Firm
- ☐ Global Firm
- ☐ Growth-Oriented Firm
- ☐ Boutique Firm

19. What organizational characteristics are most important?

(Rank Top 10)

Rank	Characteristic
___	Strong Leadership
___	Financial Performance
___	Growth Strategy
___	Collaborative Culture
___	Marketing Sophistication
___	Innovation Mindset
___	Investment in Technology
___	Data-Driven Decision Making
___	Reputation
___	Client Focus
___	Attorney Engagement
___	Transparency
___	Diversity & Inclusion
___	National Reach
___	International Presence

20. What would be a deal breaker?

SECTION 5 – TEAM & RESOURCE EXPECTATIONS

21. Ideal Marketing/Business Development Team Size

- ☐ Under 10
- ☐ 10–25
- ☐ 25–50
- ☐ 50–100
- ☐ 100+

22. Which resources are critical to your success?

(Check all that apply)

- ☐ Marketing Automation
- ☐ CRM Platform
- ☐ Data Analytics Team
- ☐ Competitive Intelligence
- ☐ Client Feedback Program
- ☐ Dedicated Proposal Team
- ☐ Business Development Managers
- ☐ Industry Marketing Teams
- ☐ Digital Marketing Team
- ☐ Events Team
- ☐ PR/Communications Team

23. What level of budget authority do you expect?

SECTION 6 – COMPENSATION & INCENTIVES

24. Which compensation elements are most important?

(Rank in order)

Rank	Component
___	Base Salary
___	Annual Bonus
___	Performance Incentives
___	Long-Term Incentives
___	Profit Sharing
___	Deferred Compensation
___	Retirement Benefits
___	Severance Protection

25. What minimum compensation would justify a move?

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26. Would you consider a role with lower guaranteed compensation for substantial upside potential?

- ☐ Yes
- ☐ No
- ☐ Depends on structure

SECTION 7 – CAREER ASPIRATIONS

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

1.

2.

3.

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28. Which future opportunities appeal to you?

- ☐ Global CMO Role
- ☐ Chief Business Development Officer
- ☐ Firm Executive Committee
- ☐ Chief Strategy Officer
- ☐ Chief Growth Officer
- ☐ COO Track
- ☐ CEO/Executive Director Track
- ☐ Board Service
- ☐ Consulting/Advisory Work
- ☐ Other:

29. What professional legacy would you like to leave?

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30. What experiences do you still want to gain?

SECTION 8 – RECRUITER INTELLIGENCE

31. What differentiates you from other senior marketing and business development leaders?

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32. What types of firms benefit most from your expertise?

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33. Describe the ideal managing partner or firm chair you would like to work with.

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34. Describe the type of firm you would never join.

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35. If the perfect opportunity became available today, what would it look like?

Executive Prioritization Exercise

Please rate the importance of each factor from **1 (Not Important)** to **10 (Critical).**

Factor	Rating
Compensation	___
Firm Culture	___
Leadership Quality	___
Strategic Influence	___
Growth Opportunity	___
Brand Reputation	___
Work-Life Balance	___
Marketing Sophistication	___
Attorney Engagement	___
Technology Investment	___
Career Advancement	___
Geographic Preference	___

Recruiter Summary Page

Primary Motivators

Top 5 Decision Criteria

Deal Breakers

Compensation Expectations

Target Firm Profile

Long-Term Career Goals

Search Readiness

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

This version is designed specifically around the issues that most often drive career decisions among AmLaw top 200 CMOs and CBDOs: attorney engagement, firm leadership alignment, revenue growth responsibility, marketing sophistication, technology investment, client development strategy, and executive influence. It tends to uncover motivations that generic executive questionnaires often miss.