**Equifax - RPA/AI Automation Leader - Draft**

**30-60-90 Day Plan**

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|  | **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