

**Andrew Brown's
“First 90 Days Learning Action Plan”**

**A disciplined approach to
get ramped up quickly in your organization**

First 90 Days Learning Action Plan

Part 1: Objectives, Outputs and Measures of Success

Objective: Andrew to acquire a working understanding of your products, brand, and related services. Measures of Success: (i) The ability to concisely describe each product/service, the value they bring to target audiences, the pricing (and pricing variables); and (ii) The ability to describe how the products/services are different from those offered by direct and indirect competitors.

Objective: Andrew to develop a growth plan that builds upon, supports, and contributes to, the Business Development Plan and other relevant company priorities. Measures of Success: (i) Senior Marketing/Product leaders approve the plan; (ii) The plan has support from key internal stakeholders; (iii) The plan is mapped against specific company goals (e.g. market revenue and/or penetration goals, reputation/brand goals, and/or retention goals); and (iv) The plan has reasonable measures of success, methods to verify success, and a budget/timeline that reflects short-term/long-term (and/or regional-specific) targets and the desired brand experience for targeted audiences (e.g. customers, users, prospective customers, strategic partners, channel resellers and technology partners).

Objective: Andrew to develop a working understanding of your organization’s culture, key internal/external stakeholders, decision makers, day-to-day work processes and relevant industry players. Measures of Success: (i) The ability to conduct productive meetings, meet the company’s quality standards/code of ethics and meet deliverables/results; and (ii) The ability to effectively engage with the company’s colleagues, customers, prospective customers, industry influencers and relevant media/analyst influencers.

Objective: Andrew to create an initial skills/career development plan for the existing (and imminent) members of the Product Marketing Team. Measures of Success: (i) The plan receives sign-off from each (existing) team member; (ii) The plan is aligned with HR’s structure; and (iii) The plan achieves sign-off from senior management for resourcing.

Part 2: Inputs for Review and Analysis

Note: I have made assumptions about the company’s titles, and availability of sources to be involved in my onboarding. I have also assumed certain documents/tools to be in-place. **If they are not currently in-place, they may be among my deliverables in upcoming plans. If certain roles do not exist, it may be necessary for this position to take on these responsibilities.**

Focus	Topics	Sources (Individuals/Groups)	Sources (Documents/Tools)
Your Organization	Company-wide Strategy	CEO, EVP of Marketing	Strategic/Growth Plan, Core Values, Annual Report
	Corporate Brand, Brand Positioning, Brand Standards and Company Tone of Voice/Lexicon/Personality (Target vs. Actual)	CEO, Select Customers, Creative Agency, VP of Marketing, Channel Partners, Copywriter(s), Graphics Specialist	Corporate Identity Guide, Collateral, RFPs and Proposals, Brand Research (online/3 rd -party), Company Survey
	Corporate/Team Structure	EVP Product, Go-to-Market, H.R. Team	Organization Chart, Functional Chart, Corporate Directory
	Human Resources-Related Policies and Values	H.R. Team	Company Policy, Onboarding Manual, Performance Evaluation Process/Targets

