ORGANIZATIONAL INTELLIGENCE · EXECUTIVE APPLICATIONS

The Ninety-Day Compact
Executive Workbook

A working document for the sponsor's side of an executive transition: the CEO, founder, board member, or operating partner who made the hire.

Written for the ninety days between an executive's first morning and the readout that ends their discovery period. Employer-agnostic, and built to be filled in before the offer letter goes out.

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erikrmiller.com/blog/what-ceos-expect-first-90-days/

Start before day one

Executive transitions rarely fail for lack of talent. They fail because nobody wrote down what was expected, and each party kept a private version of the agreement. This workbook makes that agreement explicit. Fill in pages two and three before the leader's first morning; use pages four and five during the ninety days that follow.

SECTION 1

The mandate page

One page, written by the sponsor, then edited together with the incoming executive before day one. Keep the edited version. This is the document the transition will be judged against.

WHY THIS HIRE EXISTS

The problem this appointment answers, in two sentences.

WHAT SUCCESS LOOKS LIKE AT 12 MONTHS

Stated so both of you would recognise it independently.

DECISION RIGHTS

What this leader decides alone, decides with you, and recommends.

CONSTRAINTS THEY SHOULD KNOW NOW

Budget, commitments already made, people decisions in flight.

WHAT IS NOT THEIR JOB

The single most-skipped line, and the one that prevents the most damage.

The Ninety-Day Compact

Four provisions from the organization, four returns from the leader. Complete each row together, then both keep a copy. Patience is protected because it expires; scrutiny is fair because its terms were named.

THE CEO PROVIDES	THE LEADER RETURNS
Mandate Why they were hired, in writing, edited together.	**Presence** Visible, structured discovery in the field.
Access People, numbers, customers. Introductions that invite candor.	**Evidence** Findings on a cadence. Surprises included.
Protection The pressure for early action absorbed, publicly.	**Respect** What works named early; the builders credited.
A date The discovery period ends on a day chosen up front.	**The readout** Findings and first moves, on that date.

AGREED DATE OF THE READOUT ______________________

Put it on the board calendar the same day the offer letter goes out.

Reading the signals

Disciplined discovery produces artifacts. Drift produces explanations. Around day thirty and again around day sixty, mark each row. Three or more on the right is a conversation, not a verdict.

SIGNAL	DISCOVERY	DRIFT	D30	D60
QUESTIONS	Sharper each week, built on what was learned.	Week eight sounds like week one.	☐	☐
FINDINGS	Patterns and open questions, in writing.	Impressions and anecdotes only.	☐	☐
CADENCE	A rhythm of check-ins the leader initiates.	Updates only when you ask.	☐	☐
WHAT WORKS	Named early, specifically, in public.	Verdicts without evidence, or silence.	☐	☐
THE DATE	The readout is referred to constantly.	Getting up to speed has no end.	☐	☐

WHEN TO ACT

Concern is warranted in two opposite directions. When the artifacts stop: at thirty to forty-five days a leader running real discovery can show written patterns and name what they still need to verify. And when action outruns evidence: verdicts in week three, a reorganization in week four, the last company's playbook imported whole. Both break the compact, and both call for the same conversation about the terms that are slipping.

What to ask, and when

A standing conversation where the leader brings findings and the sponsor brings context. Neither side brings verdicts until the readout. Use these prompts; resist the urge to replace them with status questions.

DAYS 1–30 · SET THE CONDITIONS

— What has surprised you so far?
— Who has been most candid with you, and who has not?
— What are you hearing that I have stopped noticing?
— What access are you missing?

Sponsor's job this month: make the introductions personally, say candor is safe, and put the readout date in front of the board.

DAYS 31–60 · THE EVIDENCE ARRIVES

— Which patterns are recurring across unrelated conversations?
— What did you believe on day one that you no longer believe?
— What is already working that deserves to survive this transition?
— What do you still need to verify before the readout?

Sponsor's job this month: absorb the pressure for early action in public, and give context the leader cannot see from inside the function.

DAYS 61–90 · THE READOUT

— What did you hear, and what does the evidence support?
— What will you protect, and who built it?
— What are your first moves, and which finding is behind each?
— What are you still watching, with what owner and review date?

Sponsor's job this month: hold the date, judge the plan on the terms you agreed, and end the transition on purpose.

One page for the board

Boards ask for progress before there is any to report. This page gives the sponsor language that is honest about the stage without sounding like delay.

THE APPOINTMENT

Role, mandate in one sentence, start date.

THE TERMS

Discovery period through [date]. Readout scheduled for [date].

WHAT WE EXPECT AT THE READOUT

Findings, what will be protected, first moves, and the watch list.

EVIDENCE TO DATE

Conversations completed; patterns emerging; surprises worth the board's attention.

WHAT WE ARE NOT ASKING FOR YET

A transformation plan. It arrives at the readout, built on verified understanding.

THE EXECUTIVE LEARNING PATH

- This article — What Great CEOs Expect from New Leaders
- Organizational Intelligence — the cornerstone
- The Executive Listening Tour — the listening phase
- Beyond the Org Chart — the mapping phase
- Evidence-Based Alignment — the alignment phase
- From Findings to Action — the operating phase

Research: McKinsey (2018) · HBR Byford, Watkins & Triantogiannis (2017)
HBR Whitler & Morgan (2017) · Watkins, The First 90 Days (2013)