

90 Day Plan **Template**

Stay focused and make a positive impact with this 90 Day Plan



Contents - 90 Day Plan

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90 Day Checklist

Prompts for the first 90 Days

Focus Areas	
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<p>1. The Organisation</p> <p>Understand the Company’s purpose, values, objectives, structure and priorities for the next 1-3 years.</p> <p>Understand the role the team plays in delivering the business objectives.</p> <p>Get to know the culture of the organisation.</p> <p>Understand and confirm timing of company/external reporting requirements and expectations of the team.</p>
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<p>2. The Team</p> <p>Get to know the team including priorities, challenges, motivators and aspirations.</p> <p>Complete SWOT analysis with the team – what’s working and what’s not working, opportunities and threats.</p> <p>Review the current operating rhythm (1-1 and team meetings, reporting, working from home, leave planning).</p> <p>Review employee engagement data and discuss insights with the team. Agree areas of focus.</p> <p>Confirm the capabilities required in the team to deliver business objectives and complete initial individual assessment.</p> <p>Assess team resource levels including gaps/risks to meet business requirements. Who is stretched/has surplus?</p> <p>Review current vacancies in the team to ensure positions will meet most urgent/important business needs.</p> <p>Assess planned training to ensure it aligns with business needs and individual development plans.</p> <p>Confirm team and individual objectives - review and agree with team.</p> <p>Assess level of team efficiency (level of automation, waste, duplication, role clarity etc).</p>

90 Day Checklist

Prompts for the first 90 Days

Focus Areas	
<input type="checkbox"/> <input type="checkbox"/>	<p>3. Stakeholders</p> <p>Identify and meet with key stakeholders and seek feedback on what they need from the team.</p> <p>Seek feedback on how the team adds value to the business and current gaps.</p>
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<p>4. Due Diligence</p> <p>Identify key risks in the team (operational, reputation, etc) and controls required to manage/eliminate them.</p> <p>Review recently completed and current audit actions that require ongoing focus.</p> <p>Analyse the budget and major cost areas including areas of overspend or surplus.</p> <p>Review significant people cases in the team/organisation (e.g. long-term sick leave, grievances, performance issues).</p> <p>Assess casual employees to ensure working conditions are compliant.</p> <p>Review team activities and assess health and safety risks.</p> <p>Initial review of policies and procedures to ensure they meet business requirements.</p> <p>Assess status of current projects including delivery of objectives on time, on budget and sufficient resources.</p> <p>Clarify expectations regarding gifts/expenditure/travel in line with business policies.</p> <p>Meet with key suppliers to the team (systems, products and services) to understand business needs and value offered.</p>

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The Business

Business Objectives

- What is the organisation's purpose, values and long-term strategy/objectives? (Use the Essentials Checklist to source information about the organisation).
- What role does the HR team/your team play in delivering the business strategy?

Culture

- What words would you use to describe the culture of the organisation? How are decisions made? How is conflict resolved? What is unique about the organisation?
- What differentiates the organisation from other companies? How does the culture compare to the published values/aspirational culture?

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The Team

Use the template below to get to know your team. See the [Get to know the team questions](#) for a more comprehensive list.

Tell me about you and your role	Notes
Tell me about your role. What are the main priorities and measures of success? How does your role benefit the business and/or external customer? What do you enjoy most/least about your role?	
What achievements are you most proud of? What business value did they deliver ?	
What are the main challenges in the role/team? What gets in the way of getting things done? What support do you need?	
What are your strengths and development areas? What are you focusing on as part of a personal development plan?	
What does success look like for you personally in the next 1-2 years? Where do you see yourself in 2-3 years? What experience/capabilities do you need to get there?	
What type of working environment do you thrive in? What role do you typically play in the team/business?	
What one thing would you change in the team or organisation? What do you need from your leader?	

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Stakeholders

Who are the main stakeholders to meet in the first 1-3 months?

- List stakeholders impacted by your team and/or who are key decision makers and influencers in the organisation. Use the stakeholder template on the next page

What challenges have you or stakeholders identified that require your focus in the next few weeks?

- Tip - Think about how will you manage expectations when having conversations with stakeholders.

SWOT Analysis (Strengths, Weaknesses, Opportunities & Threats)

Scope:

Strengths	Weaknesses
<ul style="list-style-type: none"> • What's working well/things to build on/keep doing. • What has the HR team done to contribute to company success? • Things that give the organisation/team a competitive advantage or makes the team unique? 	<ul style="list-style-type: none"> • Things that are not working well/things that need to change/stop or are underperforming. • Obstacles that need addressing or things that are getting in the way of the strategic direction. • Things that are a competitive disadvantage compared to the competition. • Gaps in capabilities or resources. • What internal factors make it difficult for the team to meet its objectives.
Opportunities	Threats
<ul style="list-style-type: none"> • External factors that could benefit the organisation/team if acted upon. • Opportunities for growth. • What external resources could be used? • What investments would help the organisation/team be more efficient? 	<ul style="list-style-type: none"> • Things that other organisations/competitors/other HR teams are doing better. • How does the market view your organisation? • Consider new technologies, laws or regulations that may impact the organisation/team.

SWOT Analysis (Strengths, Weaknesses, Opportunities & Threats)

Scope:

Strengths	Weaknesses
Opportunities	Threats

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Defining Success

What does success look like in the role in the first 1, 3 and 6 months?

- Be realistic (and stretching) and check assumptions with your leader and stakeholders. Reflect on “why was I hired for this position?” and “What foundations are important in the first few months in the role?” What does personal success look like for you personally? What do you want to develop?
- Think strategically – what will be important in 1-2 years? What will deliver the most business benefits? What will stakeholders be saying if the team is doing a great job?

What benefits will the business see in the first 1, 3 and 6 months? What are the key success measures?

- Be as specific as possible including metrics of success

Personal Observations

Remember to capture your observations in the first few months in the role. Your fresh perspective will fade over time – make the most of it!
 And – seek to understand. Listen first and find out “why” things are done differently.

How would you describe the culture of the organisation?	How would you describe the culture of the team?
<ul style="list-style-type: none"> • Include specific examples that describe how you came to this view • What 3-5 words would you use to describe the organisation? • How is the culture aligned to published values or the organisation’s purpose? 	<ul style="list-style-type: none"> • To what extent are the team working together? • How is conflict managed and resolved? • What steps have been taken to build the team (e.g. personality profiles, off sites)

Personal Observations

Remember to capture personal observations in the first few months in the role. Your fresh perspective will fade over time – make the most of it!
 And – seek to understand. Listen first and find out “why” things are done differently.

How would you assess the technical capability of the HR team?	What makes the company different?
<ul style="list-style-type: none"> • Be as specific as possible – what has led you to this view? • What methods are used to increase technical capability? Have there been any formal assessments? 	<ul style="list-style-type: none"> • What does the company do differently and why? • What is the impact of these differences?