



# Setting the scene for success

An HR leader's guide to the first  
30, 60 and 90 days in a new role



## Congratulations on your new role!

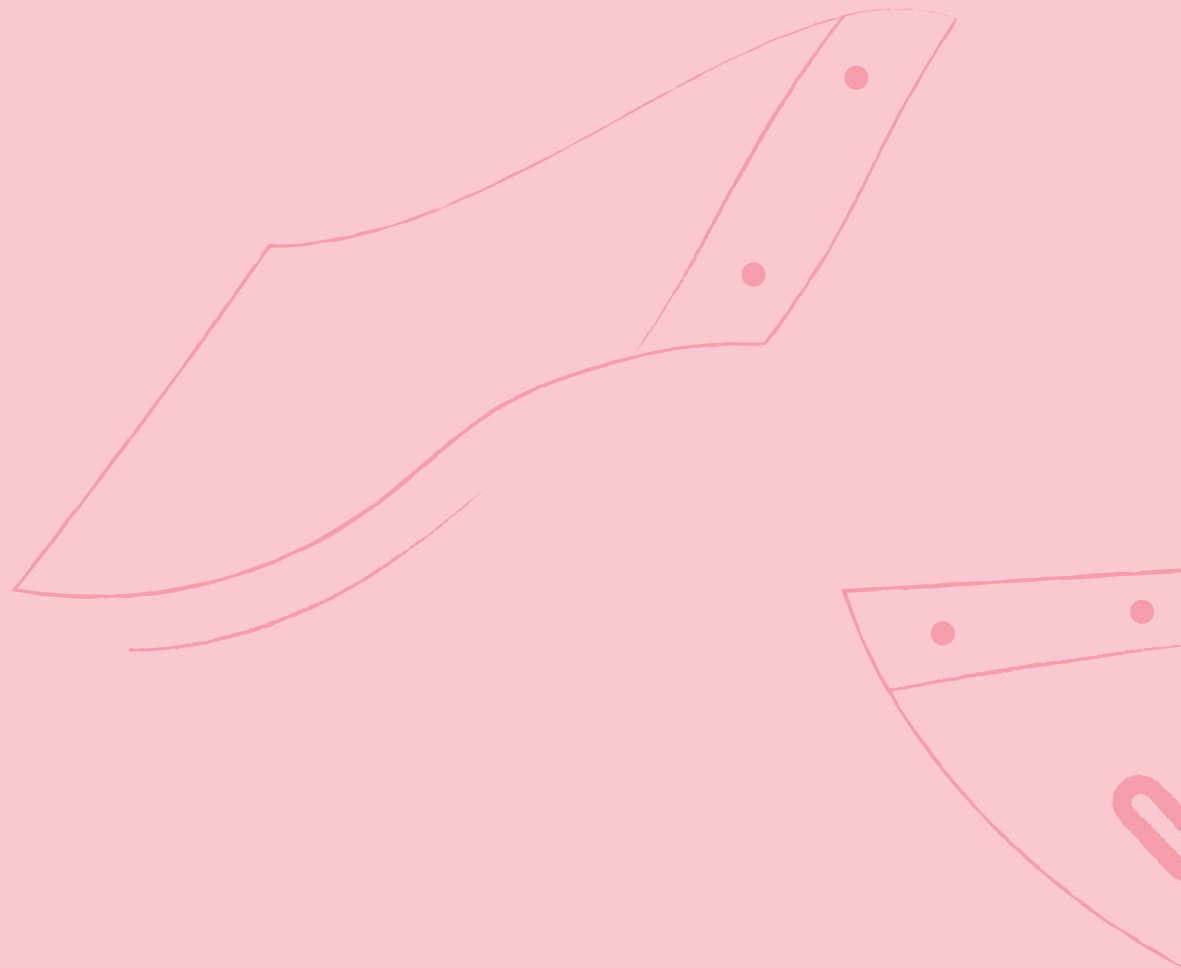
We've put together this *Setting the scene for success* ebook with some great tips for areas to focus on, distractions to avoid, and how to position yourself as a strategic business partner in your first 30, 60 and 90 days in your new role.

If you haven't already, you might like to join our [People Geeks Slack channel](#), where HR pros from all over the world share their experiences and knowledge.

If we at Culture Amp can be of assistance, please don't hesitate to reach out.

Didier Elzinga  
CEO

Culture Amp



# Getting started checklist

## 30 DAYS

- ☐ Build relationships
- ☐ Position yourself as a strategic partner

**TIP:** Resist making immediate changes.

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## 60 DAYS

- ☐ Establish baseline people data
- ☐ Right-size expectations

**TIP:** Speak their language.

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## 90 DAYS

- ☐ Share findings & immediate “low hanging fruit” opportunity
- ☐ Get an early win with that “low hanging fruit”

**TIP:** Say what you’re going to do, do it, tell them you did it.

# 30 days

## Build relationships

Reviewing data and speaking with other executives provides important insights, but meeting people and establishing relationships is just as important. In addition to getting the lay of the land, spending time observing and getting to know people will give you an understanding of what people expect from someone in your role, and what they see as important for the organization. There will be plenty of squeaky wheels of course, but also lots of valuable insights. Denise Lyle, VP of Employee Success at Campaign Monitor, dedicated time to 1:1 meetings when she first joined the organization. “I had over 50 one-on-ones with employees in the first 60 days,” she says.

