

I was approached by a client who had been asked to submit a 90-day plan for her first three months in a new job. Below is the client's original text, followed by my edited version, which I completed within three hours due to the client's very tight deadline. A further challenge was the need to keep the client's own tone of voice whilst correcting errors and improving the flow. Certain details have been redacted for confidentiality.

#### Original Version:

Dear Mr Sxxx,

It was indeed a pleasure meeting with you and I would to thanks you for the precious advise you gave me. As we have agreed, here is a strategic plan that I have elaborate for my 90 first days, inspired from the book you have recommended. I hope you will make it a good reception and I look forward for your comments.

Robert already informed me this week that you will make me a formal offer to join the audit department and I am very honored that you feels that I am the right person for this challenging position. I am confident that I can deliver the results you wants.

Sincerely,

Vxxx Cxxx

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#### Strategy plan for the first 90 days.

As you already keep me aware during our last meeting, my first 90 days in this new position will be critical because:

- small differences in actions will have a huge impact on my long-term results.
- As a new comer, I will be very vulnerable in my new job due to my lack of in-depth knowledge of the challenges I will face and what it will take to succeed.
- Failure to create momentum in the first 90 days virtually will create deadlock and compromise my career at XXX Insurance Group.

My key objectives for this 90 days period will be to:

- get as rapidly and effectively as possible to the break even point, where my contribution to Zxxx Axxx as much value than what I have consumed from it.
- Avoid the commons transition traps as sticking with what I know, setting unrealistic expectations or neglecting horizontal relationship
- creating positive momentum to establish an upward spiral of increasing effectiveness. for example, bolster my personal credibility with good initial decisions founded on the right kind of learning.
- Focusing on the real challenges of my new position and not retreating in my comfort zone.

To achieve those key objective, my strategy plan for the first 90 days will be articulate into four interlaced elements:

- Establish a new mindset
- Understand and Learn
- Align expectation, priority and objectives with stakeholders
- Gain credibility

## 1. Establish a new mindset

It will be essential to discipline myself to make a smooth transition. The first element will be to mentally preparing myself to move into this new role by putting the past behind me and getting a running start by working hard to change to the new perspective. To aims this objective, I will have to:

- Adjust myself to a new organizational contexts with a different political structures and cultures;
- Develop the right relations ship wiring as soon as possible, vertically with bosses and direct reports but also horizontally with peers, key stakeholder and business partners.
- Assess my personal vulnerabilities to the new role and situation and compensate them with both self-discipline and getting advice and counsel inside and outside XXX Insurance.
- Make sure that my strength does becomes weaknesses in my new roles.
- Rework my network to get good political counsel and personal advice to compensate the "new" blind spots and gaps in my expertise or experiences

To help me to establish my new mindset, I already organized some 1 to 1 coaching with a reputed professional and I agreed with Robert to meet for working lunch before my starting date.

## 2. Understand and Learn

My learning plan and agenda will be a critical part of my overall 90 day strategy plan. Unless a disaster is in progress, it will be also a primary focus on my plan for the first 30 days ,covering a right mix of technical, interpersonal, cultural and political learning, with the objectives of:

- Understand the corporate cultures, getting familiar with the informal networks of information and communication
- Adapting as quick as possible to the new company culture from all layers: cultural norms, shared value and languages
- understand the business organization , financial, products, and strategy, including the operating models, planning and performance evaluation systems.

As we cannot figure out where to take a new organization if we do not understand where it has been and how it got where it is, I will put a special effort on understanding of the audit department history, in the past, present and future, for example:

- Past: how the department performed in the past, what was the root cause of its performance, what has been the contribution of the department;

- Present: what is the stated vision and strategy, what are the key processes, what is the performance in terms of quality, reliability and timeliness, what are the land mines, etc.
- Future: what areas is the organization most likely to face stiff challenges in the coming years, what can be done now to prepare them? what new capabilities need to be developed, etc.

Source of information will be from listening from outside and inside the audit department to understand both external realities and internal perceptions and from hard data to soft information.

The learning agenda already started and will have to be reassessed through the 90 days as learning priorities and strategies will inevitably shift as I will dig deeper.