Focus	Topics	Sources (Individuals/Groups)	Sources (Documents/Tools)
	Available Resources and Process for Securing Support (i.e., In-house, Preferred Vendors – e.g., for Graphics, Research, etc.)	EVP of Marketing, Director of Procurement or Operations, Partner Success Director	Marketing Budget, Directory of Service Providers (with in-house Reviews)
Portfolio of Products	Product Strategy, Product/Service Personalities/Sub-brands/Product Tone of Voice/Lexicon/Personality	CEO, EVP Sales, Chief Product Officer, Product Directors, Media/Marketing Agency, UX Designers, Partner Success Director	Product Roadmaps, Industry Analyst Reports, Service/Product Identity Guide/Naming Guidelines, Company Survey, Use Cases
	Current Products/Solutions/Services - Configuration/Features, UVP/USP	Select Customers/Prospects, EVP of Marketing, Partner Success Director	Online/Offline Marketing Materials, RFPs and Proposals, Case Studies (and Case Study Templates), Product Training Materials
	Product/Service “Customer Experience”, Tools Used for Backlog of Customer Issue Tickets, Type/Frequency/Timing of Sharing/Batching Customer Feedback to Development Team/Marketing, User Group Events (and Sponsors)	EVP of Marketing, Product Directors, Account Managers, Select Customers, UX Designers, User Groups	Customer Experience Feedback, NPS-Equivalents/Analyst Reports, User Group Reports, User Group NDAs/Agreements, QBRs
	Product Development Processes – Timing/Scheduling, Key Players and Methodology, Stand-up Sessions, Tools Used for Tracking Development and Backlog of Desired Features/Tickets, Product Release Plans	EVP of Marketing, VP of Operations, VP Sales, Select Customers/Prospects	Product Selection Criteria, Product Charters, Tracking Tools/Dashboards, Feature Selection Criteria and Path from Request to Development
	Cross-Organizational Understanding of Products	Division Leaders, Functional Leaders, Director of Training/Development, Product Directors	Company Research (e.g., internal surveys)
Business Dev.	Sales Revenue Targets - by Audience, Quarter, Buyer Persona, Offering and Sales Methodologies (e.g., Sandler, SPIN, Challenger)	CEO, VP Sales, CRO, Partner Success Director, Select Channel Partners	Marketing/Revenue-Generation Plan, Channel/Alliance Agreements and Targets
	Business Development/Demand Generation (Targets, Processes, Tools) Lead Scoring (incl. Definition and Criteria for MALs, MQLs, SALs, SQLs), Buyer Journey(ies), Criteria for TOFU, MOFU, BOFU, Acquisition Costs (Targets); Customer-Focused Webinar Schedules	CEO, VP Sales, CRO, EVP of Marketing, Partner Success Director	BD Plans, Forecasts vs. Actuals, CRM Pipeline Reports, Sales Decks/Collateral, Sales Scripts, RFPs, RFP Go/No-Go, RFP Success Rate, Post-RFP Win-No/Win Analyses, QBRs, Product Training Plans/Tools, Sales Onboarding Playbook and Battlecards, Cheat Sheets, Document Management System
	How/when Collateral is Used, Evaluated and Updated Opportunities for In-product Marketing		
	Structure of Sales Team (i.e., Skills - Hunters vs. Farmers, Customer Segmentation – e.g., Large vs. Small, Verticals), Product Training Curricula, Training, Baselines, Targets, Incentives and Obstacles		Business Development Training and Learning Management System
Contracts, Service Level Agreements, Pricing	VP Sales, CRO, CFO, Chief Legal Officer or General Counsel	SLA Boilerplates and Pricing Guidelines	
	Marketing/Marketing Communications/Content Metrics	Creative/Digital Agency, EVP of Marketing	Results from Marketing Programs, Web Metrics/Analytics, Social Media Metrics
	Recognition, Sentiment/Perception of Brand and Products/Services	Existing/Prospective/Targeted Customers, EVP of Marketing, VP Sales	Brand Research (online/3 rd -party), Social Listening Tools
	Planned Marketing Initiatives (incl. Publications, Publication Tools, Events)	EVP of Marketing, Media/Marketing Agency	Marketing Plan, Marketing Calendar

