

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

Perceptions form from the very beginning. Schedule in-depth conversations with the board and the incoming leadership team to surface implicit expectations about growth, margins, and the pace of change. Misreading the board's mandate is a leading cause of early struggle (Porter, Lorsch & Nohria, 2004); explicitly confirming 'what the company needs from me' gets CEO and board speaking the same language from Day 1.

Invest in personal readiness

Stepping in demands peak energy amid nonstop, unfamiliar demands. 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, not a luxury.

Define your signature contribution

The best modern executives are meaning-makers. Before diving into the day-to-day, write a concise signature-contribution statement linking your personal mission to the company's value to society. Answer three questions:

- Who benefits?
- What value will you uniquely deliver?
- Why does it matter, and why now?

Plan the first week

Beyond one-on-ones with direct reports, plan an all-hands kickoff and informal walkthroughs of key sites. Visible, in-person engagement is the fastest way to signal approachability and invite honest feedback (Watkins, 2013). Open-ended questions like ‘What are our biggest obstacles?’ surface problems and opportunities 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, and roundtables across finance, operations, and sales. Employees are most candid in the first sixty days (Byford et al., 2017). Meet top customers, suppliers, and partners to learn your reputational strengths and weaknesses.

Read culture and morale

Use confidential pulse surveys to quantify sentiment by region and function: high-morale pockets are cultural beacons; low-morale areas warrant root-cause analysis. Map stated versus lived values, and compare them against your leadership principles and signature contribution, 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 — it builds transparency and trust (Byford et al., 2017).

Bank early quick wins

One or two high-impact, feasible improvements (e.g. streamlining an outdated process) create visible momentum that fuels larger initiatives (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

By month three the knowledge base is deep enough to act. Distil priorities into two or three overarching pillars for Year 1. 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, initiatives, and progress measures; present it to the board in months 4–6 to demonstrate evidence-based confidence and secure resources.

Move on talent

Assess the top 20–30 leaders using performance data, prior evaluations, 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 — leadership development, retention incentives, recognition — aligned to the culture you want (Byford et al., 2017). Around month six, a second town hall communicates early wins and reaffirms priorities; keep a disciplined cadence of board and stakeholder updates, asking customers ‘What should we start, stop, and continue?’ (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) to track progress. CEOs who activate multiple strategic levers early see amplified gains (Birshan et al., 2017). Shape operating rhythms to your style — stand-ups, site visits, or other engagement.

Reinforce culture

Sustain longer-term initiatives — partnerships, mentoring cohorts, innovation challenges — and publicly recognize behaviors that exemplify your values. Culture change relies on visible, consistent action from the top and from aligned culture catalysts (Porter et al., 2004).

Consolidate the team and delegate

Solidify top-team effectiveness through reviews, alignment sessions, and clear accountability; 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 and shared vision (Wiggins & Davies, 2024) — so year two starts aligned.

REFERENCES

Birshan, Smet & Tesvic (2017), *New CEO? Plan your first moves carefully*, McKinsey & Company. · Byford, Watkins & Triantogiannis (2017), *Onboarding Isn't Enough*, Harvard Business Review. · Dewar, Keller, Malhotra & Strovink (2022), *Starting Strong*, McKinsey & Company. · Favaro, Karlsson & Neilson (2012), *Navigating the First Year*, Strategy+Business. · Porter, Lorsch & Nohria (2004), *Seven Surprises for New CEOs*, Harvard Business Review. · 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?

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