

Shown here are a set of steps we recommend you doing before you start your new role.

1	Category	Details & Steps	Your Notes
<input type="checkbox"/>	Connect	Reach out to your team on LinkedIn.	
<input type="checkbox"/>	Connect	Connect with other relevant individuals in the company.	
<input type="checkbox"/>	Research	Read recent articles and industry news about your new company.	
<input type="checkbox"/>	Research	Familiarize yourself with the company's market position and public perception.	
<input type="checkbox"/>	Subscribe	Follow the company's social media channels.	
<input type="checkbox"/>	Subscribe	Set up Google Alerts for the company, industry, competitors, and key customers.	

Congrats you have just started! The focus of the first 30 days should be on **ALIGNMENT** & **BENCHMARKS**, here's what to tackle

2 Category	Details & Steps	Your Notes
<input type="checkbox"/> Historic Performance	Review past marketing performance data and KPIs.	
<input type="checkbox"/> Historic Performance	Analyze what strategies have been tried, what worked, and what didn't.	
<input type="checkbox"/> Cross-Functional Collab	Build relationships with key stakeholders across departments.	
<input type="checkbox"/> Cross-Functional Collab	Gather diverse perspectives on past performance, current state, and future vision.	
<input type="checkbox"/> Product Deep Dive	Gain a comprehensive understanding of your products/services	
<input type="checkbox"/> Product Deep Dive	Understand your buyers and target market	
<input type="checkbox"/> Product Deep Dive	Dive into the value prop today	
<input type="checkbox"/> Product Deep Dive	Document the top 5 competitors for your top product	
<input type="checkbox"/> Collaborative Workshop	Conduct a workshop (in-person or virtual) to align sales and marketing objectives.	
<input type="checkbox"/> Collaborative Workshop	Assign pre-work to participants and establish a post-workshop action plan.	

Now it's on to the middle of your first quarter. This is all aaround continuing down the path of understanding the needs of your team and business.

3	Category	Details & Steps	Your Notes
<input type="checkbox"/>	Competitive Intelligence	Conduct a thorough competitive review to understand competitor positioning and identify opportunities.	
<input type="checkbox"/>	Competitive Intelligence	Gather insights from your team and sales on key competitors.	
<input type="checkbox"/>	Network Insights	Leverage your professional network to gather external perspectives on your company, products, and market impact.	
<input type="checkbox"/>	Network Insights	Take a look at platforms like Trust Radius, G2Crowd and more to gain a perspective on the perception of your organization.	
<input type="checkbox"/>	Voice of the Customer:	Gather direct customer feedback through surveys, NPS programs, or other methods.	
<input type="checkbox"/>	Voice of the Customer:	Analyze feedback to understand customer sentiment, pain points, and preferences.	
<input type="checkbox"/>	Operational Processes:	Document and analyze existing marketing processes.	
<input type="checkbox"/>	Operational Processes:	Identify areas for optimization in areas like budgeting, KPI reporting, content planning, lead management, etc.	
<input type="checkbox"/>	Technology Inventory:	Catalog all marketing technologies used by the team.	
<input type="checkbox"/>	Technology Inventory:	Evaluate tool utilization, budget allocation, potential redundancies, and contract details.	

Let's close out your first quarter **STRONG**. These are the steps we recommend to look like an absolute boss to round out your first 90 days as a CRO/CMO/CGO.

4 Category	Details & Steps	Your Notes
<input type="checkbox"/> Strategic Roadmap:	Develop a comprehensive marketing strategy based on insights gathered.	
<input type="checkbox"/> Strategic Roadmap:	Ensure alignment with overall business goals and obtain feedback from your supervisor/peers.	
<input type="checkbox"/> Resource Optimization:	Align budget allocation with strategic priorities.	
<input type="checkbox"/> Resource Optimization:	Optimize operational processes to support the strategic plan.	
<input type="checkbox"/> Business Case Development:	Prepare a compelling business case for new initiatives, headcount, or consulting needs within your strategy.	
<input type="checkbox"/> Business Case Development:	Clearly articulate goals, connect initiatives to objectives, and outline anticipated ROI.	
<input type="checkbox"/> Presentation & Monitoring:	Present the strategic roadmap to your team, emphasizing transparency and alignment.	
<input type="checkbox"/> Presentation & Monitoring:	Assign team members to create a dashboard to monitor some of the directed changes in place, and begin to create a cadence around that review.	