

# CONGRATULATIONS

## On-Boarding

### New Hire 90-Day Success Plan

#### **On-boarding Goals:**

- **Thank those who were valuable to your job search**
- **Announce your new position**
- **Form a partnership with your new boss**
- **Build your internal network**
- **Track your performance**
- **Write a Development Plan with specific measures of success**

**“The President of the United States gets 100 days to prove himself; you get 90”, according to Michael Watkins, author of “The First 90 Days: Critical Strategies for New Leaders at all Levels.” According to Dan Ciampa, Consultant, almost 64% of executives hired from the outside don’t succeed in their new jobs because they underestimate the challenges, culture and politics of a company.**

Your first 90 days on the job are critical to your success. According to Peter Gonye, Co-head of a search firm, “In all cases they expect you to hit the ground running and ignoring or misreading the cultural cues can permanently sabotage ‘the image profile you seek to cast’”.

With this in mind, here’s a document developed for your first 90 days at your new job to help you.

- Identify actions to take after accepting an offer, as you begin your new job and for ongoing career management.

## **PART I: HOW TO CLOSE OFF YOUR JOB SEARCH**

Here are some of the tasks to do as soon as possible after accepting a new position:

- Write a brief thank you landing letter to the people in your career contact network, informing them about your new position. Be sure to include what role they played in helping you succeed. (See example on p. 8)
- Send a brief update to others you have met along the way.
- Notify anyone who may be considering you for a job; acknowledge their interest and thank them for their consideration.
- Organize and keep your notes from your job search. This should also include the various options you explored and the choice you have made. As you move forward, keep notes about your accomplishments, important decisions you make and new skills you’ve learned. This will help you later as you market yourself inside your new company.
- Keep your network alive and well. Once you have your new business cards, send them out to the people in your network along with a brief note.
- Don’t forget to keep your life balanced. The lessons you learned while looking for a new job are important. Have fun; take time for yourself, your family and your friends; develop new skills; stay active and engaged outside of work.
- Maintain healthy empathy for others in transition.
- Building good relationships is important in making a successful transition.
- Knowing and managing yourself are central to being effective in a new job.
- Set your professional goals and review them each week.

According to Michael Watkins, there are **10 keys to success** in your first 90 days and beyond.

### **They are:**

1. Promote yourself: Look forward not backward. What made you successful in your old job may not be the same in your new job. Look for new creative ways to perform tasks/projects presented to you.
2. Accelerate your learning: You need to navigate the organization's learning curve as quickly as possible.
3. Match strategy to situation.
4. Secure early successes: These build credibility and generate momentum. In this first 90 days you will need to identify ways to create value and improve business results within the scope of your position.
5. Negotiate success: Manage Company's expectations of you and build positive working relationships by careful planning and verbal interaction.
6. Achieve alignment: You may be called upon to play the role of "organizational architect". This means looking at and analyzing the company's strategy, developing systems and skill bases to realize this strategic direction.
7. Build your team.
8. Create coalitions both internal and external.
9. Keep your balance in check between your personal life and your professional life.
10. Act as a mentor helping people in the company and your department in moving their career forward.

### **Additionally:**

1. Learn the organization's long and short-term strategies and goals.
2. Learn who the major players are in the company.
3. Learn the industry and company language.
4. Look for ways the company has embraced change.
5. Learn who makes the tough decisions.
6. How is performance measured? What tools are used, if any (360°)?
7. Learn what performance expectations your manager has for you and in what time frame.
8. How does your manager wish to receive information/communication from you?
9. When is the first performance evaluation completed? 3 months? 6 months? 9 months? 1 year?
10. Learn about the culture and unspoken politics of the organization.
11. Listen well.
12. Write effectively.
13. Manage your time.
14. Be a problem solver.
15. Ask if you don't know.
16. Keep an open door policy for all who need your attention.

