First 100 Days
Roadmap: A Guide for New-to-Role CSOs
Congratulations on your new role

You’ve transitioned into one of the most critical senior leadership roles within an enterprise — head of sales. You are a leader who must guide not only the sales function, but also the enterprise. These first few months in the role present your best opportunity to determine your agenda and establish a strong foundation for your tenure. First- and fifth-time CSOs alike trust Gartner insights, advice and tools to provide the ultimate thought partnership, mentoring and resources to navigate these early days.

New heads of sales are likely to feel immediate pressure to achieve a few quick wins. The pull of establishing a leadership team, revising the sales model and upending your predecessor’s dashboard can be daunting. “Stop. Slow down.” This was the overwhelming piece of advice your fellow heads of sales shared when compiling this guide. When asked if they could go back and do it all over again, each sales leader told us they wished they had taken more time to listen and be thoughtful and strategic with their planning. As one head of sales shared, “You have to go slow to go fast.”

Whether you are entering your first or fourth role as head of sales, this guide will provide:

- Critical reminders and a checklist for everything you need to accomplish in the first few months
- Key recommendations to help you succeed
- Everything you need to know divided into five key phases: Prepare, assess, plan, act and measure
- Actionable guidance and valuable advice from your peers for each of the five phases
- Resources to help you make the most of your first 100 days in the role and accelerate the track to success
- Perspective across the many transition challenges you will face so you can set priorities and avoid common pitfalls
Key Recommendations

To quickly maximize their influence on the sales organization and the broader enterprise, new-to-role CSOs should:

• **Mitigate transition risks** by clarifying the mandate for the role and business priorities with the CEO and/or manager. The initial (and very brief) “honeymoon” period presents a high-leverage time for CSOs to advance their agenda, so they must plan carefully, but rapidly.

• **Connect with key stakeholders** throughout the enterprise and ask them directed questions specific to their role to identify and act on opportunities for collaboration. Creating political capital and trust this way will pay off during your tenure. Our research shows that fostering strong relationships increases transition success by almost 50%.

• **Assess the sales function’s current state** and maturity to prioritize strategic improvements and determine short-term operational priorities while making the best use of limited time and resources.

• **Act to deliver collective, quick wins** to create momentum for larger strategic initiatives. Don’t move too fast, but deliberately work to (re)define operational and strategic priorities and then develop initiatives to act on these priorities.

To help new-to-role CSOs achieve success and follow these recommendations, Gartner has created the First 100 Days Roadmap (see Figure 1). This breaks down the first 100 days into five phases, each overlapping with suggested durations that you can customize.

**Figure 1**

![First 100 Days Roadmap](Source: Gartner)
First 100 Day Roadmap

Prepare
Days -10 to 15

A CSO’s first 100 days are full of opportunities to make rushed mistakes with long-lasting performance implications. However, this is also a great opportunity to learn about the organization, your peers, the commercial function, the products and your team.

Key Accomplishments:
- Develop a relationship with the CEO. Fully understand the CEO’s key concerns and ensure that sales’ initiatives align with the enterprise’s goals.
- Study the market, business model and strategy of the function and the impact the COVID-19 pandemic has had on all of these.

Assess
Days 0 to 30

The assess phase is about evaluating current sales performance, functional initiatives and structure, as well as establishing enterprise relationships and meeting with key customers to understand the current state.

Key Accomplishments:
- Conduct a listening tour, starting with top-down discussions with sales team members.
- Assess your sales team across a range of critical skills, including its ability to adapt to and perform in the new virtual environment ushered in by the COVID-19 pandemic.

Plan
Days 15 to 45

Taking into account observations about the organization’s current level of maturity, synthesize information from the assess phase and turn it into an actionable plan for specific areas of focus. Ensure that the plan includes quick wins, detailed operational plans for the next one to two quarters and long-term plans for the first six to 12 months.

Key Accomplishments:
- Create an initial strategic roadmap with a plan of action for the first 100 days and beyond, with clear priorities and milestones.
- Begin conversations with the CEO and other stakeholders, such as the head of HR, on what a return-to-work situation will look like and entail.

Act
Days 30 to 80

This is your opportunity to put plans into action and deliver visible results. Refine your team, get involved in existing projects, execute a quick win and continue communicating your plans to the CEO and/or your manager, as well as other key stakeholders, to establish formalized feedback loops.

Key Accomplishments:
- Identify and capitalize on one or more quick wins to create momentum for other, larger strategic initiatives.
- Identify opportunities to bolster the shift to a virtual sales model, ensuring you are effectively resourcing and enabling the sales force’s ability to sell in this new environment.

Measure
Days 45 to 100

The measure phase is your opportunity to start demonstrating the evidence of your influence. Share metrics, data points and anecdotal feedback showcasing the effect of your initiatives. Identify the parts of the plan that are working well — mentioning early wins and progress — and challenges that need more time or additional resources.

