**Sorriso 30/60/90-Day Transition Plan**

Section One – The Organization Context (Where, What, Who, Why, What, and How)

The answers to these questions will become clearer as you go but start with some observation answers. Keep it brief – bullet points are fine as long as they communicate enough of the thoughts to make sense. A top few (4-8) approach is useful to keep focus and identify core drivers.

1. Where are you? Describe the most important aspects of the company history, customers/markets, people, and culture.
2. What do we do? What is the product mix, what is in the pipeline, where is the future of the industry going?
3. Who are the core leaders? What do they think about your unit’s previous performance, what advice or core observations did they make?
4. Why are you here now? Why were you hired, what is the big picture of the current state of your unit/department/function, and what can you bring to create success?
5. What do you need to do? What is your big-picture goal and “must do’s” actions?
6. How can you connect, communicate, and continue to learn?

Section Two – Learn, Lead, and Plan

For each section, add actions based on the rubric; priority/need, actions, intended outcome, timing, measure of success. The rubric has space for six actions in each area. A good reminder is to stay focused on the most important things first, and 3-6 are typically sufficient. The list may change as you continue to make progress; you can add/modify over time as it fits your transition need.

**Organization Context (add points and pages as needed) – Answer questions based on case, examples are included.**

1. Where are you? Describe the most important aspects of the company history, customers/markets, people, and culture.

* Privately held
* Very team-focused

1. What do we do? What is the product mix, what is in the pipeline, where is the future of the industry going?

* Digital
* Global in emerging markets

1. Who are the core leaders? What do they think about your unit’s previous performance, what advice or core observations did they make?

* Bob Dent, really need to get organized and clear direction

1. Why are you here now? Why were you hired, what is the big picture of the current state of your unit/department/function, and what can you bring to create success?

* Understanding of growth in software business context

1. What do you need to do? What is your big-picture goal and “must do’s” actions?

* Learn about the industry, be able to speak the language
* Assess the team, fill in gaps

1. How can you connect, communicate, and continue to learn?

* Establish regular cadence of discussion with direct reports
* Set up one-on-ones with peers
* Maintain this plan with updates

**Learn – What do you need to learn to be successful? Complete a few priorities/needs, an example is included.**

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| Priority/need:  Learn the big-picture of dental industry  Intended outcome(s):   * Conversant with peers and reports and customers * Aware of opportunities and issues in the industry and markets * Start to recognize partner opportunities   Overview actions:   * Read articles daily * One-on-one meetings with thought leaders in the business units * Take advantage of webinars and updates from business, especially product development, listen in as much as possible   Timing (start-complete targets):   * Start – now, ongoing   Measure of success:   * In 30 days know what I don’t know * In 60 days know enough to be comfortable with key clients * In 90 days be able to contribute to enterprise direction conversation | Priority/need:  Intended outcome(s):    Overview actions:  Timing (start-complete targets):  Measure of success: | Priority/need:  Intended outcome(s):    Overview actions:  Timing (start-complete targets):  Measure of success: |