



Your First Ninety Days in a New Management Position

by Mike Hawkins
mike@alpinelink.com



First impressions are hard to change. So are “first actions”. What you do in your first ninety days after assuming responsibility for a new organization is critical. Your first actions are closely watched by your direct reports, boss(es), peers, and customers. Your first actions set your tone and planned direction for the organization. Your first actions determine the likely outcomes and results you will produce.

If I were taking a new management position, I would concentrate my energy in the first ninety days on learning as much as I could about my organization and the market we serve. As I learned, I would formulate opinions on what was working and what needed to be changed. I would resist the temptation to get sucked into tactical operational execution. By the end of ninety days, I would make my assessment of the organization and set the direction for it.

Listed below are the primary areas that I would focus on if I were taking over an organization as a new senior manager. These are also the areas I would assess as a management consultant if I were on a broad business assessment engagement. I hope you can put this list to good use someday.

1. **Research the Organization** – As soon as you know you’ll be taking a new management position, start researching the organization you’ll be leading. Talk to people who know the organization. Go through the organization’s website. Study any industry or analyst reports that are available.
2. **Make a Positive Introduction** – When you come on board, make a positive first impression. Start off with a confident and genuine introduction. Be authentic and assured. Prepare and deliver a cogent introduction speech.
3. **Set Initial Expectations** – Announce your general expectations for the first ninety days. When a new manager comes onboard, everything in-progress comes into question. Approvals, internal projects, new hires, and important decisions are assumed to be on hold or in need of review. As part of your introduction, announce your operating intentions for the first ninety days. Let people know what you expect to continue as currently planned, what will be put on hold, and by what principles you expect people to operate until further notice.
4. **Review Financials and Legal Matters** – If there are significant problems or immediate issues in your organization, engage them first. Otherwise start with a review of the current financial statements and legal matters.
5. **Understand Mission, Vision, and Values** – Understand the organization’s vision and mission. Understand the organization’s values, history, and culture. Talk to people about “how things get done around here”.
6. **Understand Current Objectives** – Understand the objectives for your organization. If your organization is part of a larger organization, understand the objectives for the overall organization. Know your boss’s objectives and priorities. If you report to a Board, get to know each member of the Board and their expectations.
7. **Meet Your Team** - Meet with your team. Get to know them individually. Assess their strengths and weaknesses. Ask for their ideas about what is working well, areas for improvement, and new opportunities that might be leveraged.
8. **Assess the Market** – Understand your target market, market forces, market trends, and market structure. Understand the primary competitors, suppliers, customers, and other players in the market.
9. **Review Strategy** - Review the current business strategy, value proposition, sales/marketing strategy, routes to market, operations/distribution strategy, partnerships, and other strategic considerations.
10. **Review Sales** - Review the sales forecast, sales coverage model, sales resources, and sales approach. Assess the strength of the sales pipeline. Probe into the details of the critical paths to closing any upcoming significant transactions.



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11. **Assess the Talent** - Review the organizational structure, headcount by department, and hiring plans. Understand the critical roles including the level of performance and engagement of people in those roles. Review the compensation structure and recognition process. Review employee development and training programs. Review the human resource department's initiatives and organizational development capabilities.
12. **Get to know the Products and Capabilities** – Review the current products, services, roadmaps, research, and development programs. Understand what is being delivered to the market and planned to be delivered against what is needed to be delivered to execute the current strategy. Get to know the product and delivery capabilities of the organization.
13. **Review Operations** - Review the operations in each of your business units including their core processes, systems, and programs. Review the detailed operational plans including financials and key performance measurements. Look at each major department such as engineering, production, procurement, marketing, distribution, and customer service.
14. **Meet with Outsiders** – Meet with your external stakeholders, customers, investors, strategic suppliers, and partners. Assess their current satisfaction levels and needs. Ask for their ideas and suggestions. Start building relationships with influential people outside of your organization.
15. **Make Your Initial Assessment** - With an understanding of your organization and the market you serve, make your initial assessment. Request assistance from outside subject matter experts in any areas you are not fluent. Assess the strategy, people, products, processes, systems, operations, and other relevant elements within your area of influence and responsibility.
16. **Gauge Reactions** - Test people's reactions to your observations and any changes you are considering. Using general terms, gauge your boss's, employee's, customer's, and other stakeholder's reactions to your initial assessment.
17. **Make Your Assessment** – After receiving feedback and validation of your observations, formulate your ninety-day assessment. For the areas that need adjustment, determine the changes that need to be made and/or new direction that needs to be taken. Evaluate viable alternatives where appropriate. Craft your high-level ninety day assessment and planned course of action.
18. **Set the Direction** – Announce the high-level results of your assessment and your planned course of action. Let people know what you've observed. Set the new direction and your agenda for change.
19. **Build Support** – Build support for your plan and anticipated changes. Start with your top managers and continue throughout the entire organization. Ensure everyone understands the direction you are taking them.
20. **Take Action** - As *Good to Great* author Jim Collins suggests, get the right people on your bus first. Put the right people in the right roles. Once in place, give your agents of change unambiguous responsibility and direction. Give them the resources and empowerment they need to put your plans into action.

Accomplish these twenty actions in your first ninety days and you'll be off to a great start.

Article written by Mike Hawkins, award-winning author of *Activating Your Ambition: A Guide to Coaching the Best Out of Yourself and Others* (www.activatingyourambition.com), and president of Alpine Link Corporation (www.alpinelink.com), a consulting firm specializing in leadership development and sales performance improvement.

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