



Your First Ninety Days in a New Management Position

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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, peers, and customers. Your first actions set your tone and planned direction for the organization. Your first actions have a significant impact on the outcomes you expect to produce.

What should you do in your first ninety days? Do you assert yourself and try to make an immediate impact? Or do you concentrate on learning as much as you can? Do you focus on building relationships or reviewing organizational activity? You will likely formulate opinions quickly on what is working well and what needs to be changed, but unless an immediate change in direction is called for, be slow to speak and quick to listen. Resist the temptation to get sucked into tactical operational execution. That will come soon enough. Use your first ninety days to formulate your assessment and focus on the strategy you plan to pursue.

Listed below are twenty elements to consider as you plan your first ninety days:

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 positive message that appeals to people’s minds as well as their hearts. Make respectful comments about the great work that has been done before you.
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 current vision and mission. Understand the values, history, and culture. Talk to people about “how things get done around here.”
6. **Understand Current Objectives** – Understand the current objectives of the organization. If your organization is part of a larger organization, understand the objectives for the overall organization. Know your boss’s desired outcomes 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 capabilities and weaknesses. Ask for their ideas about what is working well, areas in need of 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 influences on the market.
9. **Review Strategy** - Review the current business strategy, value proposition, sales/marketing strategy, routes to market, operations/distribution strategy, strategic partnerships, and sources of competitive differentiation.
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 any upcoming significant transactions.
11. **Assess the Talent** - Review the organizational structure, headcount allocations, and hiring plans. Understand the critical roles and the performance of people in those roles. Understand the compensation structure and recognition



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systems. Review employee development and training programs. Review the human resource department's initiatives and planned organizational development activities.

12. **Become Familiar with Products and Capabilities** – Review the current products, services, roadmaps, research, and development programs. Understand what is being delivered to the market and in the pipeline. 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 key performance measurements. If you are in general management position, 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 how well the strategy, people, products, processes, systems, and operations are aligned to the needs of the market and the organization's vision.
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 new direction to be taken. Evaluate viable alternatives where appropriate. Craft your ninety-day assessment and planned course of action.
18. **Set the Direction** – Announce the results of your assessment and your planned course of action. Let people know what you've observed. State the goals to be pursued. Explain the “why” for your direction, goals, and agenda for change.
19. **Build Support** – Build support for your plan and anticipated changes. Start with your top managers and continue to secure buy-in 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 coaching, encouragement, 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.

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