THE FIRST 90 DAYS

NAME:
JOB TITLE: Chief of Staff
DIRECT REPORT: CEO
DATE

1. **THE ABILITY TO SUCCESSFULLY TRANSITION INTO A NEW ROLE IS A CRITICAL SKILL**

   - Invest time and effort into getting good at role transitions.
   - A successful career is a series of new assignments, all of which require successful transitions.
   - Leaders experience a major role transition every one and a half years on average.
   - Your transition begins the moment you learn you are being considered for a new role.

2. **YOUR TRANSITION AFFECTS OTHERS AND VICE VERSA**

   - Your transition into a new role impacts the performance of other people including your Manager, peers, direct reports, friends, and family members.
   - Your performance is affected by others' transitions too.

3. **THE BREAK-EVEN POINT**

   - When you start a new role, you consume value as you learn and prepare to take action.
   - As you get up to speed, you begin to produce value.
   - You reach the break-even point when you have contributed as much value in your new role as you have consumed from it.

- The goal of every role transition is to reach this break-even point as fast as possible, ideally in the first 90 days.
- Regardless of the situation, when you transition into any new role, your new stakeholders will expect you to demonstrate some traction in the first 90 days.

4. **AVOID CREATING VICIOUS CYCLES AND FOCUS ON CREATING VIRTUOUS ONES**

- Your goal in your first 90 days is to create virtuous cycles while avoiding vicious ones.
- With vicious cycles, poor decision-making leads to reduced credibility.
- Reduced credibility leads to reduced trust.
- Reduced trust leads to reduced access to information and a higher risk of falling into additional traps.
- With virtuous cycles, good decision-making leads to increased credibility and trust which leads to access to more information that allows you to make even better decisions.
- Most people fail in new roles for one of two reasons. Either they misunderstand the situation they're walking into or they fail to adapt to it.

    AVOID:

    - *Sticking with what you know*. You'll fail to embrace new concepts.
    - Assuming that what made you successful in your previous role will make you successful in your new role.
    - The strengths that are assets in one role can become liabilities in a new one.
    - *Falling prey to the "action imperative."* You try to take action too early without the necessary context.
    - *Setting unrealistic expectations.* You don't establish clear, achievable objectives.
    - *Attempting to do too much.* You don't focus enough to progress key initiatives.
    - *Coming in with "the" answer.* You make poor assumptions and reach poor conclusions about problems and solutions.
    - *Engaging in the wrong type of learning.* You don't take time to learn the culture and politics of your new role.

- ■ *Neglecting horizontal relationships.* You fail to build supportive alliances with key stakeholders who fall outside of your vertical reporting structure.

5. HOW TO APPROACH YOUR FIRST 90 DAYS

Fundamental principles you can focus on to ensure your success:

- ○ *1. Create a plan.*
- ○ *2. Learn and align.*
- ○ *3. Develop relationships.*
- ○ *4. Establish credibility.*
- ○ *5. Assess existing team structure, integrate yourself into it, and determine what may be/is needed for long term success.*

STEP 1: CREATE A PLAN

- ■ Create a plan for your first 90 days (30-60-90).
- ■ Include specific goals, priorities, and key milestones that you and your Manager agree to.
- ■ Before you create your 90-day plan, make sure you identify and understand the specific types of transitions you're experiencing.
- ■ Clarify the situation you are coming into. Different situations require different strategies.
- ■ Joining a company in crisis is not the same as receiving a promotion in an organization that is enjoying success. Once you understand the situation, you can then choose a transition strategy that fits it.
- ■ STARS is the five common business situations leaders transition into:
    - ■ S stands for Startup.
    - ■ T stands for Turnaround.
    - ■ A stands for Accelerated Growth.
    - ■ R stands for Realignment.
    - ■ S stands for Sustaining Success.
- ■ It's rare for a transition to fit perfectly into one of the five STARS situations, but it's useful to evaluate each of your new responsibilities through the STARS lens.
- ■ Knowing the STARS situation for a particular initiative can help you pick the right approach during your 90 days.
- ■ In a startup situation, you need to get a new business or initiative going from zero to one. The challenges are figuring out how to get everything to

work, recruiting high performers amid uncertainty, and operating with constrained resources.
■ The advantages are that you get to do things right from the beginning and you can move fast. There usually aren't rigid policies and procedures in place to slow you down.

STEP 2: BREAK YOUR PLAN INTO THREE 30-DAY MILESTONES:

30 Days:

■ Dedicate your first 30 days to learning and building personal credibility.
■ What's the org chart?
■ What're the core systems?
■ What're the core processes and handoffs?
■ What're the operating and communication cadences?
■ Who are your key stakeholders?
■ Consider collecting 360-degree feedback after the first month to gauge how you're doing.