## LANDING LETTER

**Roger Cohen**

477 Dewitt Avenue  
Syracuse, NY 15728

(Date)

Jeanne Baird  
Vice President  
The Upstate Consulting Group  
7745 S. Colvin Avenue  
Syracuse, NY 15728

Dear Jeanne:

### **Introduction and Position Announcement**

I wanted you to know that I have recently accepted a position as an Assistant Manager of Accounting Services with Garry Corporation here in Syracuse. My new address is: One Onondaga Center, Suite 300, Syracuse, NY 15728. My phone number is: (315) 555-1224. I have enclosed my business card for you as well.

### **Appreciation**

Jeanne, I want you to know how much I appreciated your guidance during my exploration of new career opportunities. Your counsel and assistance were invaluable.

### **Scope and Challenge of New Position**

In my new role, I will be in charge of all accounting and audit operations, including financial reporting, billing, accounts receivable, accounts payable, capital project accounting, and internal controls. I am most excited about the opportunity I have to significantly upgrade the automated systems in the accounting departments so that the information systems are fully integrated for reporting and tracking purposes.

### **Thank you**

Thanks for your help and interest in me, and particularly for your time and consideration in putting me in touch with some excellent people. Your support was very helpful in making my decision.

I look forward to staying in touch with you.

Sincerely,

Roger

## SELF MANAGING YOUR CAREER: CAREER AGILITY

There are four categories of actions you can take to insure career agility while you manage your career:

- I. Form a partnership with your manager
- II. Track your performance (Significant Event Log)
- III. Create an Individual Development Plan: 30/60/90 day plan
- IV. Network with co-workers

### I. Form a Partnership With Your Manager

A. Within the first week, meet with your manager to clarify expectations. To do this, ask your manager to make two lists before your discussion:

- What you can expect of me as your manager.
- What I would like from you as my employee.

You should write a list of the following:

- What you (manager) can expect of me as your employee.
- What I would like from you as my manager.

When you meet, share your lists verbally. You will see where you match each other and also discuss and resolve any differences. Understand that this may be a new exercise for your manager!

- B. Seek responsibility and volunteer for cross-training on other jobs and special assignments, especially those that put you in contact with co-workers from other departments in the organization. This broadens your understanding of the company as a whole.
- C. An easy yet effective agenda for quarterly progress reviews with your manager is "START-STOP-CONTINUE." What should you start doing? What should you stop doing? And what should you continue doing? It's concise, and will keep you on the right track.
- D. Sign up for training, coaching, projects, or task forces to get broad company experience. Ask about what opportunities are available, and speak up if you have a desire to become involved in some activity.
- E. Find out from your manager how you can be most valuable to him/her in achieving the goals for your team, and then focus your efforts on delivering against those priorities.
- F. Keep a running list of key topics to review with your manager either in a planner or PDA so it's easily retrievable.

## II. TRACKING YOUR PERFORMANCE

- A. Keep track of your performance on a **Significant Event Log**. (See sample attached.) It will assist you in preparing for quarterly performance reviews by providing details on your accomplishments, specific situations you handled well, and those that were learning experiences for you. Your manager should also have notes about your performance. Together you will put together a complete and accurate picture of your performance, so there will be NO surprises.
  
- B. Use your quarterly and annual performance reviews to summarize your performance and accomplishments and to identify your areas for development. (If your manager does not initiate quarterly review meetings, take the initiative and schedule a 30 minute meeting, outlining what you would like to discuss and get feedback on.)
  
- C. Write up a draft of an **Individual Development Plan** for yourself and discuss and modify it with your manager during the meeting. Include personal goals, and professional development plans. (See sample attached.)

## THE SIGNIFICANT EVENT LOG

It's important to track your own performance. Place the following kinds of information in a file you keep for yourself:

- Copies of complimentary letters from customers, co-workers, etc.
  - Any recognition awards.
  - Productivity reports.
  - Copies of corrective action memos and actions taken, issues resolved.
- NOTE: Your weekly status report will help to keep track of your accomplishments.

