Develop your 90 day Leadership Plan

A guide for *accelerating* *your transition* into a new leadership role or *revitalising* your leadership



# Purpose of this guide

The purpose of this guide is to help you ***build your own leadership plan***. This is not a project plan of the work of your area - it is your own action plan. The actions you personally will take to ensure success in your new role, with your new team or for those of you who are in more established roles and teams, the actions you will take to ‘revitalize’ your leadership

This guide has been written to help you ***accelerate*** *your transition* into your new organisation and new role or to help you ***revitalise*** your leadership with your existing team or new team members.

## How to use this guide

This guide may cover areas you are already aware of or have worked on. Use the guide wisely and pick and choose those frameworks and tools that are going to *work in your context*. Use it to plan your conversations and build your own leadership plan.

**“The First 90 Days”**

Some of the tools you will find in this guide draw on the work of Michael Watkins from his book “The First 90 Days”, Harvard Business School Press (2003). In his book, Michael Watkins describes how the actions taken by leaders in new roles in their first three months are critical to their achieving their full potential in the role. He calls this ‘*transition acceleration’* where the more efficiently a new leader transitions into their new role, the quicker they can contribute and add value in that role.

Those of you who are continuing in your roles will find this approach works very well for developing your leadership plan *to ‘revitalise’* your leadership.

## Our approach

Our approach is based on The Kolb cycle of learning, in which our***actions*** provide the basis for ***reflection***. When we reflect we consider our actions and hopefully learn through them by gaining *insights. These insights* formthe basis of our ***action plans*** which when acted on, in turn, create new ***experiences***. The cycle then begins again.

In our guide ***we start with reflection*** on what has gone before, whether we have been part of it or not. The tools listed in each section, are contained in this guide and designed to help you develop your 90 day leadership plan.

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| **Act** | | |
| **Prepare for conversations with your leader** | | |
| The conversations you have with your leader lay the groundwork for productive working relationships that are essential for your successful leadership | [**Prepare for conversations with your leader**](#_Prepare_for_conversations) |  |
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# Reflection tool [Back](#Leadership_transitions_checklist)

## Reflection is often associated with “looking back” and considering the past so we can learn from setbacks and strive to do better. It can also be an important part of thinking about action.

## This tool will provide you with a structure to make sense of insights you gain as you talk to others and use additional tools provided.

## Don't overlook valuable insights

Prior to taking up your new role and during the early days of your transition, you will have many meetings and interviews with various members of your team, with your peers, and with your new leader. Use the [**Understand your objectives**](#_Understand_your_objectives_6)to list the questions you can use to gain the necessary insights. If you are ‘revitalising’ your leadership, consider initiating similar conversations.

The other tools that can provide you with valuable insights are:

* **[Understand your Business](#_Understand_your_Business)**
* [**Review your Business Plan**](#_Review_your_Business_2)
* [**Derailing behaviours checklist**](#_Derailing_behaviours_checklist_1)
* Your Values Based Leadership profile

### Evaluate what you are learning as you go

Ensure that you don't overlook the significance of valuable insights.

**Step 1** Assess the significance of what you learn as close as possible to the discussion or meeting where you gained the insight.

**Step 2** Systematically record the insights you gain and your assessments of them, using the Reflection Tool.

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| Tips You will have many meetings and many discussions in the course of seeking insights about yourself and your new role.  Keep adding to the record you are keeping, analysing that assessing as you go. Treat your transition reflections as a continuing narrative   * of what you are learning * what is significant, and * what requires follow-up   **Don't forget!**  The ***Reflection*** tool can be used at any time, to record and assess insights gathered in meetings and projects. |

## Reflect on what you learn and consider how to apply the insights you gain [Back](#Leadership_transitions_checklist)

**Stepping Up – Understanding Yourself**

Build your insights over time. Add something to your Reflections after each discussion or meeting.

| **Source of insight** | **What I learned** | **How these insights are relevant to me?** | **What should I consider further? What actions should I take? Add to plan.** |
| --- | --- | --- | --- |
| Yourself |  |  |  |
| Your New Leader |  |  |  |
| Your Direct Reports |  |  |  |
| Peers |  |  |  |
| Stakeholders |  |  |  |

