

30-60-90 Day Plan Overview

Candidate: Travis Wools – Chief Marketing Officer
Target Role: Chief Marketing Officer, UB Greensfelder LLP

30 – First 30 Days – Discovery & Alignment

Establish trust, gain deep understanding of firm culture, operations, and brand position.

- Meet with Managing Partner, COO, Practice Group Leaders, and BD/Marketing staff to understand strategic priorities.
- Conduct listening sessions with attorneys and staff across regions (Chicago, St. Louis, Cincinnati, Cleveland, Columbus, New York).
- Review marketing/communications strategy, website, digital assets, Chambers/Benchmark rankings, and PR footprint.
- Analyze competitive positioning against peer AmLaw 200 firms.
- Evaluate current marketing/BD team, budgets, and vendor relationships.
- Assess CRM/data/analytics capabilities.
- Quick Wins: streamline communication cadence; resolve one execution pain point (e.g., practice group collateral refresh).

60 – Next 60 Days – Strategy Design & Early Implementation

Begin shaping and rolling out a firm-wide marketing and BD roadmap.

- Present draft Marketing & BD Strategy Roadmap to leadership.
- Align goals with strategic plan, practice group targets, and client priorities.
- Design client-feedback and satisfaction loop to strengthen relationships and surface cross-selling opportunities.
- Initiate thought leadership platform (blogs, webinars, white papers).
- Optimize website for UX, SEO, and attorney visibility.
- Create PR/media plan to spotlight merger success and recognitions.
- Mentor BD/marketing staff; establish clear roles and performance metrics.

90 – Final 90 Days – Execution & Firmwide Integration

Deliver measurable marketing impact and position function as growth partner.

- Launch integrated campaign reinforcing UB Greensfelder's powerhouse identity.
- Roll out cross-practice BD initiatives targeting top-tier sectors.
- Implement CRM dashboards and attorney pipeline reporting.
- Formalize attorney BD coaching program and playbooks.
- Unify firm collateral, templates, and messaging under new brand.
- Deliver first Marketing & BD Performance Dashboard to leadership with KPIs.
- Recommend long-term adjustments based on early data.

Positioning Statement

This plan emphasizes my ability to listen first, align strategy with leadership, and drive measurable outcomes quickly. It showcases how I will:

- Leverage post-merger momentum into brand strength.
- Build attorney engagement in business development.
- Enhance client acquisition and retention programs.
- Develop a high-performing marketing function aligned with UB Greensfelder's growth ambitions.