My 90 day Leadership Plan

*For first time leaders*

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



While every leadership transition is different, there are 3 main reasons that leaders in new roles struggle in their transition.

* **Delivering results in an unfamiliar environment**

The reality is that new leaders need to deliver results when they have not yet mastered their position

* **Building effective working relationships**

Leaders cannot deliver on their own. Leaders in new roles need to quickly build working relationships with their leader, peers, team members and key stakeholders

* **Difficulty in adapting to the new role**

New roles often require different skills and leadership behaviours. However, under pressure, new leaders may rely on what made them successful in the past.

## Purpose of this guide

The purpose of this guide is to help you ***build your own transition 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.

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 before. 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.

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# What is my role [Back](#Leadership_transitions_checklist)

## Why use this tool

Use this tool to help you understand what is expected of you in your new role and prepare to be successful.

## When to use this tool

Use this tool as soon as you hear that you have been promoted.

## How to use this tool

Use your job description to help you fill out the tool.

1. List the ***main tasks*** that come under your accountabilities.
2. List the ***results*** that will show that you are successful in your new job.
3. ***Think about*** whether you will need ***help*** and what that help could be.
4. ***Add actions*** to your ***development plan***

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| Tip **Work with your new leader**so you have fair and achievable expectations, that support your new role. |

## Use the accountabilities set out in your job description to list your main tasks and identify the results you want to achieve.

| **Accountabilities & tasks**  List the ***main tasks*** that come under your accountabilities. | **Results that you want**  List the ***results*** that will show that you are successful in your new job. | **Do you need help?** | **What type of help?** |
| --- | --- | --- | --- |
|  |  |  | **☐** Discussion with your leader  **☐** Training  **☐** Other \_\_\_\_\_\_\_\_\_\_\_\_ |
|  |  |  | **☐** Discussion with your leader  **☐** Training  **☐** Other \_\_\_\_\_\_\_\_\_\_\_\_ |
|  |  |  | **☐** Discussion with your leader  **☐** Training  **☐** Other \_\_\_\_\_\_\_\_\_\_\_\_ |
|  |  |  | **☐** Discussion with your leader  **☐** Training  **☐** Other \_\_\_\_\_\_\_\_\_\_\_\_ |
| **Have a discussion with your leader!**  Are you focusing on the most important tasks? Who else can help you achieve the results you want? | | |

# From team mate to leader [Back](#Leadership_transitions_checklist)

## Why use this tool

Use this tool to work out what actions you can take to make it easier to move from ***being part of a team to*** the ***leader*** **of the team**.

## When to use this tool

Use this tool ***when you get promoted*** to your first leadership role, especially when you have been promoted from being part of the team that you will be managing.

## How to use this tool

1. Read ***the description of the areas*** that might have changed.
2. ***Think*** ***about the possible results of the change*** and what you can do about it.
3. ***Write down actions*** - what you can do to make sure that things work for you in your new role?
4. ***Add actions*** to your ***development plan***

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| Tips  * Use the tool ***before you start*** in your new job. Don't wait until you see signs of the team being unhappy * You need to establish yourself ***without acting like the promotion's gone to your head***. * Think about ***how you would feel*** if one of your teammates was promoted to being your boss. What would make you feel more comfortable? * This is a new and challenging situation for you. Seek out your manager for feedback, problem solving and support. ***Don't be afraid to ask for help.*** * **Remember discipline is a critical part of being a manager.** People become resentful when they see poor performers get away with low standards. |

| **Something has changed** | **Think!**  What are the possible results of the change and what can you do about it? | **Do you need to take action?**  Write down what you can do to make sure that things work for you. |
| --- | --- | --- |
| Your new job has changed, who reports to you and what you are responsible for. | ***People will want to know where they stand with you.***  How will you let people know how you want things to work? In team meetings? In one-on-one meetings?  How will you understand their concerns? |  |
| Your new job means that things are going to be different between you and your former teammates. | ***The change could make some people uncomfortable.***  Don't try to ignore the fact that things have changed. Be open about it.  How can you be seen to treat everyone equally and fairly, even those team members who are also good friends? |  |
| Your new job means that you need to ensure former teammates take responsibility for what they do. | ***Recognise people when they do well. However you can't ignore problems if they happen.***  Always follow up on good work and poor performance.  Remind each person in the team of what you expect of them. |  |
| Your new job means that you are not one of the team any more. | ***People won't always include you in the way they used to***  How will you make it easy for everyone to feel comfortable about coming to you with an idea or complaint?  Make sure you always pass on the information that management asks you to. |  |

# How do I work with others [Back](#Leadership_transitions_checklist)

## Why use this tool

Use this tool to help you understand how you work with others and to work out what you can do better

## When to use this tool

Use this tool as soon as you hear that you have been promoted.

