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**30/60/90 DAY PLAN FOR SUCCESS [marketing/sales role]**

Prepared by: Your Name

Prepared for: Mr Alloy Hollys, Hiring Manager, XYZ Company

Date: Date/Month/Year

**30-DAY PLAN**

• Attend and complete company training on sales strategy, processes, and products.

o Company Orientation 101” (whatever it’s called in that company).

• Get up to speed on company-specific software (if you can name this, do so).

• Learn the company’s corporate systems – procedures for paperwork, reports, and e-mail.

o (If you can, identify these systems by name.)

• Learn corporate project management system.

• Set up email and voicemail accounts.

• Organize office and projects.

• Orientation – Meet management, co-workers, and support departments (advertising, graphic design, operations,

etc.). Learn company culture.

• Meet with each team member to discover strengths and establish relationships.

• Meet with supervisor (insert name here) to prioritize what is expected of me, within

(insert a specified time frame here).

• Identify top goals to be achieved in the first three months.

• Identify competitors, their offerings, and strategies.

o (Identify a few primary competitors here and note that you will complete an in-depth comparison and

analysis of all competitors.)

• Identify and evaluate marketing strategy related to top opportunities:

o Top 10 clients and products currently. (What works?)

• (Try to use specific names here.)

o Top 10 products not marketed effectively.

• (In your pre-interview study of the company, you might notice weak spots that you have ideas for shoring

up.)

o Top 10 clients and products by potential.

• (What clients and products are ripe opportunities for this company?)

o Top bundling opportunities.

• Use the “80/20 Rule” to define products generating the most revenue.

• Use the “80/20 Rule” to define products with the most significant number of issues.

• Use the “80/20 Rule” as it defines products with the most significant potential for growth.

• Use a SWOT Analysis to evaluate company objectives and strategic product plans.

• Contact all current facilities, vendors, and distributors by letter or e-mail to introduce yourself.

• Visit as many product-relevant facilities as possible.

• Visit the Top 10 Clients to get feedback and understand issues.

• Search for peers in this position to learn from (best practices).

• Find a mentor who is successful in this role and can pass on valuable

• suggestions about best practices.

• Find a technical coach who can explain new technology.

• Report on progress to supervisor and get feedback

**60-DAY PLAN**

• Continue any necessary company training.

• Meet with supervisor to prioritize projects.

• Develop/keep flowcharts of marketing plans.

• Build relationships with all clients.

• Review client satisfaction to identify the most significant issues.

• Study to improve industry knowledge, product placement, and strategy.

o (Identity books you might read or specific educational/training programs you might attend.)

• Visit all product-relevant facilities that I’m involved in.

• Initiate first market research study and analyze findings.

• Use the 80/20 Rule to identify top revenue-generating activities.

o (Identity areas to apply more resources, based on the success of previously

identified activities.)

o (Re-evaluate activities that are not providing a necessary outcome and consider

eliminating them.)

• Continue to monitor weak spots in promotional campaigns to determine possible improvements.

• Compare and contrast marketing efforts with competitors to determine areas to improve.

• Continue to conduct market research to determine requirements for existing products.

• Continue analysis of customer research and current market conditions as they apply to my promotional campaigns.

• Continue to study the effectiveness of current marketing plans for top products.

• Develop appropriate marketing plans for top products by potential.

• Visit other departments within the organization to learn about relationships.

• Develop a network within the organization.

• Build rapport with team members.

• Gain an understanding of team members’ strengths and weaknesses.

• Identify someone exceptional at their job and ask to do “a day in the life” with them to see what works.

• Use the 80/20 Rule to begin evaluating time management.

• Organize daily schedule for optimum efficiency.

• Continue to practice my presentations.

• Plan attendance at a relevant tradeshow/industry event.

o (Name specific events.)

• Join appropriate associations/organizations.

o (Name specific organizations.)

• Develop a relationship with a mentor.

• Discuss observations and plans with a mentor.

• Continue to turn in paperwork and reports promptly.

• Continue to dialogue with the supervisor for performance feedback

**90-DAY PLAN**

• Continue working with clients on product strategy. Be visible.

• Continue to study to improve marketing skills, product knowledge, and strategy.

• Plan and implement customer relations programs to strengthen the current customer base.

• Develop appropriate campaigns to support new product launches.

• Work on brand positioning to get the most market exposure.

• Continue to monitor current product campaigns for optimum effectiveness.

• Continue to analyze competing products and services regarding strengths and weaknesses.

• Begin using the 80/20 Rule to evaluate suppliers and procedures.

• Begin using the 80/20 Rule to evaluate staff performance (if in management).

• Continue to work efficiently and effectively to ensure optimum time management based on previous

evaluations using the 80/20 Rule.

