Managing Partner's Search Preparation Checklist

For CFO, COO, CIO, CMO/Chief Business Development Officer, CHRO, CAO and other senior leadership positions

1. DEFINE THE BUSINESS NEED

☐ Why are we hiring for this position now?
☐ Is this a replacement, succession, or newly created position?
☐ What are the **3–5 most important things** we need this executive to accomplish?
☐ What problems should this person solve in the first 12 months?
☐ How will we measure success?

2. DEFINE THE ROLE

☐ Confirm title, reporting relationship and organizational structure
☐ Identify key responsibilities and decision-making authority
☐ Determine number and level of direct reports
☐ Clarify relationships with the Executive Committee, Managing Partners and other C-level leaders
☐ Determine travel, office and hybrid-work expectations
☐ Identify any confidentiality requirements

3. DEFINE THE IDEAL CANDIDATE

☐ What experience is **required** versus preferred?
☐ Is large-law-firm experience necessary?
☐ What size/type of organization should the candidate have led?
☐ Which industries or professional-services backgrounds should be considered?
☐ Identify the 5–7 most important leadership qualities
☐ Consider strategic thinking, executive presence, partner management and change leadership
☐ Define cultural fit and leadership style

4. UNDERSTAND THE OPPORTUNITY

☐ What makes this position compelling to a high-performing executive?
☐ What strategic initiatives will the executive lead?
☐ What growth or transformation opportunities exist?

☐ What is the firm's competitive position and growth trajectory?
☐ What challenges or concerns might cause a candidate to decline?

5. ESTABLISH COMPENSATION

☐ Establish a competitive base-salary range
☐ Determine bonus/incentive opportunity
☐ Identify deferred compensation or other executive benefits
☐ Determine relocation assistance, if applicable
☐ Confirm flexibility for an exceptional candidate
☐ Benchmark compensation against comparable law firms

6. AGREE ON THE SEARCH PROCESS

☐ Identify the Managing Partner / Executive Committee members involved
☐ Determine who has final hiring authority
☐ Establish interview stages and decision-making process
☐ Establish target timeline
☐ Determine who will communicate with candidates
☐ Agree on confidentiality and candidate communication protocols

7. SELECT YOUR SEARCH PARTNER

Before beginning the search, ask:

☐ Does the recruiter understand the **law firm executive market**?
☐ Do they have access to C-level candidates who are not actively job searching?
☐ How will they identify and evaluate candidates?
☐ How will they protect confidentiality?
☐ How frequently will they provide market and search updates?
☐ What happens if the initial candidate pool does not produce the right executive?

BEFORE LAUNCHING THE SEARCH

The five questions every firm should be able to answer:

1. Why does this position matter to the firm's future?

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2. What must the new executive accomplish?

3. What type of leader will succeed in our culture?

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4. Why would a top executive leave their current position to join us?

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5. What does success look like 12 months after the hire?

BEST PRACTICE

Don’t begin with the candidate. Begin with the business problem.
The strongest executive searches clearly define the firm’s objectives, the executive’s mandate, the leadership profile and the reasons a high-caliber candidate would want to make the move.