LAW FIRM CFO CAREER TRANSITION GUIDE

A Practical Checklist for Navigating Your Next Executive Opportunity

Prepared by ASG Legal Search and Staffing
Executive Search Exclusively Serving the AmLaw 200

INTRODUCTION

A successful law-firm CFO career is built on much more than accounting and financial reporting. Today's leading firms need financial executives who can help drive growth, improve profitability, manage risk, optimize cash flow, lead transformation, leverage technology and serve as strategic partners to firm leadership.

For an experienced CFO considering a career transition, the challenge is often not a lack of qualifications. It is making sure the market understands **the scale of your experience, the business problems you solve and the value you can bring to your next firm.**

This guide provides a practical framework for positioning yourself, expanding your network and conducting a more effective executive-level search.

PART I — EXECUTIVE POSITIONING CHECKLIST

☐ Define your executive value proposition

Be able to explain in one or two sentences:

What are you exceptionally good at?

Examples:

- Improving law-firm profitability and financial performance
- Supporting rapid revenue growth
- Building sophisticated finance organizations
- Leading global finance operations
- Improving billing and collections
- Partnering with managing partners and executive committees
- Leading financial transformation
- Implementing finance technology and analytics
- Supporting mergers, combinations and integrations
- Developing high-performing finance teams

Your objective is to communicate **business impact**, not simply responsibilities.

☐ Identify your 5–7 most significant accomplishments

Quantify them whenever possible.

Consider:

- Revenue growth
- PPEP improvement
- Revenue-per-lawyer improvement
- Collection improvements
- DSO reduction
- Cost savings
- Cash-flow improvement
- Finance-team growth
- Technology implementations
- M&A activity
- Global expansion
- Process improvements
- Organizational transformation

Ask yourself:
“What measurable difference did I make?”

PART II — RESUME & EXECUTIVE PROFILE

☐ Rework your résumé around accomplishments

Your résumé should demonstrate what changed because of your leadership.

Instead of:

Responsible for accounting, FP&A, treasury and tax.

Consider:

Led a global finance organization overseeing accounting, FP&A, treasury, tax and revenue management while supporting significant firmwide revenue and profitability growth.

☐ Create a one-page confidential executive profile

A confidential profile can be particularly useful when networking within the legal industry.

Include:

Executive Level: CFO / Global CFO / CFO-COO / Senior Finance Executive

Industry: AmLaw / Legal / Professional Services

Scale: Revenue, attorneys, employees, geographic footprint

Leadership: Size and scope of organization managed

Business Impact: 4–6 quantified accomplishments

Expertise: Finance, profitability, transformation, technology, M&A, etc.

Target: Type of organization and leadership opportunity sought

☐ Make sure your LinkedIn profile matches your résumé

Review:

- Headline
- About section
- Career history
- Accomplishments
- Skills
- Recommendations
- Professional photograph

- Contact information

Your LinkedIn profile should communicate the same executive brand as your résumé.

PART III — BUILD YOUR TARGET MARKET

☐ Don’t limit the search to advertised CFO openings

At the senior executive level, many opportunities originate through relationships, executive recruiters, boards and confidential conversations.

Develop a target list of organizations that could potentially benefit from your experience.

Consider:

- AmLaw 100 firms
- AmLaw 200 firms
- Large international firms
- Large regional firms
- Professional-services organizations
- Accounting/advisory firms
- Legal technology companies
- Alternative legal-service organizations
- Private-equity-backed professional-services companies

☐ Build a list of 50–100 target organizations

For each organization, identify:

Firm → Managing Partner → COO → Current CFO → HR/Chief People Officer → Executive Committee → Relevant Recruiters

Track:

- Organization
- Contact
- Position
- Relationship
- Last contact
- Next action
- Potential opportunity

- Notes

PART IV — ACTIVATE YOUR NETWORK

☐ Make a list of people who know your work

Include:

- Former managing partners
- Former colleagues
- Law-firm executives
- CFOs
- COOs
- CEOs
- Partners
- Board members
- Attorneys
- Consultants
- Investment bankers
- Bankers
- Technology executives
- Executive recruiters
- Accounting professionals

☐ Personally contact 5–10 people each week

Don’t simply announce:

“I’m looking for a job.”

Instead, explain what you are looking for and the value you bring.

Your objective is to generate **conversations and introductions**, not immediately ask for a position.

☐ Ask for introductions

A strong networking question is:

“Who are two or three law-firm leaders you think I should know as I explore my next opportunity?”

A referral can be considerably more valuable than another résumé submission.

PART V — BUILD YOUR EXECUTIVE VISIBILITY

☐ Establish yourself as a subject-matter expert

Consider sharing thoughtful perspectives on:

- Law-firm profitability
- Partner compensation
- Financial forecasting
- Revenue management
- Billing and collections
- Cash conversion
- Finance technology
- AI and financial analytics
- Law-firm M&A
- Global expansion
- Finance organizational design
- Leadership development
- Strategic planning

The objective isn't to announce that you're looking for a job.

The objective is to demonstrate:

"This is a CFO who understands how to run and grow a sophisticated law firm."

☐ Engage with law-firm leadership on LinkedIn

Each week:

☐ Comment on relevant posts
☐ Share an industry observation
☐ Congratulate executives on promotions
☐ Comment on law-firm growth announcements
☐ Engage with relevant legal-industry publications
☐ Connect with appropriate executives

PART VI — WORK WITH EXECUTIVE RECRUITERS

☐ Identify recruiters who understand your market

Look for recruiters with experience placing:

- Law-firm CFOs
- COOs
- CMOs/CBDOs
- CIOs/CTOs
- C-level professional-services executives
- Senior finance executives

☐ Don’t send every recruiter the same résumé

Your introduction should quickly answer:

Who are you?