By focusing on a few questions – which she asked everyone she met, from CEO to people in entry-level roles – Lyle was able to get a sense of what made Campaign Monitor different, and what employees valued. “One of the questions I asked everybody that I met with was, ‘What makes Campaign Monitor a special place to work and why do you choose to work here?’ Probably 80% of the answers I got were related to some aspect of their employee experience, like our philanthropy ‘Giving Back’ and Diversity & Inclusion programs,” she says.

You might like to create a list of people (or teams or roles) you’d like to check in with, and one or two questions you’d like to ask everyone.



## Position yourself as a strategic partner

One of the challenges many HR leaders we meet face – whether they've been in their role for a long time, or have just started – is establishing themselves as a strategic partner, rather than simply a service provider.

Lyle was attracted to her role at Campaign Monitor because the importance of HR was already recognized. “When I joined, there were seven of us on the executive team. The Head of People role was designed to ensure consideration of the employees' perspective in the company's decisions.”

Lyle says, “Weigh in. Participate. Be present. Provide value. Most companies should realize the value of people, at a minimum the high cost of turnover, so HR leaders represent that perspective.” She adds, “When you're in executive team meetings and they're talking about something that you think may not pertain to your direct area of business, figure out how it does and offer your perspective within that conversation.”

Many of the executive team at Campaign Monitor had worked together previously. “They had a desire to add diversity to their team and work better together,” explains Lyle. “We did an executive retreat and took a close look at how we run our meetings, how we make our decisions, how we cascade information throughout the organization, how we on-board new executive members. Focusing on how we function as a team, in addition to what we do, has made a tremendous impact on our executive team, and in turn an impact on our organization. This was something that I brought to the table in collaboration with our CEO.”

Illustrating the power of your expertise in this way can encourage people to approach you to help solve problems, rather than just execute their already-decided solutions. “Use your expertise in people to also be a leader within the executive team. If you can help them make more collaborative decisions and get things done faster and better then you're improving your value. You're not just an organizational strategist, you are more importantly, a people leader,” says Lyle.

### TIP: RESIST MAKING IMMEDIATE CHANGES

“You initially jump in and see opportunities to change or update lots of small things, but the real value is getting a sense of the bigger overall picture. Those small bits are often symptomatic of larger areas that need development or evolution,” says Julie Rogers, Head of People at Culture Amp. Try and resist the urge to make small changes, and instead gather information to shape your strategy.

# 60 days

## Establish baseline people data

Depending when your organization's last engagement survey was, you might wish to launch a new one. "I want good baseline data because my conversations with employees will only go so far," says Lyle. "And, let's be honest, I probably do have a biased lens; anybody does when they're interviewing people. People may not be as honestly responsive when they're being interviewed by the executive in charge of people."

When Culture Amp Head of People Julie Rogers first started, we were only a few weeks away from launching our quarterly pulse survey. Because of this, Rogers was able to get a clear understanding of where some of our challenges were. She says, "As a new leader, people tell me their challenges and I start getting personal insights. However, the aggregated data through a survey tells me a story reflecting the overall view of where the challenges are. That's important because otherwise you're just hearing one voice. Surveys are the voice of many."

Employee survey data is unbiased and provides a scalable way for you to get feedback from people. A good employee engagement survey will show you what's driving employee engagement and also highlight hot spots that need attention and areas where your organization is doing well. Your baseline will be the foundation for your people analytics strategy and helps you determine what to focus on in your first year.



## Right-size expectations

It seems that even though we create great role descriptions and discuss expectations in detail, there's room for interpretation around roles. "I vetted a lot of expectations during my interview process because I wouldn't have taken the role if there were a mismatch between their expectations and what I was able to and wanted to deliver. But then there was this process of really setting those expectations initially once I started," explains Lyle.

Many people's expectations will be revealed through the kinds of actions they suggest need taking, others will be more overtly stated. You might choose to restate your understanding of your role during these conversations, or take in everyone's ideas and use your strategy planning to restate your role and priorities.

- Potentially, the areas that you learn need attention will help shape the structure of your team. "I had my own checklist of the different aspects of what we call Employee Success at Campaign Monitor," says Lyle. "Employee Success, or HR, if you will, at Campaign Monitor is actually three departments. We have traditional HR, Recruiting, and Employee Experience. We give all three of those departments investment and attention." Structuring the Employee Success team in this way communicates what people can expect, and from whom.

### TIP: SPEAK THEIR LANGUAGE

Our COO sends out a report every week on metrics around the business. I copied the format of his Google slide presentation and I send around a report every week on people metrics," says Lyle. Her report shares information on new starters and people finishing up, upcoming events, open roles and candidate pipeline, things happening in each office in the next two weeks, and what percentage of employees are in each department and in which location. "Who's coming and going, what our hiring priorities are across the org, events where we need exec presence – that kind of thing. They really appreciate it," she says.