# Understand your objectives [Back](#Leadership_transitions_checklist)

As part of your new role, you will set objectives that drive the actions of you and your team. As you plan the actions that are needed to deliver required outcomes, take time to research the context for each objective

You will be in a better position to make the judgments your new role requires, if you understand

* how outcomes were delivered in the past
* what in the near-term could impact your outcomes
* what in the longer-term could impact your outcomes

If you are ‘revitalising’ your leadership, consider using this tool as a basis for considering your progress to date and identifying opportunities to include in your 90 day leadership plan. You might decide to use the tool to develop questions as prompts for working through yourself or consider who else you might include in discussions to get a broader view.

## Step 1: Develop a structured plan for gaining the insights you need

Use this tool

* to prepare short list of questions that target the information you seek
* to identify the most likely sources or experiences that will deliver the target information

## Step 2: Discuss, explore, analyse, review

Follow up your planning with meaningful conversations and practical investigation.

## Step 3: Transfer insights to your reflection tool

During your conversations, you will gain insights that you know you should keep in mind. Use your [**Reflection tool**](#_Reflection_tool_) to capture the insights so that you can include them in your 90 day Leadership Plan and benefit long-term from their value.

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| Tips for conversations and interviews  1. ***Ask open-ended questions*** that require a descriptive or narrative answer - not simply a ***yes*** or ***no***. For example, “*What are your expectations of my availability to you and my current team as I transition to my new role?”* 2. ***Be systematic***. Prepare and use the same script and questions in one-on-one meetings with people of the same level, such as direct reports and peers. Then you can compare answers more easily and avoid being over-influenced by those you speak to first. 3. As you gather insights, ***start formulating hypotheses that you can test in further conversations***. Michael Watkins recommends a "cyclical learning process in which you collect information, analyse and distil it, develop hypotheses, and test them.[[1]](#footnote-1) 4. ***Make sure that the questions you ask don't imply your own values***, preferences or pre-judgments. For example, “*You had the resources you needed. Why couldn't the team complete the project successfully?* “ 5. ***Take care not to*** get so interested in what you are discussing that you fire off questions too fast and ***turn the interview into an inquisition***. |

# Develop your question sets, identify the sources of insights and determine a strategy for gaining the insights you need

| **Objective** | **Context[s] that will influence delivery of outcomes** | **3 questions to ask** | **Likely source of insights** | **Capture strategy#** |
| --- | --- | --- | --- | --- |
|  | What has been done in the past  What is likely to impact outcomes in the near-term  What is likely to impact outcomes in the longer-term |  |  |  |
|  | What has been done in the past  What is likely to impact outcomes in the near-term  What is likely to impact outcomes in the longer-term |  |  |  |
|  | What has been done in the past  What is likely to impact outcomes in the near-term  What is likely to impact outcomes in the longer-term |  |  |  |
|  | What has been done in the past  What is likely to impact outcomes in the near-term  What is likely to impact outcomes in the longer-term |  |  |  |

**# Structured one-on-one interviews** with direct reports and peers [same set of questions]; **formal and informal meetings** with previous leader, new leader or other key contacts; **group meetings** with direct reports, front-line team members or from core business functions; **analysing past decisions**; **analysing processes**, **front-line tours**, **reviews of pilot projects**.

# Understand your Business [Back](#Leadership_transitions_checklist)

As a leader in a new role it is important that you grasp a deep understanding of the context your business is operating in as soon as possible. Advance your knowledge in the company’s history, products/service, market dynamics, systems, structures, culture and unwritten rules. The points outlined below are to help you discuss the business context with your peers and leaders as well as conduct additional research.

If you ‘revitalising’ your leadership, use this checklist to consider whether there are areas you would like to revisit.

Use your [**Reflection tool**](#_Reflection_tool_) to capture any insights that you gain as you work through your checklist and have discussions.