## How to use this tool

1. ***Read the statements*** describing how you work with others
2. Decide ***how well*** ***each statement describes you*** and circle the right letter
   * A - never true
   * B – sometimes true
   * C – often true
   * D – always true
3. ***List what you can do better*** - Something you should remember? Something you should do?
4. ***Add actions*** to your ***development plan***

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| Tips  * Working well with others will help you in your new position so ***be honest!*** * Use this tool to ***get feedback from others***. Ask them to complete it giving their view of you. |

## Use this checklist to understand how you work with people

| **How do you work with your team and others?** | | **Think! How true is each statement?**  Circle **A** **B** **C** or **D** | | | | **Are there things you can do better?**  Check what you circled as **As** & **Bs**.  **As** & **Bs** show you where you can improve. |
| --- | --- | --- | --- | --- | --- | --- |
| Decide ***how well*** these statements describe the way you work with others - from ***never*** true to ***always*** true. | | **NEVER true** | **SOMETIMES true** | **OFTEN true** | **ALWAYS true** | List ***what you can do better*** - Something you should remember? Something you should do? |
|  | I work well with, and do not upset other people. | **A** | **B** | **C** | **D** |  |
|  | I listen to other people’s ideas and try them out. | **A** | **B** | **C** | **D** |  |
|  | I ﬁnd it easy to talk to and work with people I do not know well. | **A** | **B** | **C** | **D** |  |
|  | I think carefully about my faults and try to correct them. | **A** | **B** | **C** | **D** |  |
|  | I encourage others to perform well. | **A** | **B** | **C** | **D** |  |
|  | I am prepared to question the way we do things. | **A** | **B** | **C** | **D** |  |
|  | I ﬁnd it easy to encourage others. | **A** | **B** | **C** | **D** |  |
|  | I keep my feelings under control, even when others do not agree with me. | **A** | **B** | **C** | **D** |  |
|  | I take the time to make sure that others understand me. | **A** | **B** | **C** | **D** |  |
|  | I am patient with people who are slow at picking up ideas. | **A** | **B** | **C** | **D** |  |
|  | I am aware of people’s reactions to what I do or say. | **A** | **B** | **C** | **D** |  |
|  | I ask others for their ideas and opinions. | **A** | **B** | **C** | **D** |  |
|  | I actively seek comments on how I am doing. | **A** | **B** | **C** | **D** |  |
|  | I try to put forward useful ideas without ramming them down people’s throats. | **A** | **B** | **C** | **D** |  |
|  | I recognise when I'm being unfair. | **A** | **B** | **C** | **D** |  |
|  | I accept criticism. | **A** | **B** | **C** | **D** |  |
|  | When working with others, I think about what they want. | **A** | **B** | **C** | **D** |  |
|  | I don't get embarrassed when people give me compliments. | **A** | **B** | **C** | **D** |  |
|  | I think about people’s ideas carefully and don't jump to conclusions. | **A** | **B** | **C** | **D** |  |
|  | I'm always ready to ask for help when I need it. | **A** | **B** | **C** | **D** |  |
|  | I know I have a responsibility to make our team work well | **A** | **B** | **C** | **D** |  |
|  | I am open and honest in what I say to others. | **A** | **B** | **C** | **D** |  |
|  | I often back up others and their ideas. | **A** | **B** | **C** | **D** |  |

# What do I need to keep in mind [Back](#Leadership_transitions_checklist)

## Why use this tool

Use to this tool help you think about what you have learned about or been told in preparing for your new job and decide what is important.

## When to use this tool

Start using this tool as soon as you hear that you have been promoted. Ask for and write down any ideas, comments or suggestions as well as noting who said it.

## How to use this tool

1. Who made the comment or gave you the idea?
2. Write down the ***idea, comment or suggestion***.
3. Mark whether you think it is ***important*** for your new job?
4. Think about ***actions that you need to take or things to watch for.***
5. ***Add actions*** to your ***development plan***

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| Tips  * **Ask lots of questions.** Don't worry about having all of the answers. Ask questions that spark discussion. When people speak up, ask them to clarify their ideas so others can understand. * **Look beyond your team**. During this time, it's easy to become focused on your former teammates. But don't forget to build connections with new counterparts and your new boss. |

## Think about what you have learned in preparing for your new position and decide what is important.

| **Who**  Who made the comment or gave you the idea? | **What you learned or were told**  Write down the ***idea, comment or suggestion***. | **Important**  for your new job?  YES/NO | **Actions**  Actions that you need to take or things to watch for |
| --- | --- | --- | --- |
| **You** |  |  |  |
| **Your New Leader** |  |  |  |
| **Your Team** |  |  |  |

# How I will spend my time [Back](#Leadership_transitions_checklist)

## Why use this tool

Use this tool to make sure that most of your time is spent doing what you SHOULD be doing

## When to use this tool

* **When you take up your new position**, use the tool to think ahead about how you will use your time.
* **Use the tool regularly** to do quick reality checks on what you are doing and whether you are scheduling your activities well.

## How to use this tool

If you want to use your time well, you ***must*** prioritise what you do so that ***you use the time you have*** to do the most ***needed activities***. The mistake that most people make is NOT to see the difference between ***important*** and ***urgent*** tasks.

