

90-Day Operating Improvement Playbook

A phase-by-phase plan for establishing a baseline, aligning priorities and ownership, and putting an operating rhythm in place.

- DAYS 1–30** Assess the business and establish a baseline
- DAYS 31–60** Align priorities, ownership, KPIs, and execution
- DAYS 61–90** Implement an operating rhythm and measure results

Ninety days to a business that runs on purpose

Most operating problems aren't solved by a single big decision. They're solved by getting a clear view of the business, agreeing on a short list of what matters, and then building the habits that keep everyone working on it. Ninety days is long enough to do that properly and short enough to keep the urgency.

This playbook is written for CEOs, owners, new operating executives, and private equity or board sponsors who want to improve how a business runs. It works for a new leader in their first quarter, a management team that knows things should run better, or a portfolio company after an acquisition.

Who leads it	The CEO or the senior operating executive. It can be supported by finance, a chief of staff, or an outside advisor, but it can't be delegated entirely.
Who's involved	The leadership team throughout, and managers one level down during the assessment and when rolling out the operating rhythm.
Time required	Roughly a day a week for the leader, and a few hours a week for each member of the leadership team. More in the first 30 days.
What you end up with	A shared baseline, three to five priorities with owners and measures, a weekly scorecard, and a meeting rhythm that keeps all of it moving.

The three phases

Days 1–30	Assess the business and establish a baseline Understand how the business actually runs today, using facts rather than impressions, and agree on that picture with the leadership team.
Days 31–60	Align priorities, ownership, KPIs, and execution Turn the assessment into a short, owned plan: three to five priorities, a single owner for each, a measure of success, and the KPIs the leadership team will review every week.
Days 61–90	Implement an operating rhythm and measure results Put in place the recurring meetings, reviews, and reports that keep priorities moving and catch problems early, then measure what changed against the day-30 baseline.

Each phase includes a week-by-week plan, a checklist, an illustrative example, the deliverables to produce, and the most common pitfalls. The checklists are designed to be printed and worked through with your leadership team.

Assess the business and establish a baseline

Goal. Understand how the business actually runs today, using facts rather than impressions, and agree on that picture with the leadership team.

Why it matters. Teams that skip the assessment usually end up fixing the most visible problem rather than the most important one. A shared baseline also gives you something to measure progress against at day 90.

Week by week

Week 1	Listen and gather. Meet each leadership team member one on one. Ask the same questions of each: what's working, what isn't, what would you change first, and what does nobody talk about? Request the last 12 months of financials, the budget, the sales pipeline, and any existing KPI reports.
Week 2	Go to the work. Spend time with customers, frontline staff, and the people who run core processes. Follow a sale from first contact to cash collected. Note where work waits, gets redone, or depends on one person.
Week 3	Build the fact base. Rebuild the numbers you need if they don't already exist: margin by product or customer, a 13-week cash view, customer concentration, pipeline conversion, and on-time delivery. Rough and right beats precise and late.
Week 4	Agree on the picture. Write a short assessment, five pages at most, and review it with the leadership team in a working session. The aim is agreement on the facts and the five to eight biggest issues, not on solutions yet.

Checklist

- ☐ One-on-one conversations held with every member of the leadership team
- ☐ Conversations held with at least five customers and a cross-section of frontline staff
- ☐ Last 12 months of financials reviewed against budget, by month
- ☐ Gross margin understood by product, service line, or customer segment
- ☐ 13-week cash forecast in place, even if simple
- ☐ Customer concentration and key-person dependencies listed
- ☐ Sales pipeline reviewed: stages, conversion rates, and forecast accuracy
- ☐ Core processes mapped at a high level, with the main bottlenecks noted
- ☐ Existing meetings, reports, and decision forums listed, with who attends and what they decide
- ☐ Written assessment reviewed and agreed with the leadership team

ILLUSTRATIVE EXAMPLE (FICTIONAL)

A founder-led services company with about 120 employees has grown revenue steadily, but margins have slipped for three years running. In the first month the new COO finds that gross margin is tracked only in total. Once rebuilt by service line, one line turns out to be roughly break-even and growing fastest. The leadership team had sensed a margin problem but had been debating pricing across the board. The assessment refocuses the discussion on one service line and how it is scoped and delivered.