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| **Discuss these points with your leader, peers, direct reports and conduct additional research to further and deepen your understanding** |
| What are the market dynamics within which you operate?  What is the Competitive environment –   * Competitors? * Cost structures? * Regulations?   What is the Industrial environment and associated challenges?  What are the Strengths, Weaknesses, Opportunities and Threats to the business?  What are the unwritten rules of the business?  Describe how your area contributes to the overall strategy?  Describe the value chain and how value is created and measured?  What are the critical success factors for the business?  What are the future business challenges and pressure points? |

Review your Business Plan [Back](#Leadership_transitions_checklist)

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| **Assess your business plan against these questions** |
| How does it determine your main priorities   * next quarter? * to year end? * long term?   How does it inform you on your Individual or Shared Objectives?  What are the main priorities for your team?  What is the current state of the budget?  What are the budgetary challenges in order to meet the business plan?  What project reviews need to be undertaken (if any)?  What are the reporting expectations against plan and budget? |

# Understand yourself

# Derailing behaviours checklist [Back](#Leadership_transitions_checklist)

## Be alert to potential disruptive behaviours

"Your weaknesses can make you vulnerable, but so can your strengths. Every strength has its attendant pitfalls. The qualities that have made you successful so far can prove to be weaknesses in your new role."[[2]](#footnote-2)

Don't risk alienating colleagues and subordinates, or undermining the commitment and effectiveness of your team.

Make sure you are aware of behaviours - whether strengths, weaknesses or leadership style - that could derail your leadership transition.

## A step-by-step assessment

**Step 1** Use this checklist to do a self-assessment of how you think you work with your key contacts - leaders, peers and direct reports.

**Step 2** If you are in doubt about a particular behaviour, talk to key contacts to clarify your assessment.

**Step 3** If you identify a personal behaviour that could put your transition at risk, note it in your [**Reflection tool**](#_Reflection_tool_) and makesure to note actions you can take to avoid this type of behaviour***.***

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| Tips When you are working through the derailing behaviours checklist, think about comments you have heard about yourself and about other leaders.   * About yourself - use them as input to your self-assessment * About other leaders - compare yourself to the leaders who have been discussed. Ask yourself whether you behave in a similar way and whether the same comment could be made about you. |

## Be alert to potential disruptive or derailing behaviour.

### Do a self-assessment of how you think you work with your key contacts

| **Potentially derailing behaviour** | **What you know of your own behaviours or what have heard key contacts say** | **To > Reflection Tool** |
| --- | --- | --- |
| **Focuses too heavily on details** |  |  |
| **Reacts negatively to criticism** |  |  |
| **Is insensitive to others, who often feel intimidated** |  |  |
| **Jumps to hasty conclusions** |  |  |
| **Micromanages direct reports** |  |  |
| **Easily swayed by others' opinions** |  |  |
| **Manipulates others** |  |  |
| **Quickly dismisses the ideas of others** |  |  |
| **Does not share relevant information** |  |  |
| **Does not take responsibility** |  |  |
| **Does not recognise others' contributions** |  |  |
| **Seeks gain at others' expense** |  |  |
| **Values do not align with the organisation's** |  |  |
| **Does not delegate well, likes to do it all alone** |  |  |
| **Seen to be easily irritated, especially by those who seem to be less able or who work at a different pace** |  |  |
| **Has trouble adapting to those with a different style** |  |  |
| **Is volatile under pressure, stress** |  |  |
| **Shows defensiveness** |  |  |
| **Does not value diversity and cross-cultural differences; fails to promote a sense of inclusion for all team members/colleagues** |  |  |
| **Fails to build a team** |  |  |
| **Is non-strategic** |  |  |

# Understand your team

# SWOT analysis on team and individuals [Back](#Leadership_transitions_checklist)

## Evaluate your team

Rarely do we get the opportunity to build a team from scratch, the majority of times we inherit a team. Your role as a leader is to lead, mentor, coach and guide your team.

It is important for your success and the success of each the individual team members that you have the right people in the right roles. So it is vital that you have clarity around structure, system, direct and skills before you start to mould your team.

A SWOT analysis identifies the strengths, weaknesses, opportunities and threats of a given situation such as a group or company. By identifying the strengths, weakness, opportunities and threats to your team or operation you are able to plan and put into action appropriate measures to deal with all four areas of the SWOT.