What scale have you operated at?

What makes you different?

What type of opportunity are you seeking?

What organizations would benefit from your background?

☐ Maintain recruiter relationships even when there isn’t an immediate opening

A recruiter who understands your background today may know about a confidential opportunity several months from now.

PART VII — EXPAND THE DEFINITION OF YOUR NEXT OPPORTUNITY

If the traditional CFO search isn’t producing the right opportunity, consider whether your experience translates to adjacent roles.

Potential opportunities include:

☐ CFO
☐ Global CFO
☐ CFO/COO
☐ Chief Administrative Officer
☐ Chief Transformation Officer
☐ COO
☐ Managing Director
☐ Professional-Services CFO
☐ Interim CFO
☐ Fractional CFO
☐ Finance Transformation Executive
☐ Strategic Finance Advisor

The goal isn't to abandon the CFO path.

It is to recognize that **senior finance leadership experience can create value beyond one title.**

PART VIII — PREPARE FOR EXECUTIVE INTERVIEWS

Be prepared to answer:

☐ Why are you considering a transition?

☐ What are you looking for in your next organization?

☐ What is your greatest accomplishment?

☐ How have you improved profitability?

☐ How have you improved revenue or collections?

☐ How have you worked with managing partners?

☐ How have you handled challenging partners or stakeholders?

☐ How have you transformed a finance organization?

☐ How have you used technology and data?

☐ What would you evaluate during your first 100 days?

☐ What would your previous managing partner say about you?

☐ Why should we hire you?

PART IX — DEVELOP YOUR "FIRST 100 DAYS" PLAN

A strong CFO candidate should be able to articulate what he or she would evaluate after joining a new firm.

FIRST 30 DAYS — UNDERSTAND

☐ Firm strategy
☐ Financial performance
☐ Organizational structure
☐ Partner economics
☐ Finance organization
☐ Reporting infrastructure
☐ Technology environment
☐ Billing and collections
☐ Key stakeholder relationships

DAYS 31–60 — DIAGNOSE

☐ Identify financial opportunities
☐ Evaluate profitability
☐ Review revenue leakage
☐ Assess billing performance
☐ Review forecasting
☐ Evaluate finance talent
☐ Identify technology opportunities
☐ Identify operational inefficiencies

DAYS 61–100 — PRIORITIZE

☐ Establish strategic priorities
☐ Identify quick wins
☐ Develop financial-performance metrics
☐ Establish leadership expectations
☐ Create transformation roadmap
☐ Communicate priorities to firm leadership

PART X — IF THE SEARCH ISN'T WORKING, DIAGNOSE THE FUNNEL

Don't automatically respond to a slow search by sending more résumés.

Track the process:

Target Organizations

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Executive Contacts

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Conversations

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Recruiter Introductions

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Interviews

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Finalist Opportunities

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Offers

Ask yourself:

Few conversations?
Your positioning or networking strategy may need adjustment.

Many conversations but few interviews?
Your executive profile may not be communicating the right value proposition.

Many interviews but few finalist opportunities?
Evaluate your interview positioning and executive narrative.

Repeated finalist opportunities without offers?
Examine whether there are recurring concerns around role fit, expectations, compensation, organizational fit or another factor.

Treat your career search like a **strategic business-development pipeline.**

YOUR 30-DAY EXECUTIVE SEARCH CHECKLIST

WEEK 1 — POSITION

☐ Update résumé
☐ Update LinkedIn
☐ Create executive bio
☐ Define target roles
☐ Identify top accomplishments
☐ Develop your executive value proposition

WEEK 2 — TARGET

☐ Identify 50 target organizations
☐ Identify 25 key decision-makers
☐ Identify 10 executive recruiters
☐ Research potential industry opportunities

WEEK 3 — CONNECT

☐ Contact 10 professional relationships
☐ Contact 5 recruiters

☐ Request 3 introductions
☐ Schedule networking conversations
☐ Begin engaging with relevant LinkedIn content

WEEK 4 — BUILD MOMENTUM

☐ Follow up with contacts
☐ Evaluate responses
☐ Refine your positioning
☐ Expand target organizations
☐ Continue recruiter outreach
☐ Review your search pipeline

THE BOTTOM LINE

A senior law-firm CFO should not approach a career transition as simply an exercise in **finding an open position.**

The strongest strategy is to create a compelling executive story, identify organizations where that experience can create value, activate trusted relationships and make it easy for decision-makers and recruiters to understand what you bring to the table.

Remember:

You are not simply looking for your next job.

You are identifying the organization where your experience can have the greatest professional impact.

ABOUT ASG LEGAL SEARCH AND STAFFING

ASG Legal Search and Staffing focuses exclusively on executive placement within the AmLaw 200 marketplace.

We work with law firms and senior executives on C-level and director-level leadership opportunities, including CFO, COO, CMO/CBDO, CIO, CTO, CKO, Chief Innovation, AI, Data and other critical executive leadership positions.

Our search model is **contingency-based rather than retained**, giving firms an opportunity to review and compare qualified executive candidates without the traditional upfront retained-search commitment.

For executives, our objective is to understand your experience, career goals and leadership value—and connect you with opportunities that align with your background and aspirations.

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