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**AN EXECUTIVES GUIDE:**  
NAVIGATING THE FIRST  
90 DAYS

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## INTRODUCTION

Embarking on a new executive role is akin to navigating uncharted waters, where the initial 90 days set the tone for a trajectory of success. In this executive guide, we delve into the intricate dynamics of this critical period, providing a roadmap for a seamless onboarding experience that not only establishes a solid foundation but also propels executives towards sustained achievements.

The initial 30 days focus on the core elements of people, culture, and knowledge. Building meaningful connections with direct reports and understanding team dynamics form the bedrock of effective leadership.

As we progress into the first 60 days, the spotlight shifts to people, strategy, and capability. Evaluating the existing strategy, ensuring its alignment with delivery capabilities, and assessing the effectiveness of the business plan becomes paramount.

In the concluding phase of the first 90 days, our focus turns to integration, evolution, and excellence. Cultivating continuous communication and collaboration fosters a cohesive team working towards shared goals.

This guide provides an actionable checklist to facilitate a holistic understanding of the business, foster key relationships, and set clear objectives for the upcoming 90 days.

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We are a leading recruitment firm specialising in working with mid-tier wealth management and advice firms.

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## SECTION 1: FIRST 30 DAYS: PEOPLE, CULTURE, KNOWLEDGE

### **People:**

- Meet with each direct report, fostering connections and understanding team dynamics.
- Initiate discussions across functional lines, aiming to gain a broad appreciation of the business.
- Dive into urgent matters, providing immediate tactical value. Foster open communication channels with team members.

### **Culture:**

- Assess and understand the culture, desired behaviours and business value proposition.
- Take time to appreciate leadership style and culture. Seek to understand how decisions are reached, enhancing collaboration.
- Explore the motivations of employees, gauging their satisfaction and engagement.

### **Knowledge:**

- Review the budget comprehensively, exploring opportunities for strategic financial decisions.
- Analyse the company's financials to grasp key performance indicators.
- Understand the reasons clients choose the company's services, applying insights to strategic decisions.



## SECTION 2: FIRST 60 DAYS: PEOPLE, STRATEGY, CAPABILITY

### Strategy

- Evaluate the effectiveness of the existing strategy, identifying areas for improvement.
- Assess the robustness of the current year's business plan and gather information for the next year.
- Ensure the strategy aligns with the organisation's delivery capabilities for successful implementation.
- Evaluate the robustness of financial systems and processes.

### Capability

- Assess the organisation's effectiveness in meeting tactical goals and
- Evaluate collaboration within the field and identify areas for improvement.
- Solicit feedback from front-line staff and beneficiaries for insights into service delivery, enhancing the client experience.

### People

- Evaluate team cohesion, identifying areas of tension and opportunities for cross-team collaboration.
- Set clear expectations for team members and address any performance issues.
- Assess leadership effectiveness and the overall team culture, recognising that a positive culture contributes to organisational success.





## SECTION 3: FIRST 90 DAYS: INTEGRATION, EVOLUTION, EXCELLENCE

### Integration

- Foster continuous communication and collaboration, ensuring that teams are working cohesively towards shared goals.
- Establish regular feedback mechanisms to gauge the effectiveness of strategies and operations, promoting a culture of continuous improvement.

### Evolution

- Assess the adaptability of existing strategies and begin to consider adjustments based on real-time feedback and changing market dynamics.
- Encourage a culture of innovation, where new ideas are welcomed and explored to drive the organisation towards excellence.

### Excellence

- Conduct a comprehensive review of team and individual performances against set goals, celebrating achievements and addressing areas of improvement.
- Fine-tune the overall strategy based on the insights gained from the initial 90 days, ensuring alignment with the evolving needs of the organisation.





## SECTION 4: CHECKLIST

### Objectives

- ✓ Acquire a holistic understanding of the business.
- ✓ Identify and build relationships with key stakeholders internally.
- ✓ Create clearly defined personal objectives for the next 90 days and beyond.
- ✓ Share a comprehensive analysis of performance in key areas (SWOT).
- ✓ Propose changes with a clear time frame aligned to business priorities.
- ✓ Develop a clear understanding of team capability and create a hiring strategy to realign, upskill or acquire the necessary talent.
- ✓ Assess personal strengths and weaknesses.
- ✓ Action quick win strategies.

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