Use the following SWOT analysis to do a complete review on your team, which will assist you in assessing each individual in your team.

## SWOT analysis on team and individuals

**Step 1** *Do a* ***SWOT analysis*** *of your team and individual team members*

**Step 2 *Identify insights*** *that require further consideration*

**Step 3 *Transfer actions*** to your[**90 day plan**](#_Build_your_90-day)

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| Tips **Avoid common traps in building productive and effective teams[[3]](#footnote-3)**   * Don't risk leaving the existing team in place unchanged for too long. Make one of your goals to set a deadline for deciding the composition of your team. * Develop a plan for addressing obvious team problems quickly. Even if you cannot 'fix' the problem immediately, develop remedial options as quickly as you can - even interim options such as recruiting temporary resources. * Develop your team strategy in line with what you are learning about the strategy, structure and systems of the organisation. * Don't let uncertainty cost you good people. As you assess the directions of your changes, ensure that your top performers are aware of how you value them. * Don't initiate team-building before your core people are in place. * Wherever possible, only make implementation decisions if the people required to carry through the implementation are in place. * Don't stand alone when you tackle team-building and team-restructuring. Seek allies and in particular, seek the support of your HR partner. |

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## Leader/Title\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_ / \_\_\_\_ / \_\_\_\_\_\_

## Step 1: Do a SWOT analysis of your team and individual team members [Back](#Leadership_transitions_checklist)

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| --- | --- |
| **Strengths** | **Weaknesses** |
| What advantages does your team have? What do you do better than anyone else? What do people outside your team see as your strengths? What personal strengths have individuals demonstrated - Competence? Energy? Focus? Trust? Judgment? | What could you improve? What should you avoid? What do people outside your team see as weaknesses? What factors are eroding success? |
| **Team strengths** | **Team weaknesses** |
| **Individual team member strengths** | **Individual team member weaknesses** |
| **Opportunities** | **Threats** |
| Are there opportunities to develop new processes or improve the way the team works? Are there interesting trends, within or outside the organisation, which the team could leverage? For example, changes in technology or in company direction? | What obstacles does the team face? Is the team concerned about changes to individual roles? Changing technologies? Is demand for the team products or services decreasing? Are there factors that are destabilising the team? |
| **Opportunities from within the team** | **Threats over which the team has control** |
| **Opportunities from outside the team** | **Threats over which the team has no control** |

## Step 2: Identify insights that require further consideration [Back](#Leadership_transitions_checklist)

**Review and build your team**

Remember you are trying to identify positive attitudes and behaviour that can result in improved team cohesion and effectiveness.

| **What insights did you uncover about your team** | **Requires a response from you?** | **What can you do to build on a strength, seize an opportunity, mitigate a weakness or counter a threat. Add actions to your** [**90 day plan**](#_Build_your_90-day) |
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# Identify quick wins [Back](#Leadership_transitions_checklist)

Before jumping into how to achieve this win, it’s important to make one point clear, your win should be a team win, not just your win. You need to consciously involve your team in your early achievements.  This will prepare you for success as leaders are ultimately most successful when they accomplish work through others, and it will also build confidence across your team.

In pursuit of this quick team win, you should do three things.  First, decide where you want to focus your efforts.  There will be probably be many possible projects for you to pursue, so you need to make sure that you choose one that is achievable, measurable, and to the greatest extent possible, aligned with key team or organizational priorities.

## Identifying opportunities for " Quick Wins" - step-by-step planning

**Step 1 *Analyse potential quick wins*** and find two or three quick wins that deliver the outcomes you need and that can be accomplished within the first 90 days in your new role.

**Step 2 *Validate and plan the detail of the three quick wins that you will pursue*** - specific actions that deliver concrete, achievable results.

**Step 3 *Transfer quick win actions to your*** [**90 day plan**](#_Build_your_90-day)

Important attributes of your quick wins

All your quick wins should have these 5 key attributes.