Key Accomplishments:
- Continuously refine your short- and long-term strategic goals and operational objectives to reflect changing market and organizational conditions, as well as new information gathered during your onboarding.
- Iterate your metrics gathering to optimize the matrix of measurements at your disposal.
Prepare Phase

Days -10 to 15

As a new leader, your first 100 days are full of opportunities to make rushed mistakes with long-lasting performance implications. However, this is also a great opportunity to learn about the organization, your peers, the commercial function, the products and your team. Regardless of your professional background, this is your best chance to gather information about your new role and/or organization.

Target Outcomes

• Alignment with the CEO and/or your manager on your core responsibilities and span of authority/control

• An understanding of the CEO's appetite for change, perception of sales' challenges and drivers of these challenges

• Identification of key stakeholders — both within and outside the sales organization — with whom you can establish a system that ensures a mutually beneficial relationship

• An understanding of how the COVID-19 pandemic has altered the strategies of the function and dynamics of the customer base, from changes in buying behavior to impacts on revenue and sales expense

Work with the CEO to maximize role clarity

Many heads of sales walk into their new role ready to put their own stamp on the commercial function. While it’s important to formulate ideas for improvement, trying to make changes based solely on your past experience will likely alienate people who can help you understand key information about the organization. Instead, embark on a learning journey to win the trust and respect of the many individuals you serve.
Actions

☐ **Meet with the CEO and/or your manager:** Discuss the role, the team and the expectations on either side.

☐ **Familiarize yourself with key stakeholders:** Learn about your functional peers and CEO by studying their backgrounds (e.g., what they’ve done and where they’ve been).

☐ **Examine the culture:** Leverage your professional network and publicly available information to learn how people outside the organization perceive your company’s culture.

☐ **Learn about the market and company:** Study the market, business model and strategy of the function and what impact the COVID-19 pandemic has had on all of them.

Communications

Success as a new CSO heavily depends on your ability to work with your team and other stakeholders throughout the organization. Begin building a strong foundation before your first day in the role.

Assess your communication skills: In all communications, resolve to follow these best practices for effective communication:

- Use business language wherever possible. Avoid detailed technical terms.
- Be brief, clear and consistent in your message across forums and audiences.
- Avoid generic statements and focus on what is specific to your organization.
- Connect plans explicitly to the strategic investment objectives of the enterprise.
- Socialize your plans with peers and business leaders and solicit feedback.

Write an introduction: Prepare introductory communication material about yourself, your background and your initial thoughts on joining the organization. Make this content as fact-based and neutral as possible and keep it short and succinct.

Draft discussion guides: Prepare guides to help you organize these critical discussions:

- **Stakeholder discussions:** Prepare a list of no more than five questions, some specific and others open-ended, which will ensure that the early stakeholder conversations yield insights beyond polite meet-and-greets.

- **Staff discussions:** Prepare a list of similar questions for your first meeting with your staff members. Ask them about their key work challenges and constraints and their perception of and satisfaction with their own team and organization.
Assess Phase

Days 0 to 30

This phase is about evaluating current sales team performance, initiatives and structure, as well as determining functional priorities to develop your strategic plan. Your chief priority at this point should be benchmarking sales’ functional maturity and developing a strategic plan to address pressing issues and achieve enterprise goals.

Target Outcomes

- Insight into the inner workings of the organization, including the organization’s culture and the group’s appetite for change
- Familiarity with the dashboards and metrics the organization uses to measure functional performance, as well as data collected about customers
- Baseline knowledge of functional maturity and performance, with an insight into critical maturity gaps and improvement opportunities
- An understanding of what key organizational and operating needs and deliverables must be addressed immediately

Assess current commercial performance

A critical element to any modern sales organization’s performance is the status of its journey to digital business transformation. We found that 66% of leaders have plans for digital business transformation, but only 11% have achieved it at scale. In fact, 57% of organizations have not yet found a starting point for digital business transformation.
Actions

☐ **Conduct a listening tour:** Connect with stakeholders throughout the enterprise, including the CEO, heads of peer functions (e.g., HR, finance, IT), direct reports and key customers (see Figure 2).

☐ **Evaluate sales budget and headcount allocation:** Become familiar with how the budget is allocated and request a three- to five-year dashboard of sales spending.

☐ **Assess current commercial performance:** Work with your sales operations team to learn about the dashboards and metrics the organization uses to measure functional performance.

☐ **Measure sales’ current maturity:** Assess the performance of your sales function across core objectives and supporting activities.

☐ **Assess organizational structure, technologies and processes:** Work with your sales operations and enablement teams to identify underutilized resources across sales enablement resources, and technologies and training programs to free up budget and improve operational efficiency.