### **3. Align expectation, priority and objectives with stakeholders**

The first step will be to get a clear understanding of the situation that faces the audit department and the implications for what I need to do and how I need to do it. My preliminary assessment is that the department is in an ongoing realignment process (according to the STARS model). The biggest challenge in this situation is to create a sense of urgency, to pierce the veil of denial that is preventing people from confronting the need to reinvent the business. Such realignment is painful but also very interesting moment as the department gets revitalized and people want to excel to be successful.

This will have also a direct implication to my learning agenda discussed above.

The second step will be to build a productive working relationship with Robert, and will include the following elements:

- clarify and align our expectations about the future. Agree on short and medium term goals and on timing and progress measurement
- integrate his goals with my own efforts to get early wins
- regularly clarify and confirm expectation.
- make him aware of the issues I face and give a heads-up as soon as I become aware of a developing problem
- bring not only problem, but plans for how we can begin to address them
- adapt to his style and take 100% responsibilities for making the relationship work

The third step will be to create an operational/tactical plan. The plan will be formalized after a couple of weeks at my new job, when I have begun to connect with the organization and get the lay of the land. It will contain priorities, goals and milestones and fully aligned and cover the same horizon as my 90 days strategic plan. First block of 30 days will focus on learning and building personal credibility. The buy-in of the plan from Robert (and you) will be a must.

And at least but not last, develop a productive relationship with the subordinates as the same way I will have to build it with Robert.

### **4. Gain credibility**

Gaining Credibility will be one of the focus of the first few weeks. This will be achieved by three different elements:

The first one will be to show who I am in terms of capabilities, attitude and values: demanding but able to satisfied, accessible but not too familiar, focused but flexible, active without overwhelming

Secondly, I will identify the highest potential opportunities for short term improvement in organizational performance. Those opportunities must help me build momentum in the short term and lay a foundation for achieving the long term business goal. (for example, gain efficiency on the report issuance process).

Finally, I will work on getting support of people inside and outside the department where I have no direct authority or where the relationship with the audit department as been often difficult. I will need to invest energy in building new networks. recognize enough early that I need to influence in very different ways - trough persuasion and alliance building.

Effective learning as describe above will also help me to build credibility against the perception that i have come in with my mind made up about the department problems.

This strategic plan will definitely accelerate me into my new role and I am thankful to you for you recommended reading of the book of Michael D. Watkins.

Vxxx Cxxx

### **Edited Version:**

Dear Mr. Sxxx,

It was a pleasure to meet you, and I am grateful for the useful advice you gave me. As agreed, I have put together a strategic plan for the first 90 days in my new position, based on the guidelines laid out in the book you recommended. I look forward to receiving your comments and further suggestions.

Robert advised me that you plan to make me a formal offer to join the audit department. I am delighted that you feel I am the right person for this challenging position, and I am confident that I can deliver the results you want.

Yours sincerely,

Vxxx Cxxx

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### **Strategic Plan for the First 90 Days.**

As we discussed during our last meeting, my first 90 days in this new position will be critical because:

- There will be many new challenges which will constitute a steep learning curve
- Even the small decisions I take in the short term may have a huge impact on my long-term results
- Hitting the ground running and creating positive momentum in the first three months will help ensure success in my longer term career at XXX Insurance Group

My key objectives for this 90 days period will be to:

- Work as quickly as possible towards the point where I can make a valuable contribution to XXX Insurance
- Avoid the common transition traps such as sticking with what I know, setting unrealistic expectations or neglecting to build strong relationships with peers
- Bolster my personal credibility with good initial decisions and early wins founded on detailed research and learning
- Focus on the challenges and opportunities for my department

To achieve these key objectives, my strategy plan for the first 90 days will comprise four interconnected elements:

- Establish a new mindset
- Understand and learn
- Align expectations, priorities and objectives with stakeholders
- Gain credibility

## **5. Establish a New Mindset**

I need to take a proactive approach to achieve a smooth transition and make a positive impact in my new role by focusing on the new environment, the challenges and the opportunities of the position. My strategy will be to:

- Understand and adjust to new organizational contexts with different political structures and cultures
- Identify and develop key relationships: vertically with my managers and direct reports, but also horizontally with peers, key stakeholders and business partners.
- Assess my personal strengths and weaknesses in the context of the role, and take steps to address them via personal resources and assistance from both within and outside XXX Insurance.
- Seek advice from colleagues and others in my professional network to address any gaps in my expertise and experience.