• Fine-tune the schedule.

• Focus on lower-priority products to discover undeveloped opportunities and build revenue.

• Come up with new and creative ways to get prospective clients’ attention in the field. Get input from the team and manager.

• Develop strategies for products and services in the pipeline.

• Participate in team meetings.

o (Seek out areas where you can provide unique skill sets or valuable leadership to the team.)

• Offer to take on any special projects for the team. Become the “go-to” person.

• Evaluate the efficiency of recent team meetings and suggest areas for improvement.

• Evaluate progress toward quarterly goals.

• Create checklists for routine duties.

• Evaluate current suppliers and vendors and choose necessary replacements.

• Establish long-term strategic plans for assigned clients.

• Evaluate the company’s position in the market using a SWOT Analysis (Strengths, Weaknesses, Obstacles,

Threats).

• Based on information from the field, product management, and my management, develop strategies

to defend against competitive threats, product issues, or failures.

• Based on information gathered in the first 60 days, develop strategies to improve efficiency.

• Based on information gathered in the first 60 days, develop strategies to generate revenue.

• Study Best Practices within Marketing to develop and implement new ideas.

• Come up with new and creative ways to grow the company’s presence in the industry.

• Continue to dialogue with a mentor to develop a strategy for growth.

• Review the first 90 days with the supervisor/manager to discuss performance.

• Establish a long-term plan for growth

**30/60/90 DAY ACTION PLAN [medical technologist role]**

Prepared by: Silas Enterprise Tech

Prepared for: Dominos Hiring Manager, XYZ Company

Date: Date/Month/Year

**30-DAY GOALS**

• Complete all company training (if possible, name training here).

• Learn as much as possible about corporate policies and company culture by reading company manuals and websites.

• Gain as much technical knowledge as possible about equipment and techniques through reading the

company manuals and website.

• Learn database systems used by the company (if possible, identify this by name here).

• Complete all paperwork and administrative items.

• Supplement any technical knowledge

• Identify essential functions I’ll be responsible for.

• Identify critical equipment I’ll be using and responsible for.

• Meet with the supervisor to establish primary task responsibilities.

• Identify possible pitfalls in task completion.

• Establish relationships with lab techs and assistants (co-workers).

• Learn as much as possible about company culture by meeting with co-workers.

• Identity outside departments I will be interacting with.

• Meet with key contacts in coordinating departments.

• Establish a network within the company.

• Identify possibilities for a mentor in the lab.

• Attend all critical meetings and complete those items that are required.

• Meet with supervisor for feedback.

**60-DAY GOALS**

• Continue any necessary company training.

• Deepen technical understanding of equipment within the laboratory.

• Further understanding of processes and regulations in the lab.

• Continue to understand my role in the lab.

• Continue self-study of science and technology in the broader field that affects my job.

• Continue to perform tasks promptly.

• Learn from peers who are successful in this role.

• If possible, ask to job-shadow a top performer in this role for one day.

• Build relationships among co-workers.

• Establish me as a resource or consultant with new employees.

• Build rapport with outside / coordinating departments.

• Use the 80/20 Rule to evaluate time and task management.

• Review task performance in the first 30 days and evaluate how to improve.

• Monitor problem areas to make improvements.

• Organize daily schedule for optimum efficiency.

• If possible, streamline procedures for better efficiency.

• Meet with a mentor within the lab to discuss progress.

• Identify possibilities for mentors in management.

• Meet with supervisor for feedback.

• Work with the supervisor to identify the most significant challenges in the lab and discuss how I can help.

• Set goals for the next 30 days.

**90-DAY GOALS**

• Cross-train equipment in the laboratory.

• Continue self-education to improve continually.

• Look critically at my performance and how it can be better.

• Examine processes or equipment in other labs to evaluate the potential for ours.

• Continue to offer guidance to new employees.

• Continue to offer my skill sets to co-workers if needed.

• Work efficiently and effectively to ensure optimum time management.

• Evaluate how I can better contribute to efficient equipment processes.

• Evaluate procedures involving outside departments to improve efficiency.

• Create checklists for routine tasks.

• Compare performance with peers to see where I can improve.

• Actively participate in team meetings—offer suggestions and help.

• Offer to take on any special projects.

• Evaluate quality control.

• Study Best Practices within the industry to implement them individually or as a team.

• Evaluate progress toward meeting challenges established in the previous month.

• Meet with a mentor in the lab to discuss areas for improvement.

• Meet with a management mentor to discuss improvement and growth areas.

• Review the first 90 days with the supervisor for performance evaluation.

• Work with supervisor to set long-term goals.