You also want to capture positive and corrective feedback given to you. The **Significant Event Log** can be used to note important incidents that, when viewed over an entire review period, provide an accurate picture of your performance.

For example, if you have just received a compliment from your customer (internal or external) about the way you handled a difficult request, you would inform your manager if he/she is not aware of it, and then document the incident on your Significant Event Log.

<b>Date:</b>	<b>Description of Event / Incident:</b>
8/7	<p><b>Challenge:</b> <i>Mr. Holmes called to ask about the status of his mortgage application. He was distressed and very confused about some information he read in the paper.</i></p> <p><b>Action:</b> <i>I successfully calmed him down. I told him I understood how waiting for a decision on something as important as a mortgage could be difficult. I updated him about his loan status and also acknowledged that we had received the bank verifications that we had requested.</i></p> <p><b>Result:</b> <i>He eventually asked all of the questions in the article that made him concerned and was in a positive mood by the end of the call.</i></p>

Remember to:

- Record events daily, before you forget the details.
- Keep the Log handy, not buried in a drawer.
- Record specific situations.
- Include both compliments and the mistakes from which you have learned.

### **III. CREATE AN INDIVIDUAL DEVELOPMENT PLAN: Establish your development goals (Your 30/60/90 day plan):**

For an example, see the page after this section. Once you create it, get your manager's agreement on it and take responsibility for accomplishing what is in your plan. Don't blame your manager or other outside influences for not achieving what is important to you.

### **IV. NETWORK WITH CO-WORKERS:**

Broaden your scope beyond just your job!

- A.** Learn about other departments and jobs in the organization.
- B.** Volunteer for task forces, work groups, and project teams. Give people outside your department a chance to know you and what you can contribute.
- C.** Ask others questions about information regarding jobs or departments, informally or formally.
- D.** Ask others you respect for feedback to help clarify your skills and talents and how you might best contribute to the organization.
- E.** Participate in staff and all-employee events. Use these occasions as opportunities to meet other co-workers you don't know.
- F.** Seek out someone you know who is more experienced at your company to serve as a mentor to you. Use them as a source of feedback, a resource for information about the workings of the organization, and to provide sponsorship to help you progress.
- G.** Maintain your outside network including colleagues, recruiters and professional groups. This will keep you abreast of the latest happenings in your field and keep you in touch with others that can contribute to your success.



## PART II: CHECK LIST FOR YOUR FIRST 90 DAYS

There are many things that you will need to think about and know before you start your new job and during your first 90 days. Use this list as a starting point, choosing the most important information you need.

- Announcement of your appointment to the job
- Business cards
- Computer operation, security, software, log in information
- Phone system operation
- Voice mail operations
- Office and desk supplies ordering procedures
- Company employee directory
- HR Director and Manager
- Mail procedures
- Physical layout of floor, departmental locations in building(s)
- Who to contact when something needs fixing: work orders, troubleshooting
- Lunch routine
- Learn "kitchen etiquette", making coffee, cleanup
- Travel and expense report procedures
- Access to public transportation, parking
- Access to building, floor during off hours
- Emergency procedures

### Personal checklist

- Introduce yourself to others.
- Take time to analyze and understand your new environment.
- Pay attention to the "grapevine" but don't contribute to it.
- Dress code, if any.
- Follow up on benefits and get specific information making certain all is in place.
- Leave old employer behind; avoid voicing your opinions in a **critical way** comparing your former employer with your new company.
- Be observant of interpersonal dynamics.
- Obtain a copy of the Organization chart.
- Organize workstation/office.
- Participate in company-wide/departmental events.
- Read back issues of company newsletters and publications if available.
- Appropriately show your sense of humor
- Take the initiative, but don't take over.
- Vacation request policy
- HR Manual if not already in hand.
- \_\_\_\_\_
- \_\_\_\_\_