* A clear, readily understood objective
* Results that will build your credibility with key stakeholders such as your team and your leader
* A win for your TEAM as well as for your leadership - ***collective*** quick wins
* Buy-in from other key stakeholders
* Effective measures of success that are understood and recognised by key stakeholders

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| Common traps to avoid[[4]](#footnote-4)  1. ***Taking on too much and losing focus*** It is essential to identify and validate potential opportunities and then focus your energies on turning them into wins. 2. ***Choosing quick win projects that fail to build momentum*** The quick win projects you choose must give your leadership momentum. They must deliver outcomes for your team and other key stakeholders. 3. ***Targeting outcomes that are not valued by the organisation's culture*** All organisations are different and value different types of outcomes. Be sure your quick win project is seen as a ***win*** by your team and direct leader. 4. ***Targeting outcomes that are not valued by your direct leader*** Your quick win objectives will define outcomes that matter to your team and your organisation but the outcomes should also earn the good opinion of your leader. 5. ***Achieving results at the expense of an acceptable way of 'doing business'*** You will be judged as much by the ***way*** you achieve results as by the results themselves. The process you use to achieve results should be respected by your peers, your team and your leader and align to the behaviours. |

## Step 1: Analyse potential quick wins [Back](#Leadership_transitions_checklist)

***Brainstorm*** a list of potential quick wins, then ***do an initial analysis to test their potential*** for inclusion in your [**90 day plan**](#_Build_your_90-day).

| **Quick win** | **Objective** | **Significance** | **Credibility** | **Team capability and capacity** | | | **Your assessment** |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Write a short name for referring to the quick win project. | Write a clear objective for the quick win. Remember! Your team must see the project as a **TEAM quick win** | Must be either ***urgent*** or ***important***! | Identify key stakeholders with whom this quick win MUST build credibility. | Does your team have the skills & experience required? [Y/N] | Can your team achieve this win within your first 90 days? [Y/N] | Quick win has potential? [Y/N] | |
|  |  |  | Leader  Team  Others [Specify] |  |  |  | |
|  |  |  | Leader  Team  Others [Specify] |  |  |  | |
|  |  |  | Leader  Team  Others [Specify] |  |  |  | |
|  |  |  | Leader  Team  Others [Specify] |  |  |  | |
|  |  |  | Leader  Team  Others [Specify] |  |  |  | |

| **Which quick win?** | **Can we ACHIEVE this quick win?** | | **Can we DELIVER concrete results?** | | | |
| --- | --- | --- | --- | --- | --- | --- |
|  | **Team contribution** | **Stakeholder buy-in** | **Metrics to measure success** | **Draft action line >>** [**90 day plan**](#_Build_your_90-day) | |
| **Quick win project + objective** | **Break the quick win into manageable parts - realistic team actions.** | **List how to gain support of key contacts.** | **Define objective measures OR useful subjective/anecdotal measures.** | **Major & interim milestones [actions] to track progress.** | **Date for plan** |
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# Signal your management routine [Back](#Leadership_transitions_checklist)

## Establish Key meetings

Initially you will need to meet with your new leader and direct reports. In doing so signal that you want to establish regular meetings and then go about establishing those meetings. Define what each meeting is for and your expectations for that meeting.

## Direct Reports

Regular Operational team meetings are just that, all about reviewing the operations of the business. These meetings need to be at least fortnightly, but no less than monthly. These meetings are all about working ‘in’ the business.

Your team also needs to have regular strategy meetings where they take a helicopter view of the business and realign where needed. These are usually full day meetings with the focus on working ‘on’ the business.

Set up both your Operational and Strategic team meetings early for the next 12 months. Ensure the dates are in yours and your Direct Reports’ diaries and ensure everyone knows that these dates do not move. Make the purpose of these meetings crystal clear to everyone.

## Your Leader

Signal that you wish to meet regularly to review the business as well as (at least) quarterly performance review meetings. Ask to have these meetings set up early and lock them in over the long term.

## Your Peers

Meet with your Peers and understand how they operate their businesses. There may be key forums that they hold that either yourself or one of your Direct Reports should attend. Look for forums where you can keep your Peers and their Direct Reports up to date on any changes you may be making that may affect them. Look for opportunities to meet with your Peers both formally and informally.

