

WHY CREATE A 30-60-90 DAY PLAN?

CREATE THE PLAN

APPENDIX

Q & A

Patricia C. Borne, Executive Principal

CEO
Resources, Inc.
Corporate • Executive • Organizational

30-60-90 Day Business Plan

**ORGANIZATION
LOGO**

**YOUR
NAME/DATE**

First 30-days: Listen and Learn

Deliverables: Familiarity with organization; get up to speed as quickly as possible

Examine business status and priorities

- Meet with leadership to discuss priorities and expectations
- Identify the “Why” we do what we do. What makes us unique?
- Review expectations of my role/align specific goals for first 90 days
- Identify current business financial status (P&L); pricing/sourcing strategies



First 30-days: Listen and Learn

Deliverables: Familiarity with organization; get up to speed as quickly as possible

Assess the current business status

- Gain understanding of internal operating systems and rhythms
- Identify order to cash process
- Examine current safety practices and compliance with regulations
- Review organizational chart and seek areas for improvement
- Meet with key departmental leaders
- Review current status of deliverables and results



First 30-days: Listen and Learn

Deliverables: Familiarity with organization; get up to speed as quickly as possible

Meet employees collectively and individually

- Learn employees' roles, responsibilities, challenges and opportunities
- Create/maintain environment which fosters employee engagement, empowerment and team building
- Understand what each department needs to be successful
- Attend any needed training



First 60-days: Build Momentum/Clarity

Deliverables: Actionable recommendations based on observations and team/customer feedback

Assess production/distribution/overall company processes

- Become familiar with existing standards required to complete daily orders (or develop as necessary)
- Map processes and identify non-value-added activities to streamline production/provide cost savings
- Oversee initiatives to ensure safety and compliance with industry standards



First 60-days: Build Momentum/Clarity

Deliverables: Actionable recommendations based on observations and team/customer feedback

Initiate relationship development with key customers and vendors

- Analyze and identify which customers produce the highest revenue/profit
- Solicit the current customer experience perspective
- Identify opportunities to expand brand awareness – Chambers/Business Councils/Trade Shows Social media/etc.
- Audit current vendors for potential cost savings
- Organize team meetings and schedule first Team Building – off site



First 60-days: Build Momentum/Clarity

Deliverables: Actionable recommendations based on observations and team/customer feedback

Meet with leadership

- Share observations and preliminary recommendations; ask for help prioritizing
- Obtain feedback and coaching on initial performance
- Review progress on 30 & 60-day plans and be a sounding board for new ideas
- Refresh goals and priorities moving forward



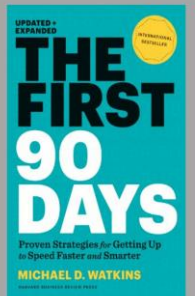
First 90-days: Activate Plans

Deliverables: Begin implementing approved internal recommendations; improve customer experience

Standardize performance reviews/chats/process

- Formalize process to allow employees the ability to understand what constitutes meeting expectations
- Provide sample to employees to allow for common understanding
- Introduce a culture of accountability, mutual respect and fun

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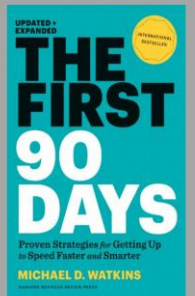
First 90-days: Activate Plans

Deliverables: Begin implementing approved internal recommendations; improve customer *experience*

Draft recommendations

- Formulate and implement plans within company guidelines to achieve productivity, efficiency and excellent customer service
- Identify common template and owner of each department to review current processes and develop future improvements

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First 90-days: Activate Plans

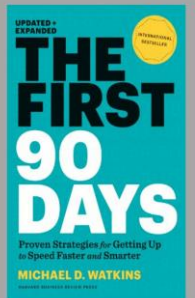
Deliverables: Begin implementing approved internal recommendations; improve customer experience

Continuous evaluation and improvement

- Identify activities to start/stop/improve; implement accountability guidelines
- Design efficient organizational structure which provides growth opportunities and avenues of succession
- Initiate environment promoting goal attainment through management and coaching skills

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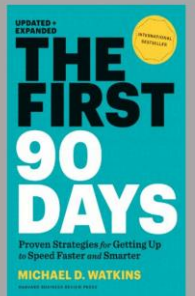
First 90-days: Activate Plans

Deliverables: Begin implementing approved internal recommendations; improve customer experience

Meet with leadership

- Obtain feedback; discuss observations, successes and opportunities
- Review results to-date against revenue and profit goals by team
- Provide employee and customer feedback and seek approval for suggested improvements

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APPENDIX

SUMMARY BIOGRAPHY

SKILLS NEEDED/MY QUALIFICATIONS

RECOMMENDATIONS

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