Focus	Topics	Sources (Individuals/Groups)	Sources (Documents/Tools)
Marketing	Speakers/Spokespersons/Storytellers – Areas of Expertise (by Willingness, Skills, Availability)	EVP of Marketing, CEO, CRO, VP Sales	Marketing Plan, Marketing Calendar
	Online Advertising/Promotion – Search Engines, Directories, SEM, and SEO (Keyword Tests, Trends, Planned Initiatives, Budget, Targets, Dashboards)	EVP of Marketing, Demand/Lead Generation Specialist, Media/Marketing Agency	Marketing Plan, Marketing Calendar
Partnering	Partnering Structure, Partner UVP, Partnering Support, Ideal Partner Profile/Criteria, Partner Training Curricula and Scheduling, Partner Reward Structure/Criteria, Partner Onboarding, Partner Nurturing, Current Partners/Pursuits, Partner Software and Readiness, Prioritized KPIs (Revenue, Engagement Retention, Acquisition, Profile), Unique Partner-initiated MQLs	Partner Success Director, CRO	Partner Manuals, Partner Training Materials, PRM User Guides and Usage Reports
	Perception of/Value Placed on Partnering within your organization and with Existing/Desired Partners	Partner Success Director, H.R. Team, VP Sales, CRO, EVP of Marketing	Company/Department Research, Turnaround and Responsiveness Behaviours, Department NPS Equivalent
	Andrew's KPIs/Reporting to Supervisor(s), Project Tracking (Software Used and Structure of Reports)	EVP of Marketing, Directors of Product, Partner Success Director	Weekly Dashboards/Updates
Existing Target Audiences	Market: Audience Attributes/Segmentations and Existing Buyer Personas (Problem-Focused), Profitability and Acquisition Costs	CRO, VP Sales, EVP of Marketing, Directors of Product	Existing CRM Reports; Relevant Association Research
	Purchase Processes – Online/Offline Along with Current Use of Available Resources	VP Sales, Select Customers/Partners	Customer Surveys, Web Analytics
	Influencers, Potential and Existing Ambassadors	EVP of Marketing, VP Sales, Partner Success Director	CRM Reports, Sales Reports
Competitors	Offerings, Strengths/Weaknesses Market Share, Competitive Advantage (i.e., Switching Costs, Searching Costs, Habit Formation, Economies of Scale or Government Regulation), Competitor Strategy, Competitor Pricing/Positioning/Promotion	VP Sales, Existing/Prospective/Targeted Customers, Partner Success Director, VP of Marketing	SWOT Analysis, Industry/Profession Reports, Leading Journals/Blogs/LinkedIn Groups/Quora Groups/Reddit, Proactive RFP, ROI/TCO Calculator, Demo Environments
Industry	Current, Possible and Planned Strategic Partners	Subject Matter Experts, Partner Success Director, Channel Partners, EVP of Marketing	Strategic/Growth Plan, Alliance Criteria/Processes and Related Documents, Industry Analysts/Reports
Media	Media Protocol	Media/Marketing Agency, Subject Matter Experts	Media Intake Process, Interview Guidelines
	Online/Offline Journals and Influencers – Titles/History/Contacts (by subject)	EVP of Marketing, Media/Digital Agency	Media Coverage, Interview Requests, Media Kit, Media Briefings (Media Tracking Tool)
	Speakers' Bureaus – Titles/History/Contacts	EVP of Marketing, Media/Marketing Agency, Subject Matter Experts	
Awards	Submitted, Won/Lost, Desired, New (and Importance Placed by Key Stakeholders) Awards Submitted on Behalf of Partners	EVP of Marketing, Media/Marketing Agency, Subject Matter Experts	Awards Strategy, Awards Participation, Awards Calendar
Events	Key Profession Events, Key Client/Member Events, Influencer Events, Partner/Channel Events, Innovation Events, Key Industry Events	VP Sales, EVP of Marketing, Subject Matter Experts, Select Channel Partners	Events Strategy, Events Calendar, Event Evaluation/Assessment Reports (Pre/Post)

Critical Success Factors (for this Role) During First 90 Days

1. Introductions made by key leaders to establish clear expectations
2. Identification of, and delivery on, a quick win/deliverable
3. Participation at meetings with leaders/professionals in charge of: Products, Customer Success, Sales, Partnering, and Marketing
4. Time spent with marketing professionals whose job responsibilities are evolving because of this new role
5. Identification of any “landmines”
6. Initial/overview training of products/services