To help me to achieve these goals, I have already organized some 1 to 1 coaching with a reputable professional, and I have agreed with Robert to meet for a working lunch before my start date.

## **6. Understand and Learn**

My learning goals will be a critical part of my overall 90 day strategy plan. Assuming that there is not some other, more immediate, business need, they will be my primary focus during the first 30 days. The plan covers technical, interpersonal, cultural and political learning, with the objectives of:

- Understanding the corporate culture, getting familiar with the informal networks of information and communication
- Adapting as quickly as possible to the new company culture from all perspectives: cultural norms, shared value and languages
- Understanding the business organization in terms of finance, products and strategy. This will include learning about operating models, planning and performance evaluation systems.

Understanding the history and development of the department is key to shaping its future. I will focus on the following:

- Past: how the department has performed in the past, the reasons for successes and failures and how it has contributed to the organization as a whole.
- Present: what is the stated vision and strategy, what are the key processes, what is the performance in term of quality, reliability and timeliness, what are the 'land mines', etc.
- Future: what are the anticipated challenges in the coming years, what can be done now to prepare for them, what new capabilities need to be developed, etc.

I will source information as widely as possible to examine external realities and internal perceptions, using both hard and soft data. My learning is already underway and I expect to re-assess the plan over the 90 days as I dig deeper and priorities inevitably shift.

## **7. Align Expectations, Priorities and Objectives with Stakeholders**

The first step will be to get a clear understanding of the immediate and longer term issues facing the audit department. My preliminary assessment is that the department is in an ongoing realignment process (according to the STARS model). The biggest challenge in this situation is to create a sense of urgency, to pierce the veil of denial that is preventing people from confronting the need to reinvent the business. Such realignment is painful but ultimately very positive as the department is revitalized and individuals gain a clearer sense of purpose and achievement.

This will have also a direct impact on my learning agenda outlined above.

The second step will be to build a productive working relationship with Robert, which will include the following elements:

- Clarify and align our expectations about the future. Agree on short and medium term goals and on timing and progress measurement
- Integrate his goals with my own efforts to get early wins
- Regularly clarify and reconfirm expectations.

- Make him aware of the issues I face and give a heads-up as soon as I become aware of a developing problem
- Identify not only the problem, but also suggestions for a solution
- Adapt to his style and take 100% responsibility for making the relationship work

The third step will be to create an operational/tactical plan. The plan will be formalized after a couple of weeks in my new job, when I have begun to connect with the organization and understand the lie of the land. It will contain priorities, goals and milestones and will be fully aligned with my 90 day strategic plan. During the first 30 days I will focus on learning and building personal credibility. It is essential that my plan has full buy-in from both you and Robert.

And at last but not least, I will develop a productive relationship with colleagues and direct reports in the same way as I will with Robert.

## **8. Gain Credibility**

Gaining credibility will be a primary focus of the first few weeks. This will be achieved by three different elements:

The first one will be to show who I am in terms of capabilities, attitude and values: demanding but fair, accessible but not too familiar, focused but flexible, active but not overwhelming

Secondly, I will identify the highest potential opportunities for short term improvement in organizational performance, such as improved efficiency on report issuance. These opportunities will help me build momentum in the short term and lay a foundation for achieving long term business goals.

Finally, I will work on getting the support of people inside and outside the department where I have no direct authority, or where the relationship with the audit department has been problematic in the past. I will need to invest energy in building new networks and work to influence through persuasion and alliance building. I am particularly aware of the need to overcome the perception that I have come in with my mind already made up about the department problems.

Creating this plan has allowed me to see a clear pathway to success in this new role. I am grateful to you for the recommendation of Michael Watkins book, and look forward to joining the team at XXX Insurance.

Yours sincerely

Vxxx Cxxx