**30/60/90 DAY BUSINESS PLAN [operations role]**

Prepared by: Silas Operations

Prepared for: Delax Hiring Manager XYZ Company

Date: Date/Month/Year

**FIRST 30 DAYS**

• *Education*

o Product/ Services – Basics

• Attend company training

(If you can name the training here, do so.)

• Learn from peers/team

• Set up individual meetings for one-on-one discussion

• Continue home study of products and services

• Read the company manual

• Read promotional materials

o *Orientation*

• Meet management, team members, and support departments

• Visit heads of support departments or whomever your counterpart in that department is that you’ll work with

• Learn company culture

• Learn company policies and procedures

• (If you can name particular company systems here, do so.)

• Study budget, inventory, and supplies

• (If you can name the specific data systems, do so.)

• Meet vendors and customers

• *Organization*

• Organize office

• Set up communication/data network

• Phones – set up voicemail

• Computer accounts – set up an email account

• Business cards – have them printed

• Have all appropriate HR paperwork turned in

• *Research*

• Do a SWOT Analysis (Strengths, Weaknesses, Opportunities, Threats) to inform strategic planning

• Identify the company’s biggest competitors and compare/contrast your company with them to identify areas for

improvement or opportunities for growth

• Conduct informational meetings with department heads

• Identify top organizational issues

• Research possible solutions

• Use the 80/20 Rule to prioritize organizational issues and solutions

• Identify critical levers for success

• Goals and Objectives

• Find a mentor who is successful in this role and can pass on suggestions

• Meet with supervisor to establish expectations and review requirements

• Develop appropriate action plans based on training and review of the organization

• Establish monthly and quarterly goals

**FIRST 60 DAYS**

• *Build Relationships*

o Build rapport with the company

• Review department satisfaction and address issues

• Continue to dialogue with team members for continual improvements in relationships and productivity

• Visit other departments to determine tasks/relationships

• Develop a network within the organization

• Take note of shipment, production, and product issues

• Follow through on commitments

• Establish as a resource and consultant

o Meet primary customer base

o Attend and participate in committee meetings and functions

 • Offer input and support

• Be a good team member

• Review Budget

o Identify inventory and supply issues

• Establish procedures for addressing issues

• Follow through on commitments

• Establish myself as a resource and consultant

o Examine daily operational cost-controls

o Begin evaluating the cost-efficiency of vendors/suppliers

 • Identify areas to upgrade or improve

o Begin research on long-term goals

• *Education*

o Continue any necessary company training

o Continue to study to improve product knowledge

o Continue study of operations, rules, and procedures

o Study Best Practices within the industry

o Read books on business management

o Join trade associations and attend meetings

• *Research*

o Use the 80/20 Rule to identify top revenue-generating activities

o Use data to identify the most efficient procedures

o Use data to identify the least efficient procedures

o Streamline procedures for better efficiency

o Use the 80/20 Rule to begin evaluating time and task management

• Organize daily schedule for optimum efficiency

o Begin to implement organizational solutions

 • *Review*

o Continue to turn in paperwork/reports promptly

o Discuss observations and plans with a mentor

o Evaluate progress and performance with the supervisor

o Evaluate and refine strategies

o Consider feedback from the manager and team to refine goals

o Work with the supervisor to develop a plan for priorities

**FIRST 90 DAYS**

• Grow and Maintain Relationships

o Continue working with a current customer base

o Continue the dialogue with other departments within the organization

• Develop an ongoing smooth working relationship

o Begin Team Development practices (if in management)

• Identify areas for improvement:

• Computer Skills / Software Training

• Time Management

• Communication Skills

• Cohesive Unit Building

• Implement training

• Evaluate progress

• Implement Procedures to Address Company Issues

o Based on previous evaluations of procedures, develop strategies for improvement

o Set clear expectations

• Provide complete and up-to-date information

• Follow through on appointments and commitments

• Establish myself as a resource and consultant

o Obtain feedback on new procedures

o Offer solutions

o Keep commitments

• Increase Productivity

o Evaluate a group or team using a SWOT Analysis (Strengths, Weaknesses,

Opportunities, Threats)

o Evaluate progress toward the quarterly goal

o Compare your department’s or group’s performance with others at the same level

• Evaluate performance

• Identify new procedures or plans to improve performance

• Implement new ideas

o Use the 80/20 Rule to evaluate staff performance (if in management)

o Create checklists for routine duties

o Work efficiently and effectively to ensure optimum time management

• Fine-tune schedule

o Take any opportunities for additional training or education

o Brainstorm with the team/manager for ways to encourage creativity and teamwork

• *Review*

o Compare day-to-day activities with Best Practices within the industry

• Make necessary adjustments based on the findings

o Meet with a mentor to discuss observations and progress

o Meet with the manager for feedback on performance

o Establish short-term priorities

o Establish long-term goals

Credit: Adapted from https://careerconfidential.com