# 90 days

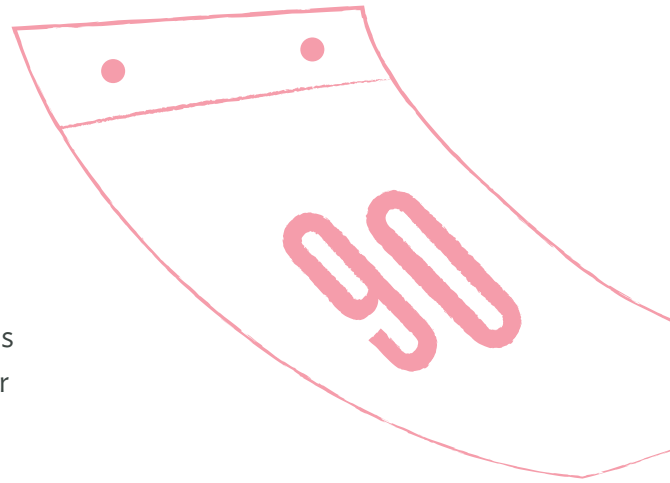
## Share findings from survey data

“I can’t wait to get these results in front of our executives,” says Lyle. “One thing that I find grabs the attention of executive teams is saying, ‘Hey, this is what your high performers think versus your low performers’.”

Lyle presents topline results in a succinct slide deck. “During that presentation, the last slide in the presentation says, ‘Okay, now pop open your laptop. Go to this web address. Log in and there’s your report. Take a look at your team. Take a look at the company data.’” She then walks the team through how to use Culture Amp, so they’re immediately empowered to explore the data.

Once the executive team has seen the results, the organization as a whole has visibility of the action planning. “A big thing for me,” says Lyle, “is not only getting the data and doing the action planning around it, it’s communicating back to the employees. Communicating the results, communicating the action plans, communicating when we have taken action that is a result of their giving us feedback. Not communicating is where survey-taking can backfire. We aim to let our employees know that we’re listening to them and their voice counts. In fact, they get the number one say in their employee experience at Campaign Monitor.”

As part of your action planning, you’ll be able to plan focus areas for the next 12 months – and you’ll have the base data to measure against. You can survey again as soon as you’ve taken action, measure your results and share your successes and learnings. Improving scores on your areas of focus is a fantastic, measurable way to prove success.





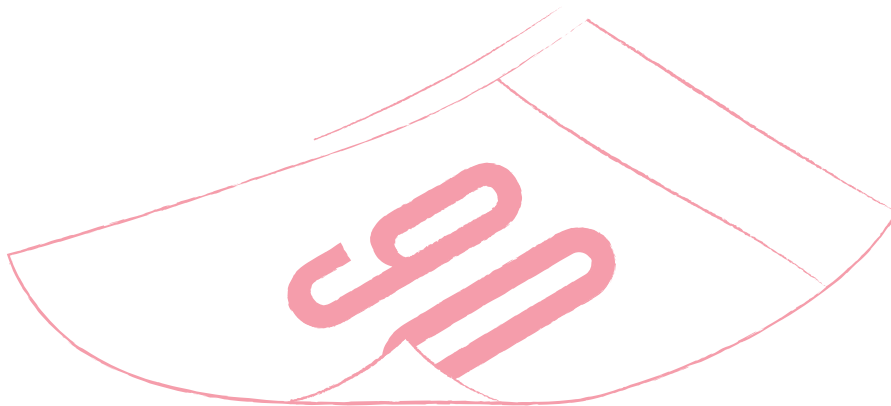
## Get an early win

For any new hire, being able to say “I accomplished ‘this thing’ in my first 90 days” is important. As an HR leader, you want to choose an early win that will have value-add effect immediately. Look at where the biggest pain points in the business lie (outside of the low-hanging fruit) and make a plan of action. While it’s important to make this first big decision, don’t become obsessed with making sure it’s the most perfect big decision.

Lyle advises, “Make that first big decision but be okay with it if you didn’t get it right. That’s the challenge – being afraid to make a big decision in case it’s not a perfect decision. How to overcome that is two-fold: one, don’t be afraid and two, know that you can always, in the spirit of continuous improvement, tweak and evolve something.” Make sure that your plan of action is visible to stakeholders – the CEO, executives, your team and the rest of your organization.

**TIP: SAY WHAT YOU’RE GOING TO DO, DO IT, THEN TELL THEM YOU DID IT**

It can feel counter-intuitive to highlight your successes and learnings, but it’s an important part of your development, and taking the team with you on the journey. “Say what you’re going to do, do it, then tell them you did it,” says Lyle. “Set some really good goals that are interesting to the organization. Clearly communicate what those goals are. Knock those goals out of the park. Involve other people, other members of the executive team in those wins. Make your wins their wins or make their wins your wins.”





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effectiveness diagnostics are used by some of the  
world's most innovative organizations.

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