## Make it part of your 90 day plan

Ensure you add meetings to your calendar and [**90 day plan**](#_Build_your_90-day)

# Understand stakeholders [Back](#Leadership_transitions_checklist)

## Your success will depend to a certain extent on people outside your direct reporting line, which makes it imperative that you create and manage coalitions - that you manage stakeholders and collaborate with them. This means determining whom you must influence, who are likely to support and resist your key initiatives and how to persuade the ‘swinging voters’.

**Understand stakeholders - step-by-step planning**

**Step 1- Identify key stakeholders and rate their support and influence**

1. ***How you identify key stakeholders*** is important**.**

* Firstly, identify key interfaces between your unit/business and other areas of the Group and identify key people in each.
* Ask your leader to provide you with a list of the 10 people outside of your business that they feel you should get to know.
* Who are your key customers and suppliers and what influence do they have over your business?
* Identify who are the key opinion influencers in your business. These people may not have authority within the structure or the hierarchy, but may be considered key opinion leaders, so they have the influence to support or resist your initiatives and to influence others to do likewise.

1. Rate their influence and their support

**Step 2 *Map to your Stakeholder Management Matrix***Map these people to the framework below based on how you rated their influence and support

**Step 3 *Identify actions that will help build their support***  
Identify actions on how you can approach stakeholders with high influence and build support and add to your [**90 day plan**](#_Build_your_90-day)

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| Tips  * You can use the Stakeholder Management matrix in a general sense or for specific initiatives. It has been designed to help you identify whether a stakeholder’s support and influence is strong or weak so that you can determine how you approach and build coalitions with your most influential stakeholders to ensure you have and maintain their support. |

# Step 1- Identify key stakeholders and rate their support and influence

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| --- | --- | --- | --- |
| **Name** | **Title** | **Support**  **H/M/L** | **Influence**  **H,M,L** |
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## **Step 2. Map to your Stakeholder Management Matrix** [Back](#Leadership_transitions_checklist)

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| --- | --- | --- |
| **High**  **S**  **u**  **p**  **p**  **o**  **r**  **t** | **High Support/Low Influence** | **High Support/High Influence** |
| **Low** |  |  |
|  | **Low Support/Low influence** | **Low Support/High influence** |
|  | **Low**  **Influence** | **High** |

# Step 3 - Identify actions for building support

Identify actions on how you can approach stakeholders high on influence and build support and add to your [**90 day plan**](#_Build_your_90-day)

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| **Name** | **Actions to build support** |
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# 90 Day Leadership Plan [Back](#Leadership_transitions_checklist)

# Build your 90-day plan

You are not going to impact the overall business unit performance in your first 30 days. Focus your first 30 days on building credibility with your Leader, Direct Reports and Peers, as well as putting in place key actions for the second 30 day period.

Use the next 30 days to demonstrate consistency and leadership by establishing expectations, reporting structures and meeting schedules. Be accessible but not too familiar, decisive but judicious, focused but flexible.

Let your people know that you will press them to make realistic commitments and that you will hold them to those commitments, but also demonstrate that you can be satisfied and rewarding of work well done.

### Your first 30 days - Reflection

"...learning should be a primary focus of your plan for your first 30 days on the job."[[5]](#footnote-5)

* Conduct a systematic program of learning about yourself, your new role and the business - through conversations, interviews and meetings.
* Reflect on what you have learned and identify critical or strategic actions that need to be included in your plan.

### Your next 30 days - Planning

* Focus on building your team and seeking alignment across your department/business.
* Signal early change by identifying opportunities for quick wins.[[6]](#footnote-6) (See the “[**Identify quick wins**](#_Identify_quick_wins) tool) and take time to negotiate success with your leader.
* Identify and reach out to key influencers and stakeholders and create collaborative coalitions.
* Finalise your plan for your 90-day plan and communicate your plan with your leader and your team.

### Your final 30 days - Action

* Act to ensure success for your plan.

