



**UBGreensfelder®**

# Positioning a Legacy for Future Growth

A Strategic Overview for the Next  
UB Greensfelder CMO

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# Understanding of the UB Greensfelder Opportunity



## A Foundation of Strength

**Heritage & Stability:** A 130-year legacy merged into a modern, full-service Am Law 200 firm.

**Strategic Footprint:** Key offices in growing, economically significant midwestern and national markets (St. Louis, Chicago, Denver, etc.).

**Core Strengths:** Deep bench in Litigation, Corporate, Real Estate, and IP—the engines of the modern business landscape.

## The Growth Imperative

- Increase **market share** in core practices.
- Enhance **brand visibility** and differentiation against larger national firms and smaller boutiques.
- Drive profitable **revenue growth** through strategic client targeting and penetration.

**The CMO's Role:** To be the architect of a modern marketing, business development, and client feedback program that translates this strong foundation into measurable market advantage.

# Challenges & Opportunities

Challenges	Opportunities
<b>Brand Awareness:</b> outside core regions may not match the firm's substantive quality.	<b>Articulate a Clear Value Proposition:</b> Elevate the narrative around "the power of more focus, more attention" vs. larger, less agile competitors.
<b>Competitive Pressure:</b> from both larger national firms and specialized boutiques.	<b>Leverage the "Goldilocks" Advantage:</b> Position UBGreensfelder as the ideal size: large enough for complex matters, agile enough for partner-level service and value.
<b>Maximizing the Merger:</b> fully integrating and promoting the combined firm's expanded capabilities.	<b>Cross-Selling Amplification:</b> Implement a structured program to drive awareness and collaboration between legacy practice groups and offices.
<b>Data-Driven Decision Making:</b> in marketing and BD investment.	<b>Implement ROI-Focused Metrics:</b> Shift from activity-based reporting to a data-driven model measuring contribution to pipeline and revenue.

# Proposed 90-day Plan



## 30 – Discovery & Alignment

- Meet with Managing Partner, COO, Practice Group Leaders, and BD/Marketing staff.
- Conduct listening sessions with attorneys and staff across regions.
- 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.



## 60 – Strategy Design & Early Implementation

- 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.
- Initiate thought leadership platform & optimize website.
- Create PR/media plan to spotlight success and recognitions.
- Mentor BD/marketing staff; establish clear roles and performance metrics.



## 90 – Execution & Firmwide Integration

- Initiate integrated campaign reinforcing UB Greensfelder's powerhouse identity..
- Implement CRM dashboards and attorney pipeline reporting.
- Formalize attorney BD coaching and playbooks.
- Unify firm collateral, templates, and messaging.
- Deliver first Marketing & BD Performance Dashboard to leadership with KPIs.
- Recommend long-term adjustments based on early data.

# Strategic Pillars for Growth: A 3-Year Vision



## BRAND DIFFERENTIATION

- Develop a compelling, research-backed brand message that resonates with target clients in the middle market and beyond.
- Launch a proactive media and content strategy positioning UBGreensfelder attorneys as thought leaders.



## CLIENT-CENTRIC GROWTH

- Institute a formal Client Feedback Program to strengthen relationships and identify growth opportunities.
- Develop a data-driven Key Client Program to maximize retention and cross-selling.



## DIGITAL TRANSFORMATION & ANALYTICS

- Enhance the firm's digital presence to be a primary business development tool.
- Implement a CRM (Client Relationship Management) system to track opportunities and measure ROI.



## PRACTICE GROUP EMPOWERMENT

- Work closely with practice groups to develop tailored go-to-market plans and equip attorneys with effective BD tools and training.



# Why My Experience is a Strategic Fit

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- **Proven Growth Catalyst:** Track record of developing and executing marketing strategies that have directly contributed to revenue growth and market share gain in professional services.
- **Data-Driven Decision Maker:** Expertise in leveraging analytics and CRM systems to allocate resources to the highest-return activities and prove marketing's value to the bottom line.
- **Leader & Collaborator:** Experience building, mentoring, and leading high-performing marketing teams while serving as a trusted advisor to firm leadership and attorneys.
- **Cultural Alignment:** A deep respect for the legacy of firms like UB Greensfelder, combined with the innovative drive to modernize its approach for future success.



I am confident that my strategic approach and operational experience align directly with UB Greensfelder's growth objectives.

I am eager to discuss:

- The firm's most pressing strategic priorities for the next 24 months.
- The leadership team's vision for the role of marketing and business development.
- How we can work together to build a market-leading program.

**Thank you for your time and consideration.**

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## Next Steps

# Thank you

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