

Q1 Action Plan | 30-60-90 Day Plan

Prepared for: Company Name

Prepared by: Your Name

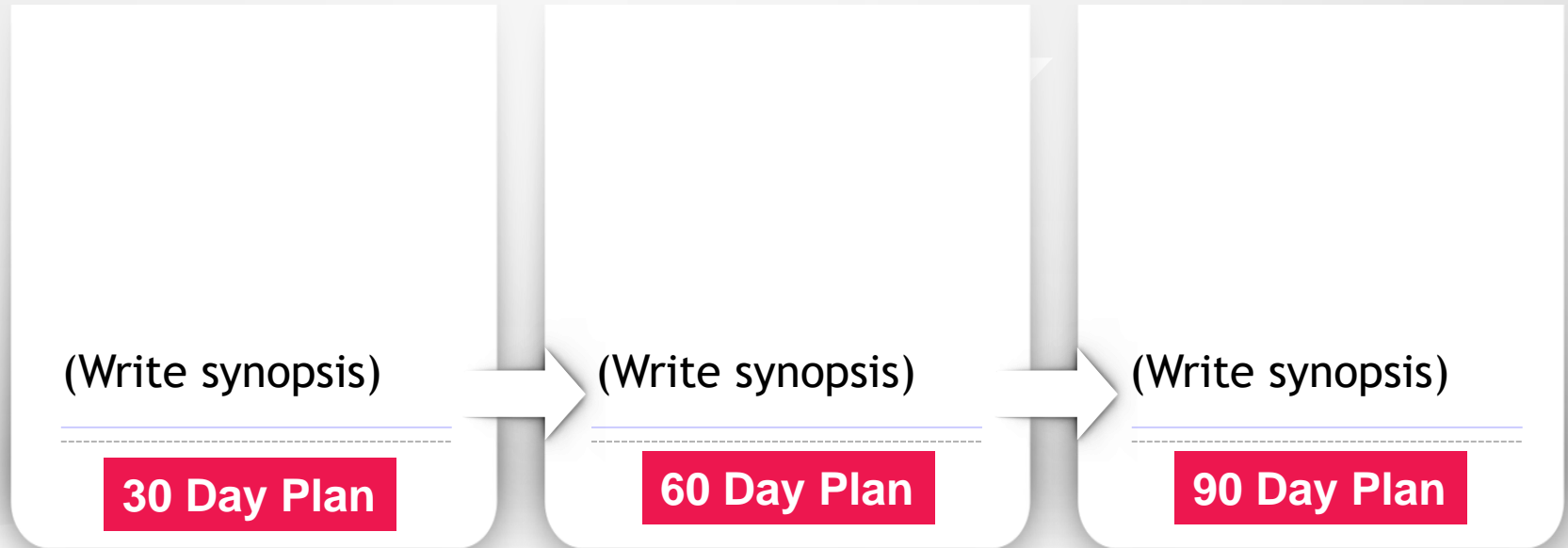
Add company logo



**CN16G (accompanies
Interview Preparation Q1
Action Plan – Background)**

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Overview



30
Days

Orientation & Environmental Scan

- Know the market position (shrinking, growing, etc.)
- Market strategy, company processes, products and services
- Check in daily with the team to assess approach
- Understand the regulators of this industry, company
- Understand the suppliers to this company
- Understand the clients of this company
- Understand the employees of this company
- Know your team and their direct reports

Environmental Scan

- Market strategy, company processes, and products and services
- Master relevant subject matter
- Learn about primary competition
- Learn procedures for paperwork, reports, e-mail
- Orientation
- Meet with the board and its committees to prioritize what is expected

Identify Top Priorities:

- Top 10 current products/clients/services
- Identify “problem” issues or most “at risk” areas
- Top 10 potential products/clients/services
- Top competitive companies
- Evaluate processes, product success, or services
- Regulatory landscape
- Analysts’ quarterly calls

30
Days

Contact Customers and Stakeholders

- Introduce yourself via letter, telephone, LinkedIn or e-mail
- Visit top revenue-generating clients or customers:
 - What is their business?
 - Are they regulated?
 - Access their media releases
- Meet vendors
- Engage with board of directors, advisory boards, etc.
- Report on progress to the team and get feedback
- Plan weekly accountability calls with direct reports

Contact Customers

- Visit all clients or customers
- Review customer satisfaction
- Meet any vendors regularly used
- Build rapport with coordinating departments, team, or customers/clients
- Fine-tune ongoing interactions with co-workers
- Schedule first speaker/presentation program
- Plan attendance at relevant tradeshow and industry events

Ongoing

- Join ABC and other appropriate trade associations and organizations
- Continue to report to the team and the board in a timely manner
- Continue to dialog with direct reports
- Study to improve product and industry knowledge
 - Study the competition
 - Study the industry
 - Study the regulator(s)
 - Know the landmines
- Review strategic plan/business plan quarterly
 - Understand metrics
 - Understand challenges
 - Review last quarter results

90
Days

Ongoing Steps

- Continue working with current client or customer base
- Work efficiently and effectively to ensure optimum time management
- Focus on lower-priority products or services to build revenue
- Implement new procedures, techniques, or plans to further long-term goals
- Identify new and creative ways to grow company presence in the industry
- Get input from the board and direct reports
- Raise your visibility in the company, industry, and outside the industry