

How to Use This Checklist

This checklist is designed for anyone who just stepped into a leadership role or wants to reset their approach. Follow it week by week. Check off items as you complete them. Don't try to do everything at once — focus on the phase you're in.

PHASE 1: LISTEN & LEARN (Week 1-30)

Goal: Understand people, processes, and culture before making changes.

Week 1-2: Observe & Connect

- Schedule 1-on-1 with every direct report (no agenda, just listen)
- Map the team structure — who does what, who reports to whom
- Identify the 3 biggest wins the team has had in the last 6 months
- Identify the 3 biggest frustrations the team currently faces
- Understand the current workflow / sprint process end-to-end
- Read all existing documentation (onboarding docs, runbooks, wikis)
- Sit in on every recurring meeting as an observer
- Have coffee/lunch with key stakeholders outside your team
- Ask each person: 'What's the one thing you'd change if you could?'
- Document your observations — don't act yet, just write them down

Week 3-4: Deep Dive

- Review team KPIs and metrics — what's measured, what's not
- Understand the tech stack and key architectural decisions
- Map dependencies with other teams / departments
- Identify quick wins — small changes that create visible impact
- Have a follow-up 1-on-1 with each person to share what you've learned
- Draft your 'Team Health Assessment' based on observations
- Identify the team's top performer and understand what motivates them
- Identify anyone who might be struggling and needs support

PHASE 2: QUICK WINS & TRUST (Day 31-60)

Goal: Build credibility through small, visible improvements.

Week 5-6: Act on Quick Wins

- Implement 2-3 quick wins from your observation notes
- Establish your 1-on-1 cadence (biweekly minimum)
- Create a shared team goals document for the quarter
- Set up a simple feedback loop (e.g., weekly retro, suggestion box)
- Remove one unnecessary meeting from the team's calendar
- Communicate your leadership style and expectations clearly
- Start a 'Wins of the Week' channel or ritual

Week 7-8: Build Systems

- Define clear ownership for key projects and areas
- Create or improve the team's decision-making framework
- Establish escalation paths — when should people come to you?
- Set up a skills matrix — who's strong at what, who wants to grow where
- Begin delegating one thing you currently do yourself
- Have a transparent conversation about career growth with each person
- Align with your manager on success metrics for your team

PHASE 3: STRATEGIC DIRECTION (Day 61-90)

Goal: Set long-term vision and sustainable systems.

Week 9-12: Scale & Sustain

- Present your 90-day findings and proposed roadmap to the team
- Define the team's North Star metric for the next quarter
- Create a hiring plan if gaps exist (or a restructuring plan)
- Implement at least one process improvement based on data
- Set up a mentorship or buddy system within the team
- Establish regular skip-level meetings (if you manage managers)
- Build a 'Team Playbook' document — how your team operates
- Create a personal development plan for each direct report
- Schedule a team offsite or workshop to align on vision
- Reflect: Write down what you've learned about yourself as a leader
- Set your own 90-day review — what will you improve next quarter?

Remember: The goal of your first 90 days is not to change everything. It's to earn trust, understand the system, and create momentum for lasting improvement.