

Transitional Leader 100-Day Checklist

Pre-Start

- Is your family settled?
- Is your office set up and all administrative onboarding complete?
- Have you reached out to key internal relationships – direct reports, peers, other stakeholders – to connect and begin to build rapport?
- Have you crafted your elevator speech and key messaging summing up why you’ve taken on the new role and how you believe you can contribute and add value?
- Have you taken any recommended assessment(s) (e.g. Strengthsfinders) to further self-awareness and insight?
- Have you completed your Culture Questionnaire (if available) for insight and identification of potential experiential gaps between past and current cultures?
- Have you received input and completed a SWOT analysis?
- Have you identified a few stakeholders for early feedback loop?
- Have you been briefed on and identified key internal and external contacts/influencers for “Listen & Learn” Tour?
- Have you had the opportunity to “sit in” on critical business meetings?
- Have you organized and orchestrated your agenda for day one?

0-30 Days

- Do you understand the top priorities of your boss and/or board of directors? How will you ensure alignment?
- Do you understand the leadership success attributes for success in this new role? What would cause you to fail?
- Have you met with your team (at least once; preferably more) to begin building trust, credibility and operational leadership, demonstrate awareness of critical operational issues and ability to problem solve and make decisions around urgent operational issues; identify early wins?
- Have you reviewed the organizational structure to begin to determine any needed changes?
- Have you ramped up your “Listen & Learn Tour” for structured listening and knowledge gathering with key internal and external contacts/influencers to establish rapport, begin to build relationship capital, gain insight, understand history and expectations, identify centers of power and influence (supporters, detractors, watchers), etc.?
- Have you engaged with your HR partner (and other key stakeholders) to understand team dynamics and history; review past performance and assessment of direct reports and other key personnel; and review talent management process, existing rewards (compensation, incentives), recognition (celebrating wins) and systems/culture, and employee engagement process and measurement?
- Have you met (at least once) 1:1 with direct reports to establish rapport and begin building trust; review past/present performance, career path, motivation, morale, and goal setting; set expectations; and set on-going touch base schedule?
- Have you scheduled your New Leader Assimilation session with direct reports and communicated goal of the session?
- Have you assessed existing communications vehicles to facilitate on-going bi-directional communications flow; established your 100-day communication plan; and longer-term communication plan?
- Have you developed understanding of values, cultural norms, and guiding assumptions that define acceptable behaviour?
- Have you begun to evaluate context and culture to assess readiness for change – assimilate, converge and evolve (fast or slow), or shock?

- Have you met with CFO and other key Business Unit Executives to assess current state of the business, and reviewed achievement against budgets (multi-year), action plans, trends and appropriate operational data?
- Have you engaged your Marketing partner to understand market, customers and how profitability and satisfaction are measured?
- Have you reviewed and assessed metrics employed to measure success: customer satisfaction, employee engagement, segment reporting, market share data, etc.
- Have you reviewed and assessed technology capabilities and opportunities?
- Have you established a feedback loop with early, few stakeholders?

30-60 Days

- Have you conducted deep-dive review of existing strategy and growth plans at all levels; and gained understanding of strategy support by key invested stakeholders (board, investors, etc.)?
- Have you reviewed and assessed operational rhythms and integration with cross groups: orchestration with finance, HR, marketing, IT, risk management, etc.?
- Have you assessed and analysed budgeting process, capital planning and forecasting tools?
- Have you developed key milestones and mechanism to drive operational accountability and track progress?
- Have you conducted New Leader Assimilation session with direct reports to accelerate introductory period?
- Have you conducted a team offsite to co-create and solidify the team's Quick Start plan to drive consensus around mission, vision, values, objectives, goals, strategies plans and operating cadence?
- Have you identified and over invested in early wins; and celebrated to gain confidence and build momentum towards creation of high performing team?
- Have you established a call strategy and operational rhythm to regularly visit markets and key stakeholders?
- Have you engaged with early, few stakeholders for constructive feedback?

60-100 Days

- Have you reviewed key external inputs and market opportunity related to growth strategy?
- Have you assessed need to shape and/or change existing strategy; begun communication and consensus building with key stakeholders; and identified related talent management and organizational needs to successfully execute?
- Have you identified mechanism for team input into evolving strategy (vision setting exercises, leverage high potentials)?
- Have you engaged with HR partner and finalized transition plan to have "right people in right roles"?
- Have you solidified plan to deliver operational excellence with continued milestones, accountability, and recognition for early wins?
- Have you developed clear timeline to enhance multi-year growth plan that supports strategy to exceed financial and non-financial targets to maximize shareholder value?
- Have you begun implementation of operational rhythm and forecasting process by business unit that provides a view of business state and projections toward meeting future goals?
- Have you continued to engage with early, few stakeholders for constructive feedback?

100 Days and beyond

- Have you articulated an inspiring strategy, mission and vision to achieve stakeholder and team support and acceptance?
- Have you identified best vehicle to track and communicate progress towards plan?
- Have you ensured every employee ultimately understands plan as well as their role and progress toward achieving?
- Have you effectively evolved and solidified culture?
- Have you conducted 360-degree feedback process using structured assessment and/or personal interviews to gauge progress; reviewed feedback?
- Have you created individual development plan?
- Do you have predictable rhythms in place?
- Is ongoing people and talent management in place?
- Are strategic annual reviews and updates in place?
- Are operational annual plan review and updates in place?
- Are business unit reviews conducted (at least) quarterly?
- Are milestone updates and adjustments done regularly (monthly)?