	PHASE 1 **LEARN**	PHASE 2 **IMPLEMENT**	PHASE 3 **ACCELERATE**
MY TEAM	Team structure	Update organization chart	Restructure team, as needed, to optimize our ability to provide value to the company
	Existing team dynamics	Replace under-performers	Clear onboarding for new hires.
	Identify missing key roles	Hire into key roles	Clear onboarding for new hires.
	One-on-ones with directs (recurring)	Establish new cadence with leads for communicating expectations. Provide actionable feedback for team leadership/accountability Understand individual goals	Develop cadence of accountability for continuous learning/growth
	Ownership and accountability process (leads and individual contributors)	Establish new cadence for establishing ownership/accountability across the entire team (planning, checkin, status, etc)	Continue to strengthen ownership and accountability process. Measure accuracy for the purposes of continual improvement.
	Skip levels with individual contributors	Understand individual goals Establish skip-level cadence	Support leads to drive continuous learning/growth on their teams
COMPANY-WIDE	What do I need to do from HR/Benefits to personally onboard?	Determine opportunities for personal growth areas within the existing work to be done.	OKRs for my personal growth areas.
	Establish lines of communication to C-suite Get to know my peers	Recurring one-on-ones Build trust and effective feedback cycles	Recurring and effective feedback cycles with peers, CEO and Board
	Meet key groups (i.e. Support/Sales)	Establish clearer lines of escalation and resolution	OKRs for resolution accountability.
	Form initial perception of culture/values	Work with C-level to codify C-level ownership	Share culture/values externally to attract more top talent.
	Take ownership of Tech areas that are still managed by others		
PRODUCT & PROCESS	Planning process	Establish new planning process foundationals	Continuous learning/growth cadence for planning process.
	Features in flight	Establish ground rules and timeline to resolution.	
	Product(s) - all features/functions	Identify high priority gaps and prioritize resolution.	Develop plan to prioritize new features, enhancements and tech debt in harmony.
	Existing release notification process.	Establish recurring basic release notification.	Incorporate company-wide teams into the release completion process (success, support, marketing, sales). Sell to roadmap and what's coming.
	Existing roadmap.	Develop effective roadmap.	Interative cycles of improvement on roadmap and planning process
	Feature definition workflow.	Establish working agreements and feature definition structures	Continuous learning/growth cadence for feature definition.

	PHASE 1 **LEARN**	PHASE 2 **IMPLEMENT**	PHASE 3 **ACCELERATE**
	Engineering implementation process	Process for making commitments.	Develop metrics that we measure ownership and accountability (see Accelerate metrics)
	Retrospective process	Establish more effective retrospective process. Establish retrospective for features that are behind schedule.	Continuous learning/growth cadence for retrospectives. Hand retrospective ownership/action over to the teams. Measure effectiveness.
	Product performance, stability and reliability	Prioritize performance, stability and reliability features into the roadmap. Dedicate staff to work on backlog.	Team ownership and accountability for performance, stability and reliability. Eliminate backlog of open issues.
	Evaluate existing monitoring.	Strengthen system monitoring. Accountability within team for service levels and resolution of issues.	OKRs for response time, resolution team and open issues.
CUSTOMERS VENDORS & PARTNERS	Key vendors	Build relationships with existing vendors (business and technical) Are they they right vendors for us to be using?	Optimize and strengthen foundational work with vendor platforms. Migrate off vendor platforms as needed.
	Key integrations/partners	Build relationships with existing partners that we integrate with	Align roadmaps with partners Iterative feedback process between Product/Success team and key customers.
	Key customers	Back up Sales and Account Management on key vendor and prospect calls.	Iterative feedback process between Product/Success team and key customers.
	What is Sales selling now?	Ensure planning and release process has Sales aligned.	Sell to the roadmap.
SECURITY, POLICIES & COMPLIANCE	Existing platform security	Resolve existing security and compliance gaps.	Monitoring, recurring audits and reporting Ownership to team for security-first perspective.
	Identify existing policies (e.g. IT, data, DR, etc)	Update existing policies as needed. Identify and resolve policy gaps.	Recurring reviews. Proactive readiness for future audits: SOC2, 3rd party scans, due diligence, etc.
	Find historical vendor, customer and partner compliance reports.	Pull all compliance documentation into a central repository. Develop knowledge base of common compliance questions.	Establish team ownership for compliance reviews.