**INDIVIDUAL DEVELOPMENT PLAN FOR \_\_\_\_\_ DATE: \_\_\_\_\_**

<b>DEVELOPMENTAL OBJECTIVE</b>	<b>ACTION STEPS</b>	<b>RESOURCES NEEDED/COST</b>	<b>TARGET DATES</b>	<b>MEASUREMENT OF SUCCESSFUL ACCOMPLISHMENT</b>
<p><i>What you need to learn or develop competence in to move toward job/career goals.</i></p>	<ul style="list-style-type: none"> <li>• <i>State each step specifically and behaviorally (what you will <u>do</u> to accomplish the objective?)</i></li> <li>• <i>Consider more than just seminars that cost money. What other activities can you do to learn and develop the competence needed to accomplish this objective?</i></li> </ul>	<ul style="list-style-type: none"> <li>• <i>Consider:</i></li> <li>• <i>Assistance needed from others (name specific people)</i></li> <li>• <i>Time needed to be allocated to do activities</i></li> <li>• <i>Monetary cost (if applicable)</i></li> <li>• <i>Information needed</i></li> </ul>	<p><i>Include realistic dates for completion of each step as well as entire objective. Breaking the objective down into small, doable steps with dates attached will help structure the activities and build momentum toward the goal.</i></p>	<p><i>How will both you and your manager know you have successfully completed this objective? Describe outcome in specific, observable terms.</i></p>

**INDIVIDUAL DEVELOPMENT PLAN FOR (NAME)**

**DATE:** \_\_\_\_\_

<b>DEVELOPMENTAL OBJECTIVE</b>	<b>ACTION STEPS</b>	<b>RESOURCES NEEDED/COST</b>	<b>TARGET DATES</b>	<b>MEASUREMENT OF SUCCESSFUL ACCOMPLISHMENT</b>
<p><i>Develop competency in training others on job procedures.</i></p>	<p><i>Talk with H. Donaldson about how he goes about training his staff.</i></p> <p><i>Select one book on training employees from the library to read and discuss what I learned with manager.</i></p>	<p><i>Time with H. Donaldson</i></p> <p><i>Time with manager</i></p>	<p><i>Oct. 3</i></p> <p><i>Oct. 15</i></p>	<p><i>Meeting completed. List compiled of effective training tips.</i></p> <p><i>Meeting completed.</i></p>
	<p><i>Identify a job procedure that the staff could use a 30 minute refresher training session on, develop a presentation and practice activities, and conduct training for them. Develop a quiz and evaluation to provide feedback on how well they learned and how well I taught.</i></p>	<p><i>Help from manager and co-workers to identify procedure</i></p>	<p><i>Oct. 15</i></p> <p><i>Oct. 18</i></p>	<p><i>Procedure identified</i></p> <p><i>Conversations completed</i></p>
		<p><i>Time to talk with co-workers on what they would specifically like to have reviewed in training</i></p>	<p><i>Nov. 5</i></p>	<p><i>Presentation developed; manager OKs materials.</i></p>
		<p><i>Time to develop presentation, handouts, quiz and evaluation</i></p>	<p><i>Nov. 8</i></p>	<p><i>Training conducted.</i></p>
		<p><i>Check out seminars or courses at local community college on training and enroll in one.</i></p>	<p><i>Tuition costs</i></p> <p><i>Time commitment</i></p>	<p><i>Nov. 15</i></p> <p><i>Dec. 15</i></p>

**INDIVIDUAL DEVELOPMENT PLAN**

<b>DEVELOPMENTAL OBJECTIVE</b>	<b>ACTION STEPS</b>	<b>RESOURCES NEEDED / COST</b>	<b>TARGET DATES</b>	<b>MEASUREMENT OF SUCCESS</b>

**INDIVIDUAL DEVELOPMENT PLAN**

<b>DEVELOPMENTAL OBJECTIVE</b>	<b>ACTION STEPS</b>	<b>RESOURCES NEEDED / COST</b>	<b>TARGET DATES</b>	<b>MEASUREMENT OF SUCCESS</b>