☐ **Evaluate the current state of sales leadership and sales force talent:** Treat each interaction with a direct report as an assessment during the first few months, and for key team members, document any themes or trends you observe from your conversations.

Figure 2
Communications

**Practice active listening:** Be sure to listen carefully to each person’s response and resist the urge to start formulating plans. Use active listening techniques to get the most out of this stage. This is especially critical in any introductory meeting with customers.

**Establish your personal brand:** Consider your prior expertise and the function’s organizational role when determining which personal brand delivers the greatest benefit.

**Begin building team trust:** Build trusting relationships with your direct reports by being transparent about your expectations for the sales organization and involving the entire team in key decisions and goal setting. Assure team members that you value their feedback and insights as part of the strategic decision-making process. Consider an exercise like the one shown in Figure 3 to build a foundation for trust within your team.

**Figure 3**

**Team Exercise: Build a Foundation for Success During Your Transition**

- **Head of Sales Sets the Stage With the Team**
  - Conduct initial introductions.
  - Explain the purpose of the meeting.
  - Distribute questions for group discussion, and ask the group to elect a scribe to record answers.
  - **Time Spend:** 15 minutes

- **Unobserved Group Discussion**
  - The team spends one hour discussing the questions posed by the head of sales.
  - The scribe records answers on a flip chart.
  - **Time Spend:** One hour

- **Joint Discussion Between Head of Sales and Team**
  - The scribe presents collective input from the team; team members add color.
  - The head of sales shares their perspective and engages in two-way discussion around any issues identified.
  - **Time Spend:** 45 minutes

- **Head of Sales Incorporates Input Into Transition Plan**
  - The head of sales identifies any immediate action items that need to be added to the transition action plan.
  - **Time Spend:** 15 minutes

Source: Gartner
Plan Phase
Days 15 to 45

This phase is an exciting time for you and your team as you begin to prioritize issues, determine solutions and create a plan to execute. Taking into account observations about the organization’s current level of maturity, synthesize information from the assess phase and turn it into an actionable plan for specific areas of focus. Ensure that the plan includes quick wins, detailed operational plans for the next one to two quarters and long-term plans for the first six to 12 months. Your ability to prove the legitimacy of your plan and gain buy-in for it is dependent on how well you communicate it to the function.

Target Outcomes

- A budget plan that includes opportunities for cost reduction or reallocation
- An initial strategic roadmap with a plan of action for the remaining first 100 days and beyond, with clear priorities and milestones that take into account the observations and data collected as part of the assess phase
- Identification of “low-hanging fruit,” projects that you can address in your first 100 days for quick wins, especially with regard to the evolution of sales in a postpandemic environment (e.g., virtual/remote sales execution)

Deliver a quick win related to an enterprise strategic initiative

Quick wins for a new-to-role head of sales in the first few months can generate credibility, create momentum for larger change and positively impact team morale. In fact, our research shows that an early win can have an impact of almost 20% on new leader performance.
Actions

☐ **Set budgets:** Take another look at your operational budget for the next six months and highlight anything that has changed from the first review.

☐ **Identify required actions following a maturity assessment:** This requires a twofold approach to identify short-term changes (3 to 6 months) and longer-term changes (12 to 18 months).

☐ **Identify quick wins related to an enterprise strategic initiative:** To establish credibility quickly, identify small projects ("low-hanging fruits") bounded by time and scale that can help you make meaningful improvements to the organization.

☐ **Influence the direction of existing projects:** Collaborate with your team to determine whether existing projects are necessary or if midcourse changes are advisable.

☐ **Start planning for a postpandemic work situation:** Begin conversations with the CEO and other stakeholders such as the head of HR on what a return-to-work situation will look like and entail.

Communications

**Share your initial observations to drive awareness:** Announce your intentions regarding the sales function (and any reorganization) to the CEO and/or your manager as well as other critical stakeholders. Even if you are not planning significant changes, let them know what’s on your mind and if any changes are necessary.

**Meet with key team members to source action items:** Hold regular meetings with the sales leadership team — particularly the head of sales operations and enablement — and essential individual contributors to determine the status of any issues, related obstacles and resource gaps, and alternative resolutions.

**Schedule town hall meetings for the entire sales organization:** Update everyone in sales on your progress on the quick wins you’ve decided to pursue, in-flight projects and your vision for the function. Celebrate the successes and identify opportunities with key steps to address and turn around performance, where necessary.
Act Phase

Days 30 to 80

This is your opportunity to put plans into action and deliver visible results. Refine your team, get involved in existing projects, execute a quick win and continue communicating your plans to the CEO and/or your manager as well as other key stakeholders to establish formalized feedback loops. Watch progress closely to ensure that obstacles to execution are dealt with swiftly and continue your information gathering internally to iterate the longer-term plan.