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| Tips  1. ***Be open to suggestions and feedback***.   This will help you develop a more comprehensive set of actions as well as build effective communication channels.  As an added bonus, openness also demonstrates your approachability and fosters the building of healthy work relationships.   1. ***Use trusted advisors to test your actionable leadership priorities.*** 2. ***Remember the 80/20 rule. Do not put in unneeded effort.***   There is a place for perfectionism, but for most activities, there comes a stage when there is not much to be gained from putting extra effort into it. Save perfectionism for the tasks that need it.   1. ***Finally, always follow-up, measure, and check to see if the actions are doing what is required.***   You need to self-check – "do you consistently follow through on your most important action?" |

## Develop your action plan for the first 30 days of your leadership plan [Back](#Leadership_transitions_checklist)

**Planning your first 30-60-90 Days**

Track status - **N** for Not started ~ **P** for Partially completed ~ **Y** for Completed

| **Focus of your actions** | **Action** | **Desired Outcome** | **Comments & Notes** | **Target Date** | **Date completed** | **Status** |
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| **Your Team** |  |  |  |  |  |  |
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| **Quick Wins** |  |  |  |  |  |  |
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| **Your leader** |  |  |  |  |  |  |
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## Develop your action plan for the first 60 days of your leadership plan [Back](#Leadership_transitions_checklist)

Planning your first 30-60-90 Days

Track status - **N** for Not started ~ **P** for Partially completed ~ **Y** for Completed

| **Focus of your actions** | **Action** | **Desired Outcome** | **Comments & Notes** | **Target Date** | **Date completed** | **Status** |
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| **Your Team** |  |  |  |  |  |  |
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| **Quick Wins** |  |  |  |  |  |  |
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| **Your leader** |  |  |  |  |  |  |
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## Develop your action plan for the first 90 days of your leadership plan [Back](#Leadership_transitions_checklist)

Planning your first 30-60-90 Days

Track status - **N** for Not started ~ **P** for Partially completed ~ **Y** for Completed

| **Focus of your actions** | **Action** | **Desired Outcome** | **Comments & Notes** | **Target Date** | **Date completed** | **Status** |
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| **Yourself** |  |  |  |  |  |  |
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| **Your Team** |  |  |  |  |  |  |
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| **Quick Wins** |  |  |  |  |  |  |
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| **Your leader** |  |  |  |  |  |  |
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# Prepare for conversations with your leader [Back](#Leadership_transitions_checklist)

## Negotiate success

The conversations you have with your new leader lay the groundwork for productive working relationships that are essential to your successful leadership transition.

If you are ‘*revitalising’* your leadership and your leadership plan, set up a meeting with your leader, explain your approach and use the tools and prompts that best suit your situation.

## Step-by-step to well-prepared conversations

Use this tool to collate and organise your learnings, and to plan ways to share them with your leader.

**Step 1** Read through the notes you took using the tool that is listed for each conversation topic.

**Step 2** Develop discussion points that will enable you to share your insights in your conversations and to engage your new leader in your leadership plan

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| Take special care! **In working through this tool, you could record information that is sensitive. *Treat all completed documents with care!*** |

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| Tips Your new leader will want to know   * what you have learned about your role and the leadership that is required * what actions you believe are required to take the team and project forward * how they will work with you - how each party will adapt to the other * how you see yourself and how you plan to develop your leadership |

## Collate what you have learned from others about your leadership role and your team

| **Conversation topic** | **Discussion points to include in conversations with your leader** |
| --- | --- |
| **Tool used to gather insights**  [***Reflection tool***](#_Reflection_tool_)  **Topic scope**  What others are saying   * about the past, current and future requirements of the role * about your team * about future opportunities |  |
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## Collate your expectations of what needs to be done and the actions that you want your leader to support

| **Conversation topic** | **Discussion points to include in conversations with your leader** |
| --- | --- |
| **Tools used to gather insights**   * [***Identify quick wins***](#_Identify_quick_wins) * [***90 day plan***](#_Build_your_90-day) * [***SWOT analysis on team and individuals***](#_SWOT_analysis_on_1)   **Topic scope**  What you believe is required as you continue.   * The quick wins you have planned * The key milestones you have set out in your 90-day plan |  |
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## Collate your learnings about your leadership style. plan ways to agree how you and your leader will work together