60 Days:

■ The output from your first 30 days is often a situation assessment (or diagnosis) along with a plan for how you will spend the next 30 days including how you will secure some early wins.

90 Days:

■ At the 60-day mark, you might focus on assessing your progress toward your plan's goals and what you're on track to achieve by the end of your first 90 days.

STEP 3: LEARN AND ALIGN

■ When you start a new role, it often feels like you are drinking from a fire hose. There is so much information and it's unclear where you should focus.
■ Identify what you need to learn and then learn it as fast as you can.

- Strike a balance between doing (taking action) and being (observing and reflecting).
- When you take action without investing time in learning, it can lead to poor decision-making that can undermine your credibility.
- The goal of your learning plan is to help you clarify your company's strategic direction so you can align with it.
- Create a learning plan.
- Start by defining what you need to learn.
- List out questions in the following areas to avoid surprises:
  - *Business.* What are the plans, markets, products, systems, and processes?
  - *People.* What relationships do you need to develop?
  - *Culture*. What are the cultural norms?
  - *Politics.* What landmines do you need to avoid?
  - *Trends.* What macro trends present threats or opportunities?
  - *Competition*. What is the competition and what are they doing that present a threat?
  - *Fires.* Are there problems with current processes or people that could turn into fires?
- Next, identify sources of information that can aid in your learning.
- Learn from both hard data (i.e. reviewing financial and operating reports, plans, and employee surveys) and soft data (i.e. talking to people).
- Make sure to leverage both external and internal sources. Reviewing information from different points of view will deepen your insight.
- The most valuable external sources of information include customers, suppliers, distributors, and outside analysts.
- The most valuable internal sources include frontline team members, cross-functional staff, and the people who have been at the organization the longest.
- Consider using structured learning processes to save time and avoid bias. For example, script your one-on-one conversations to ensure you ask the standard questions.
- You can also employ frameworks such as a SWOT (strengths, weaknesses, opportunities, and threats) analysis to guide your diagnostic work.
- An organization's culture is the set of consistent patterns its people follow when communicating, thinking, and acting based on their shared assumptions and values.
  An organization's fundamental assumptions and values are often invisible and take time to become clear.

- Pay attention to visible representations of culture like symbols and languages. These include things like logos, dress codes, office design, and shared language like acronyms.
- Note cultural norms. These include patterns of behavior like how people build support for initiatives, how recognition is handled, how conflict is resolved, and how meetings run.
- Pay special attention to areas in which how you accomplish something is more important than getting it done.

STEP 4: DEVELOP RELATIONSHIPS

- When you start a new role, you often have to develop new relationships to succeed.
- Start by building a productive relationship with your Manager.
- Understand how you and your Manager can best interact and work together on an ongoing basis.
- Be sure to cover communication preferences and decision-making processes.
- Make sure you understand what resources you have at your disposal and the process for securing additional resources when you need them.
- Make sure you have clear expectations.
- Even if you're sure you know what your Manager expects, you should regularly reconfirm and clarify.
- Ambiguous goals and expectations are dangerous. What will constitute success? It's better to underpromise and overdeliver than to overpromise and underdeliver.
- Identify the areas that are important to your Manager and get some quick wins.
- Negotiate timelines for an initial diagnosis and follow-up action plans. Your 90-day plan is an excellent vehicle for this. For example, you could say: "Let's operate on a 90-day time frame. Give me 30 days to get on top of things. Then, I will bring you a detailed assessment and plan with goals and actions items for the next 60 days."
- Understand how your new Manager sees the situation(s) you have inherited and how her view differs from your initial assessment.
- Once you get buy-in from your Manager on your 90-day plan, it serves as a "contract" between the two of you about how you're going to spend your time.
- Once you get started, be sure your Manager is aware of the issues you face.
- Provide regular updates and avoid surprises.
- Give your Manager a heads-up as soon as you become aware of a problem.
- When you share problems, also suggest potential solutions.

