Equifax - RPA/AI Automation Leader - Draft
30-60-90 Day Plan

	30 Days	60 Days	90 Days
SMART Goals & Action Steps	• **Goal: Establish rapport and understanding of team dynamics** Action Steps ✓ Schedule and conduct one-on-one meetings with each team member within the first two weeks. ✓ Create a summary document on team strengths, areas for development, and individual working styles. • **Goal: Understand current project statuses** Action Steps ✓ Review of all project charters, briefs, and progress reports in the first 10 days • **Goal: Familiarize with internal systems and tools** Action Steps ✓ Complete training in relevant project management and reporting software within the first week • **Goal: Training Needs Assessment** Action Steps ✓ Identify skill gaps within the team and plan for necessary training sessions. • **Goal: Tools and Technology review** Action Steps ✓ Assess the current RPA tools and technologies in use and explore potential upgrades or alternatives. • Evaluate the existing RPA operations, identifying strengths, weaknesses, and areas for improvement.	• **Goal: Training and development** Action Steps ✓ Conduct training sessions for the team on the new processes and tools. • **Goal: Enhance cross-functional collaboration** Action Steps ✓ Facilitate brainstorming sessions to identify collaboration opportunities and document action items. • **Goal: Review and/or develop a detailed roadmap for upcoming projects aligned with organizational goals.** Action Steps ✓ Gather input from key stakeholders to define project milestones and deliverables.	• **Goal: Improve team performance.** Action Steps ✓ Identify skills gaps through surveys and performance feedback by day 70. ✓ Coordinate and schedule two training sessions, documenting results and improvements. • **Goal: Establish a reporting cadence with stakeholders.** Action Steps ✓ Design a reporting template that includes KPIs and project updates for consistency. • **Goal: Performance Monitoring.** Action Steps ✓ Continuously monitor the performance of the automated processes, using metrics and KPIs to measure success. • **Goal: Documentation.** Action Steps ✓ Document the improved processes and create a comprehensive knowledge base. • **Goal: Ongoing support and training.** ✓ Provide ongoing support and training to ensure the team is fully equipped to manage and optimize the RPA operations.
Deliverables	• Meeting minutes • Summary document of team strengths, development areas, and working styles • Project status report, including timelines, current challenges, and immediate risks.	• Documented workflow analysis, list of improvement proposals, and results of any pilot tests. • Meeting agendas, meeting notes with action items, collaboration proposal document.	• Milestone completion report with outcomes and lessons learned. • Skills assessment report, training session agendas, post-training assessment. • Reporting template, first monthly report
Key Performance Indicators	• 100% Completion of introductory meetings; documented insights on team dynamics • 100% review of project documentation; on-time submission of the status report.	• **process improvements identified and piloted, reduction in identified bottlenecks. • **interdepartmental meetings completed; actionable cross-functional initiatives identified.	• **training sessions completed: post-training improvement in team productivity or performance.
Resource Requirements	• Access to team schedules, support from team members for availability • Project management software • Project management documents	• Time from team members for analysis, possibly additional software for testing improvements. • Meeting rooms, time allocation from relevant stakeholders. • Input from stakeholders, design tools or software for roadmap creation.	• Project management software, budget and resource allocation reports. • Training materials, training facilitators, team time allocation. • Reporting software, feedback from stakeholders to refine the report format.

** Key performance indicator(KPI) without measurable objective