Deliverables by day 30

Baseline scorecard	The 10 to 15 numbers that describe the business today, with current values.
Written assessment	Five pages at most: what's working, the biggest issues, and the evidence for each.
Issues list	The five to eight issues the leadership team agrees matter most, in rough priority order.
13-week cash forecast	Updated weekly from here on.

Common pitfalls

- Jumping to solutions in week one. Early ideas are useful; write them down and test them later.
- Relying only on the leadership team's view. The frontline and customers usually see problems first.
- Waiting for perfect data. If a number doesn't exist, estimate it and note how.

Align priorities, ownership, KPIs, and execution

Goal. Turn the assessment into a short, owned plan: three to five priorities, a single owner for each, a measure of success, and the KPIs the leadership team will review every week.

Why it matters. Most businesses have plenty of initiatives and not enough focus. This phase is about choosing, and choosing means deciding what not to do as much as what to do.

Week by week

Week 5	Choose the priorities. Hold a half-day leadership session to pick three to five priorities for the rest of the year from the issues list. For each, write one sentence on what success looks like and why it matters now.
Week 6	Assign owners and plans. Give each priority one owner. Each owner writes a one-page plan: the outcome, three to five milestones with dates, the resources needed, and the measure that shows it's working.
Week 7	Build the scorecard. Agree on eight to twelve weekly KPIs that show whether the business is on track. Give each a definition, an owner, a target, and a data source. Start reporting it, even manually.
Week 8	Stop things. Review every initiative and recurring project already under way. Anything that doesn't support a priority is paused, scaled back, or stopped. Tell the organization what changed and why.

Checklist

- ☐ Three to five priorities chosen and written down, each with a definition of success
- ☐ One named owner for each priority, not a committee
- ☐ A one-page plan for each priority, with milestones and dates
- ☐ Weekly scorecard of 8 to 12 KPIs defined, each with an owner, target, and data source
- ☐ Status thresholds agreed for each KPI: on track, watch, off track
- ☐ Budget and hiring plan checked against the priorities
- ☐ Initiatives that don't support a priority paused or stopped
- ☐ Priorities shared with managers, with the reasoning behind them
- ☐ Leadership roles and decision rights clarified where they overlap

ILLUSTRATIVE EXAMPLE (FICTIONAL)

Following the assessment, the same services company picks four priorities: fix margin in the underperforming service line, put a 13-week cash forecast and monthly close in place, tighten pipeline stage definitions, and hire an operations lead. The scorecard has ten weekly measures. To make room, two internal projects are paused, a new office fit-out and a website redesign, and the reasons are shared at an all-hands meeting.

Deliverables by day 60

Priority plan	Three to five priorities, each with an owner, measure, milestones, and dates, on one or two pages.
Weekly scorecard	Eight to twelve KPIs with definitions, owners, targets, and thresholds. The CEO Weekly Operating Dashboard is a ready-made starting point.
Stop list	Initiatives paused or stopped, and the reason for each.
Communication	A short message to the organization explaining the priorities and what changed.

Common pitfalls

- Choosing too many priorities. If everything is a priority, the team will default to whatever is loudest that week.
- Shared ownership. Two owners usually means each assumes the other is driving.
- Building a scorecard nobody acts on. Every KPI should be able to change a decision.

Implement an operating rhythm and measure results

Goal. Put in place the recurring meetings, reviews, and reports that keep priorities moving and catch problems early, then measure what changed against the day-30 baseline.

Why it matters. Plans fade without a rhythm. A consistent cadence of weekly, monthly, and quarterly reviews is what turns a 90-day effort into how the business runs.

Week by week

Week 9	Launch the weekly meeting. Start a weekly leadership meeting of 60 to 90 minutes with a fixed agenda: scorecard exceptions, priority updates, open actions, and decisions needed. Send status updates in writing beforehand so the meeting is spent on problems and decisions.
Week 10	Add the monthly and quarterly reviews. Set a monthly business review covering financials against budget, priority progress, and people. Schedule the first quarterly priorities review. Put the full calendar in place for the next two quarters.
Weeks 11–12	Push the rhythm down. Help each leader set up a similar weekly rhythm with their own team, using the same scorecard logic. Track actions and decisions in one place, and review overdue items first in every meeting.
Week 13	Measure and reset. Compare the scorecard to the day-30 baseline. Review each priority: done, on track, or needing a reset. Hold a short retrospective on the process itself, and decide what the next 90 days should focus on.