- Meet regularly and when you meet, prioritize discussion on what's most important.
- Don't expect your Manager to change.
- It's your responsibility to adapt to your Manager's preferences and make the relationship work.
- Make sure you understand what you're doing well, what's not going well, and where you can improve.
- Remember that your new Manager's opinion of you is influenced by what he hears about you from others. Develop relationships with the people your Manager's respects.
- Once you and your Manager are on the same page, focus on developing relationships with your new direct reports if you have them.
- Seek their input on the biggest challenges and opportunities at the organization along with what priorities they believe deserve the most immediate attention.
- Get to know them personally and professionally.
- You will also need support from people whom you hold no authority over. In your first 90 days, you should identify all stakeholders whose support is critical for your success and align with them.
- This is building up your "relationship bank accounts". Depending on the situation, you may find one of the following influence techniques helpful:
  - *Consultation.* Pose questions and encourage people to voice their real concerns. Then, summarize what you've heard.
  - *Framing.* Craft persuasive arguments on a person-by-person basis.
  - *Choice-shaping.* Make it hard for people to say no based on their perceived alternatives.
  - *Social influence.* Leverage the support of high-influence stakeholders to gain the support of others.
  - *Incrementalism.* Start small and build from there.
  - *Sequencing.* Be strategic about the order in which you influence people to build momentum.
  - *Action-forcing events.* Create forcing functions like meetings and deadlines to make it hard for people to delay decisions or avoid commitment.
- Finally, start building out your third-party advice network. It should include people you can turn to when you get stuck.
- You need trusted advisers outside of your organization who can help you evaluate markets and strategy, adapt to the culture, and navigate politics.

STEP 5: ESTABLISH CREDIBILITY

- When you start a new role, it's critical to establish credibility.
- Your credibility depends on how people view your ability to make tough decisions, whether you have values they want to emulate, and the level of performance you demand from yourself and others.
- Credible leaders walk the fine line between building momentum and overwhelming.
- People perceive new leaders as more credible when they get people to make realistic commitments and then hold them responsible for achieving results.
- Credible leaders also give people the autonomy to achieve results in their own way.
- They're decisive when they need to be, but they're also comfortable delaying non-urgent decisions to ensure they make the right call.
- And when they do make a tough call, credible leaders are humane.
- They do what needs to be done in a way that preserves people's dignity.
- One way to build credibility and momentum is to secure early wins.
- By the end of your first 90 days, you want your Manager, your peers, and your direct reports to feel like something new and good is happening.
- Similarly, you want to avoid early losses because it's difficult to recover from them.
- Your early wins should help you progress your 90-day plan while also laying the groundwork for your longer-term goals.
- You'll achieve more substantial wins in future initiatives.
- To secure wins the right way, focus on a few promising opportunities and avoid spreading yourself too thin.
- Prioritize wins that matter to your Manager.
- Finally, make sure you get wins in a way that is consistent with your organization's culture.

STEP 6: ASSESS AND BUILD YOUR TEAM

- In the first 90 days, assess the alignment of the organization.
- Start with the mission, vision, and strategy.
- Then, dive into how people are organized and coordinate to get work done.
- Next, identify the core process and activity that create value.
- Finally, assess the capabilities of the workforce.
- Your goal during your first 90 days is to identify potential misalignments and design a plan for correcting them.
- The most important decisions you make in your first 90 days are often about people.
- Building a high-performance team gives you tremendous leverage.

- However, you have to strike the right balance between stability and change.
- You want to avoid forcing too much change at once, but you also don't want to wait too long.
- You should make the key changes to your team in your first 90 days.
- Start by assessing your existing team members.
- By the end of your first 30 days, you should be able to group your people into high performers, potential high performers, and low performers.
- Then, decide what changes you need to make and how you can make them without damaging short-term performance.
- Make sure your top performers know where they stand and retain them.
- You don't want to lose your best people.
- Avoid criticizing the previous leadership. There's nothing to be gained from this and it can damage your credibility.
- Identify problematic behavior patterns. You may notice a lack of focus, discipline, teamwork, urgency, or creativity.
- Some team members may not be able to clearly define priorities or have too many priorities. Some team members may lack self-accountability.
- Hold off on team-building until you let the lower performers go.
- It confuses your team members when you let go of people they've begun to form bonds with.
- When possible, wait to implement major new initiatives until you have the team in place.
- It's often counterproductive to commit a future team member to a course of action they did not choose.

RANDOM ANECDOTES:

- Leadership is about influence and leverage.
- To succeed, you need to harness the energy of others.
- The higher you rise in an organization, the more you play the role of company architect.
- Recruiting is romance. Employment is marriage.
- What works well in one organization or role may fail in another.
- There is no one-size-fits-all approach to leading change.
- Your ability to adapt and self-manage depends on both self-awareness and personal discipline
- Effective delegation requires you to translate higher lever goals into specific jobs, fill those jobs with competent people you trust, and establish metrics to monitor their progress.

- How you approach delegation varies based on whether you are delegating tasks, projects, processes, or outcomes. For example, outcomes require more strategic context than tasks.