



30/60/90 Day Action Plan For Success

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30 Day Plan

- Attend and complete company training on market strategy, company processes, and products and services.
- Master relevant subject matter.
 - AZ900 Azure Fundamentals
 - Microsoft 365 Fundamentals
 - MB210 Microsoft Dynamics 365 for Sales
- Learn corporate systems – procedures for paperwork, reports, e-mail.
- Orientation – meet management, co-workers, support departments. Learn company culture.
- Meet with supervisor/manager to prioritize what is expected of me, within 90 days.
- Identify top priorities:
 - Top 10 products/clients/services currently.
 - Identify “problem” issues or most “at risk” areas.
 - Top 10 products/clients/services by potential.
 - Top competitive companies
 - Use the “80/20 Rule” to evaluate processes, product success, or services.
- Contact all current customers or clients by letter or e-mail to introduce myself.
- Use 80/20 Rule to identify top customers or clients. Visit as many top revenue-generating clients or customers as possible.
- Meet any vendors regularly used.
- Report on progress to manager and get feedback.
- Find a mentor who is successful in this role and can pass on valuable suggestions about best practices.
- Learn from other peers in this position to see how they operate.

Additional Certification / learning complete within first 30 days:

- CompTIA Project+
- ITIL® Foundation Certification (AXELOS)

60-Day Plan

- Continue any necessary company training.
- Build relationship with all clients or customers.
- Review customer satisfaction and continue to monitor potential issues.
- Use 80/20 Rule to identify top revenue-generating activities.
- Continue to monitor “problem” or “at-risk” areas actively looking for places to make improvements.
- Compare company’s products / services with competitors to determine areas of weakness and identify possible improvements.
- Compare / Contrast marketing efforts with competitors to determine areas with room to improve.
- Visit other divisions/departments to learn relationships.
- Develop a network within the organization.
- Build rapport with coordinating departments, or teams.
- Fine-tune ongoing interactions with co-workers.
- Identify people who do their jobs well and ask to do “a day in the life” with them to see what works.
- Use 80/20 Rule to begin evaluating task and time management.
- Organize daily schedule for optimum efficiency.
- Streamline procedures for better efficiency.
- Examine daily operational cost control procedures.
- Join appropriate professional associations/organizations.
- Discuss observations / plans with mentor(s).
- Study to improve job performance.
 - Dale Carnegie Sales Training: Winning with Relationship Selling
- Continue to turn in paperwork and reports in a timely manner.
- Continue to dialog with supervisor/manager for performance feedback.

90-Day Plan

- Continue working with current client or customer base. Be visible.
- Consider new and creative ways to connect with current customers/clients.
- Work efficiently and effectively to ensure optimum time management, based on evaluation using the 80/20 Rule.
- Fine-tune schedule.
- Begin using 80/20 Rule to examine and evaluate suppliers, inventory, or procedures.
- Focus on lower-priority products or services to build revenue.
- Evaluate progress toward quarterly goal.
- Compare your department, division or group's performance and identify successes and failures as compared to others on the same level.
- Implement new procedures, techniques, or plans to further long-term goals.
- Evaluate client's position in the market using a SWOT Analysis (Strengths, Weaknesses, Obstacles, Threats).
- Come up with new and creative ways to grow client presence in the industry. Get input from team and manager.
- Actively participate in team meetings.
- Offer to take on any special projects for the team. Become the "go-to" person.
- Study Best Practices within your industry and begin implementing ideas.
- Create checklists for routine duties.
- Based on information gathered in first 60 days, develop strategies designed to defend against competitive threats, product issues or failures.
- Based on information gathered in first 60 days, develop strategies to improve efficiency.
- Based on information gathered in first 60 days, develop strategies to generate revenue.
- Continue study to improve job performance using resources from within and from outside the company.
- Meet with mentor to discuss progress/goals.
- Review first 90 days with supervisor/manager to discuss performance.
- Establish long-term business plan.

Additional Certification / learning complete within first 90 days:

- Harvard Business School Online - Negotiation Mastery
- Prosci® Change Management Certification
- Project Management Professional (PMI)