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| **Important tasks**   * Help you carry out your job objectives * Play a part in the way the organisation works   **What you are paid to do** | **Urgent tasks**   * Have a negative effect if left undone * Have a deadline - must be done by...   **What you often do ahead of important tasks - even if they're not important** |

## Important Vs Urgent Calculator for managing your time

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| --- | --- | --- |
|  | **Urgent** | **NOT urgent** |
| **I m p o r t a n t** | **Priority 1 activities** | **Priority 2 activities** |
| Crises Pressing problems Deadline-driven projects  **Top priority** Must give time now | Prevention Relationship-building Recognising new opportunities Planning Leisure time  **Important for job** Must give sufficient time |
| **N O T  I m p o r t a n t** | **Priority 3 activities** | **Priority 4 activities** |
| Interruptions, some calls Some mail, some reports Some meetings Pressing matters around you Popular activities  **Can disrupt** Assess first then decide | Trivia Keeping busy work Some phone calls Time wasters Pleasant activities  **Not essential** Only do if time available |

## Use this table to work out how you will spend your time

| **Tasks that need your TIME**  Check lists in ***What do I need to keep in mind***, ***How do I work with others*** and ***Team-mate to boss***. | **Is it urgent?** | **Is it Important?** | **Priority? 1,2,3,4** | **When do you schedule time?**  Daily? Weekly? Monthly? As they occur? Only after assessing first? | **How much time?** |
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# Build your 90-day plan [Back](#Leadership_transitions_checklist)

### Use this tool to build the plan that will help you make a successful transition into your new role. Use the *actions identified from all other tools in this guide* to help you build your plan.

### A rough guide on how to divide your plan.

### Your first 30 days - Reflection

"...learning should be a primary focus of your plan for your first 30 days on the job."[[1]](#footnote-1)

### Through conversations, interviews and meetings find out more about yourself and your new role

### Think about what you have learned and decide on important actions that need to be part of your transition plan.

### Identify opportunities for easy wins

### Your next 30 days - Planning

### Focus on building your team and seeking alignment across your department/business.

* 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.
* Keep track of what you have completed

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| Tips  * **Be open to suggestions and feedback.** This will help you develop a more thorough set of actions as well as build effective relationships. * Use people you trust to ***test your priorities***. * ***Remember the 80/20 rule***. Do not put in unneeded effort. * Save perfectionism for the tasks that need it. * ***Finally, always follow-up, measure, and check to see if the actions are doing what is required.*** * You need to self-check – "are you regularly following through on your most important actions?" |

## 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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| **Yourself** |  |  |  |  |  |  |
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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 next 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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| **Yourself** |  |  |  |  |  |  |
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| **Quick Wins** |  |  |  |  |  |  |
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| **Your leader** |  |  |  |  |  |  |
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## Develop your action plan for the final 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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| **Yourself** |  |  |  |  |  |  |
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| **Your Team** |  |  |  |  |  |  |
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| **Quick Wins** |  |  |  |  |  |  |
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| **Your leader** |  |  |  |  |  |  |
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# Build my development plan [Back](#Leadership_transitions_checklist)

## Why use this tool

Use this tool to help you think through your development objectives for your development plan.

## When to use this tool

Use this tool to help you ***identify your development objective*** ***before*** you create your development plan in ***PACE***

## How to use this tool

1. ***Decide which role*** you are going to build your development plan around i.e. your current role, a future role or is it about building general skills
2. ***Build your development objective***
   1. ***Work out the competencies/ skills required for the role***

* Use the **position description** and any other sources of information about the role. Use what you have learned from the tools you have completed in this guide*.*
* If you are focusing on your current role, then take into *c*onsideration your previous performance reviews.
  1. ***Rate yourself against each capability/ requirement for the role.***
* **Strength** - I consistently demonstrate this capability over and above the level expected.
* **Meets** - I consistently demonstrate this capability at the level expected.
* **Needs development** - I do not demonstrate this capability consistently or I do not demonstrate it at the level expected for the role.
  1. ***Note why you have rated yourself this way*** – Describe what you do well or what you need to be able to do. This will be helpful in giving you direction on your development objective.
  2. ***Describe your development objective***Use the ***SMART goals*** resource to help you build a good objective

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| Tips  * Remember, planning to ***use a strength*** is an important part of development planning * If you are focusing on a future role, consider talking to someone who can give you some ***insights into that role*** |

## Select the role this plan is to be built around - Current role ☐ Future role ☐ or General skill set ☐

## Build your development objective

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| **a. Requirements for the role** | **b. Your evaluation** | **c. Note reasons for any gaps** | **d. Your development objective** |
| List the ***competencies/ skills*** required for success in the role | * Needs development[[2]](#footnote-2) * Meets[[3]](#footnote-3) * Strength[[4]](#footnote-4) | List what you do well or what you need to be able to do | Describe the objective that you will set yourself in your development plan |
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1. Ibid. p.49. [↑](#footnote-ref-1)
2. **Needs development** - I do not demonstrate this consistently or I do not demonstrate it at the level expected for the role. [↑](#footnote-ref-2)
3. **Meets** - I consistently demonstrate this capability at the level expected. [↑](#footnote-ref-3)
4. **Strength** - I consistently demonstrate this capability over and above the level expected. [↑](#footnote-ref-4)