Target Outcomes

• Quick wins that demonstrate success and create momentum for other, larger strategic initiatives (These should be a priority and should be completed within your first 90 days of being in the role)

• Designation of ownership for new strategic initiatives and successful execution of existing projects

• Continuous refinement of priorities, based on feedback from relevant stakeholders

Communicate your strategic priorities

The success of any strategic initiative, especially one involving new leadership, hinges on how it is communicated to the stakeholders who will be involved in executing it. Our research shows that staff who are effectively aligned to your strategy can have a 12% to 22% increase in performance outcomes. To capture this opportunity and align team members to your strategy, develop a formal strategy for communicating your initiatives to the broader sales force.
**Actions**

- **Operationalize quick wins:** To demonstrate your ability to act on the areas identified for improvement and garner goodwill, initiate short-term projects that address stakeholder pain points. Our research shows an early win can have an impact of almost 20% on new leader performance.

- **Refine your team:** This is your opportunity to recognize strengths, capitalize on motivational factors, make changes to the team structure (if necessary) and enable each of your leaders to achieve the highest possible level of performance.

- **Carefully select and meet with owners of new strategic initiatives:** Clearly communicate expectations and timelines, including how the success or failure of the initiative will be measured.

- **Get involved in existing projects:** You should have only two objectives in this process: To keep the teams focused on the business value of their projects and to prompt the team members, when necessary, to keep their execution crisp, smooth and effective.

- **Identify opportunities to bolster the shift to a virtual sales model:** Ensure you are effectively resourcing and enabling the sales force’s ability to sell. Offer to help with struggling accounts where a top-to-top meeting could provide a lift to the relevant sales team.

**Communications**

- **Develop a formal strategy for communicating your initiatives:** Our research shows that staff members who are effectively aligned to your strategy can have a 12% to 22% increase in performance outcomes.

- **Communicate regularly with the CEO, your direct reports and key stakeholders:** Determine, together, what actions to initiate, speed up, continue, slow down or stop during the next 60 days.

- **Clarify team roles and objectives:** Ensure that all sales employees know the specific responsibilities and goals they will be evaluated against.
Measure Phase
Days 45 to 100

The measure phase is your opportunity to start demonstrating the evidence of your influence. Share metrics, data points and anecdotal feedback showcasing the effect of your initiatives. Identify the parts of the plan that are working well — mentioning early wins and progress — and challenges that need more time or additional resources.

Target Outcomes

- Assessment of outcomes related to your plan goals
- Evidence of early feedback and quick wins for your CEO/manager and other relevant stakeholders
- Use of metrics you already have to kick-start a process of continuous improvement and identification of new metrics to begin gathering
- Continuous refinement of short- and long-term strategic goals and operational objectives

Measure progress against strategic priorities

Carefully monitoring progress against your initiatives is critical. Meet with initiative owners frequently during execution and circle back upon completion. Ideally, initiative owners will have the autonomy to execute on their projects, but can offer guidance and feedback where necessary throughout the execution process, ensuring that your team members are clear on expectations and timelines.
Actions

☐ **Execute postmortem reviews**: When wrapping up an initiative, review the goals and outcomes with the owner. Discuss any shortcomings and identify opportunities to improve the process for the next initiative.

☐ **Summarize outcomes and key findings**: Toward the end of your first 100 days, prepare a short presentation for your CEO and/or manager and team that tells the summarized story of your project outcomes and key findings.

☐ **Iterate your metrics gathering**: It is said that every answer leads to another question, and this is certainly true with respect to business metrics. Perhaps a problem that you could have found earlier will lead to tracking a new metric to detect the same problem in future initiatives.

☐ **Update and adjust your future plans**: After one quarter of execution, use what you’ve learned about internal procedures, team capabilities and organizational dynamics to update your future plans and goals.

Communications

**Regularly communicate the status of projects**: Establish a reporting mechanism for your stakeholders that provides an appropriate level of detail for sales initiatives.

**Highlight quick wins**: Share the quick wins with your manager and stakeholders. Although it may be too early to obtain well-documented feedback about all of your initiatives, there may be some news you can share based on informal conversations you’ve had with team members.

**Promote your team’s successes**: Don’t count on your team’s accomplishments to filter through the organization on their own. Rather, send email updates or consider launching internal marketing campaigns to commend some of the initiatives and successes of their owners.

Conclusion

The tools and guidance within these five key phases will equip heads of sales with the knowledge they need to succeed. Remember that while the first 100 days are critical, they are only the beginning. Heads of sales should continue to prepare, assess, plan, act and measure throughout their tenure as they work to achieve success and drive growth.
Get support throughout your transition and beyond

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