LEADERS IN TRANSITION · ONBOARDING

The First 90 Days — and the First Year

The first 365 days of a leadership tenure are an unmatched opportunity to shape both your legacy and the company's trajectory. This is a four-phase, research-backed roadmap — lay the groundwork before Day 1, listen and learn through Day 90, refine strategy and team in Months 3–6, and execute and consolidate in Months 6–12.

Adapted with credit from Derek Lusk's "A CEO's First 365 Days: A Research-Driven Transition Roadmap."

The roadmap at a glance

Phase 0 — Lay the groundwork (before Day 1). **Phase 1** — Listen, learn, set the vision (Day 1–90). **Phase 2** — Refine strategy and build the team (Months 3–6). **Phase 3** — Execute, innovate, consolidate (Months 6–12).

Phase 0 · Lay the groundwork (before Day 1)

Confirm the mandate. Schedule in-depth conversations with the board and incoming leadership team to surface implicit expectations about growth, margins, and pace of change. Misreading the board's mandate is a leading cause of early struggle (Porter, Lorsch & Nohria, 2004).

Invest in personal readiness. Leaders who take a short sabbatical or digital detox immediately before starting report a 30% higher sense of well-being in month one (Dewar et al., 2022). Treat the pause as an investment in resilience.

Define your signature contribution. Before diving into the day-to-day, write a concise signature-contribution statement linking your personal mission to the company's value to society: Who benefits? What value will you uniquely deliver? Why does it matter, and why now?

Plan the first week. Beyond one-on-ones, plan an all-hands kickoff and informal site walkthroughs. Visible, in-person engagement is the fastest way to signal approachability (Watkins, 2013). Open-ended questions like "What are our biggest obstacles?" surface problems for later phases.

Phase 1 · Day 1–90 — Listen, learn, set the vision

Run a listening tour. Spend the first ninety days absorbing reality rather than issuing directives. Span all levels: one-on-ones with senior leaders, skip-levels with frontline teams, roundtables across finance, operations, sales. Employees are most candid in the first sixty days (Byford et al., 2017). Meet top customers, suppliers, and partners.

Read culture and morale. Use confidential pulse surveys to quantify sentiment by region and function. Map stated versus lived values before attempting major change (Porter et al., 2004).

Immerse in operations. Review key KPIs, identify urgent issues, and resist knee-jerk fixes until root causes are validated (Watkins, 2013). Within ~30 days, hold a town hall to share initial findings and a draft 100-day action plan (Byford et al., 2017).

Bank early quick wins. One or two high-impact, feasible improvements create visible momentum (Birshan et al., 2017). In parallel, begin shaping a three-to-five-year strategic narrative and invite the executive team's feedback.

Phase 2 · Months 3–6 — Refine strategy, build the team

Distil two or three pillars. CEOs who articulate clear, focused priorities outperform peers by 4%+ when taking over underperformers (Birshan et al., 2017). Validate them in off-sites to create shared ownership.

Formalize the roadmap. Build a six-to-eighteen-month roadmap with specific goals and progress measures; present it to the board in months 4–6.

Move on talent. Assess the top 20–30 leaders using performance data and direct observation. Around 66% of CEOs later regret not moving faster on team changes (Favaro, Karlsson & Neilson, 2012) — decide early.

Engage the broader workforce. Launch people-centered initiatives aligned to the culture you want (Byford et al., 2017). Around month six, a second town hall communicates early wins; keep a disciplined cadence of board and stakeholder updates (Wiggins & Davies, 2024).

Phase 3 · Months 6–12 — Execute, innovate, consolidate

Set an execution cadence. Establish a strategic-review rhythm (e.g. quarterly executive meetings). CEOs who activate multiple strategic levers early see amplified gains (Birshan et al., 2017).

Reinforce culture. Sustain longer-term initiatives and publicly recognize behaviors that exemplify your values. Culture change relies on visible, consistent action from the top (Porter et al., 2004).

Consolidate the team and delegate. Solidify top-team effectiveness; develop the next tier. Adopt a systems mindset — delegate lower-level work and focus on CEO-specific responsibilities (M&A, major partnerships, industry representation). Top CEOs spend 60%+ of their calendar on high-impact activity (Dewar et al., 2022).

Close the year transparently. A one-year town hall or memo thanks teams, showcases year-one achievements, and previews year two (Byford et al., 2017). A board retrospective with a year-two outlook reinforces accountability (Wiggins & Davies, 2024).

References

Birshan, Smet & Tesvic (2017), *New CEO? Plan your first moves carefully*, McKinsey. · Byford, Watkins & Triantogiannis (2017), *Onboarding Isn't Enough*, HBR. · Dewar, Keller, Malhotra & Strovink (2022), *Starting Strong*, McKinsey. · Favaro, Karlsson & Neilson (2012), *Navigating the First Year*, Strategy+Business. · Porter, Lorsch & Nohria (2004), *Seven Surprises for New CEOs*, HBR. · Watkins (2013), *The First 90 Days*, HBR Press. · Wiggins & Davies (2024), *The New CEO*, Gulf Business. Roadmap adapted from Derek Lusk, *A CEO's First 365 Days*.

Stepping into a new leadership seat? Phase 3 Search supports leaders well beyond the placement — including the first-year transition. If you're moving into a new role, let's talk about making it land. **Talk to Phase 3 → ph3.bio/contact**

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