Checklist

- ☐ Weekly leadership meeting running, with a fixed agenda and written pre-reads
- ☐ Action and decision log in use, with overdue items reviewed first each week
- ☐ Monthly business review scheduled and held at least once
- ☐ Quarterly priorities review on the calendar for the next two quarters
- ☐ Each leader running a weekly rhythm with their own team
- ☐ Scorecard updated by the same person, at the same time, every week
- ☐ Day-90 comparison against the baseline completed
- ☐ Retrospective held, and the next 90-day focus agreed

ILLUSTRATIVE EXAMPLE (FICTIONAL)

In the services company, the weekly leadership meeting replaces three overlapping status meetings. By week 13 the scorecard shows on-time delivery up and the 13-week cash forecast being used to time a hire. Margin in the problem service line has started to improve but isn't yet at target. That stays a priority for the next 90 days, while pipeline definitions are marked complete and rolled into the weekly review.

Deliverables by day 90

Operating calendar	Weekly, monthly, and quarterly meetings, with purpose, attendees, agenda, and inputs for each.
Action and decision log	One place where commitments and decisions are recorded and reviewed.
Day-90 review	Scorecard against baseline, status of each priority, and lessons learned.
Next 90-day plan	Priorities for the next quarter, carried forward, reset, or new.

Common pitfalls

- Turning the weekly meeting into a round of status updates. Updates go in writing; the meeting is for exceptions and decisions.
- Letting the rhythm slip when things get busy. Busy weeks are when it matters most.
- Declaring victory on activity rather than results. Compare outcomes to the baseline, not to the plan.

The operating rhythm

By day 90 the business should be running on a predictable calendar. Each meeting has a distinct purpose, so none of them becomes a catch-all.

Forum	Length	Focus
Weekly leadership meeting	60–90 minutes	Scorecard exceptions, priority updates, open actions, decisions needed.
Monthly business review	2–3 hours	Financials vs. budget and forecast, priority progress, people, customers.
Quarterly priorities review	Half day	Results vs. plan, priorities confirmed, changed, or retired, next-quarter focus.
Annual planning	1–2 days	Strategy, annual priorities, budget, organization.

Perspective

WHAT I'VE SEEN IN PRACTICE

Improvement comes from rhythm, not from the plan.

The plans management teams write in a first 90 days are usually sensible. What separates the ones that work is whether anything changes about how the leadership team spends its week.

A short list of priorities, a scorecard reviewed every week, and an action log with owners and dates will outperform a far more sophisticated plan that gets reviewed once a quarter.

WHERE COMPANIES GET THIS WRONG

Skipping straight to the plan.

- **Solving before diagnosing.** The assessment phase gets cut short because everyone already “knows” the problem.
- **Adding without subtracting.** New priorities go on the list, but nothing comes off it.
- **Building a reporting project.** Weeks go into perfecting a dashboard before anyone has used a rough one to make a decision.
- **Leaving managers out.** The leadership team aligns, but the people doing the work hear about it secondhand.

WHAT I'D DO FIRST

Book the weekly meeting before you have the plan.

Put a recurring weekly leadership meeting on the calendar on day one, even before the assessment is done. Use it to review what you're learning and to keep a simple action log.

By day 60, when the priorities and scorecard are ready, the habit already exists. The hardest part of an operating rhythm is starting it, and that's easier when there is no plan to perfect first.

After day 90

- Repeat the cycle each quarter: a short reassessment against the scorecard, priorities confirmed or reset, and the rhythm kept intact.
- Retake the Business Operating Health Assessment with the leadership team every 90 days, and look for movement in the areas you worked on.
- Retire scorecard measures nobody acts on, and add ones that would have caught recent problems earlier.

Want help putting this into practice?

These resources are designed to help you identify opportunities and move your business forward. If you'd benefit from an experienced operator's perspective, I'm happy to compare notes.

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The examples in this playbook are illustrative composites created for explanation. They do not describe any specific company or engagement. This playbook is general guidance, not professional advice for any particular business.