| **Conversation topic** | **Discussion points to include in conversations with your leader** |
| --- | --- |
| **Tools used to gather insights**  [***Reflection tool***](#_Reflection_tool_)  **Topic scope**  The insights that enable you and your leader to confirm how you will work together   * Past and current relationships with your leaders * How you believe you can contribute to a productive relationship |  |
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## Collate your learnings about the personal development required by your role

| **Conversation topic** | **Discussion points to include in conversations with your leader** |
| --- | --- |
| **Tools used to gather insights**  [***Reflection tool***](#_Reflection_tool_)  [***Derailing behaviours checklist***](#_Derailing_behaviours_checklist_1)  ***Values based leadership profile***  **Topic scope**   * Your past performances and how they match the requirements of your new role * How you need to grow in terms of leadership behaviours * How you need to grow in terms of leadership style |  |
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# Prepare for conversations with your direct reports [Back](#Leadership_transitions_checklist)

## Negotiate success

The conversations you have with your direct reports lay the groundwork for productive working relationships that are essential to your successful leadership transition.

If you are ‘*revitalising’* your leadership and your leadership plan, set up a meeting with your direct reports, explain your approach and use the tool and prompts that best suit your situation.

In preparing for conversations with your direct reports, you will be planning conversations about what you have learned and what you have planned for the early stage of your transition.

## Step-by-step to well-prepared conversations

Use this tool to collate and organise your learnings, and to plan ways to share them with your direct reports.

**Step 1** Read through the notes you took using the tool that is listed for each conversation topic.

**Step 2** Develop discussion points that will enable you to share your insights in your conversations and to engage your direct reports in your transition plan.

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| Take special care! **In working through this tool, you could record information that is sensitive. *Treat all completed documents with care!*** |

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| Tips Your direct reports will want to know   * what you have learned about your role and the leadership that is required * what actions you believe are required to take the team and project forward * how they will work with you - how each party will adapt to the other |

## Collate what you have learned from others about your new role and your new team

| **Conversation topic** | **Discussion points to include in conversations with your direct reports** |
| --- | --- |
| **Tool used to gather insights**  [***Reflection tool***](#_Reflection_tool_)  **Topic scope**  What others are saying   * about the past, current and future requirements of the role * about your team * about future opportunities |  |
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## Collate your expectations of what needs to be done and the actions that you want your direct reports to support

| **Conversation topic** | **Discussion points to include in conversations with your direct reports** |
| --- | --- |
| **insights**   * [***Identify quick wins***](#_Identify_quick_wins) * [***90 day plan***](#_Build_your_90-day) * [***SWOT analysis on team and individuals***](#_SWOT_analysis_on_1)   **Topic scope**  What you believe is required as you continue.   * The quick wins you have planned * The key milestones you have set out in your 30-60-90-day plan |  |
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## Collate your learnings about your leadership style, and plan ways to agree how you and your direct reports will work together

| **Conversation topic** | **Discussion points to include in conversations with your direct reports** |
| --- | --- |
| **Tools used to gather insights**  [***Reflection tool***](#_Reflection_tool_)  **Topic scope**  The insights that enable you and your direct reports to confirm how you will work together   * Past and current relationships with teams * How you believe you can contribute to a productive relationship |  |
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1. Michael Watkins, The First 90 Days”, Harvard Business School Press (2003). p.49 [↑](#footnote-ref-1)
2. Michael Watkins, The First 90 Days”, Harvard Business School Press (2003). p.27 [↑](#footnote-ref-2)
3. Derived from pp 159-162. Michael Watkins, *The First 90 Days: Critical Success Strategies for New Leaders at All Levels*. Harvard Business School Press, 2003. [↑](#footnote-ref-3)
4. The notes on common traps to avoid are based on *Avoiding Common Traps*, pp81-90, The First 90 Days: Critical Success Strategies for New Leaders at All Levels, Michael Watkins. Harvard Business School Press, 2003. [↑](#footnote-ref-4)
5. Ibid. p.49. [↑](#footnote-ref-5)
6. "As you look for ways to create momentum, keep in mind that the actions you take to get early wins should do double duty. Plan you early wins so that they help you build credibility in the short run ***and*** lay a foundation for your long-term goals." Ibid. p. 85. [↑](#footnote-ref-6)