

Deep Dive Checklist

To be received >30 days prior to start date

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|-----------|--|--------------------------|
| 1 | <i>Financials - 5 yrs, quarterly, by company & consolidated.</i> | <input type="checkbox"/> |
| 2 | <i>Functional KPIs - Your direct area plus peers.</i> | <input type="checkbox"/> |
| 3 | <i>People Insights - 3 yrs performance reviews for your team, Psychometric data, People KPIs</i> | <input type="checkbox"/> |
| 4 | <i>Strategy - Current & Historic decks / presentations</i> | <input type="checkbox"/> |
| 5 | <i>Planning Documents - Current year and next year</i> | <input type="checkbox"/> |
| 6 | <i>Partners / Key Suppliers - Performance, history, dependancy, concentrations</i> | <input type="checkbox"/> |
| 7 | <i>Stakeholders - Regulators, media, gov't, advocacy groups</i> | <input type="checkbox"/> |
| 8 | <i>Customer Research - NPS, Retention, Repeat purchase, Customer feedback, segmentation, complaints</i> | <input type="checkbox"/> |
| 9 | <i>Role Specific - insights behind why you were hired & the problems to solve.</i> | <input type="checkbox"/> |
| 10 | <i>Personality Profiles - Key People (direct reports, peers, Board members), History, values, drivers, interests.</i> | <input type="checkbox"/> |
| 11 | <div style="border: 1px solid black; padding: 5px; display: inline-block;"><i>Anything Else</i></div> | <input type="checkbox"/> |

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