

Your first ninety days.

You will have to sign your name to a number before you have had time to verify it. This is the shortest path to finding out what is actually there — sixteen checks, in the order they pay off, finishable inside one forecast cycle.

DAYS 1–15 WHAT IS REAL

- ☐ **Pull every open deal with no next step and no activity in 21 days.**
Whatever that number is, it is the part of the forecast nobody has told you about yet.
- ☐ **Ask each rep which deal they'd bet their own money on.**
Compare that list to what the CRM says is closing. Where the two disagree, assume the CRM is wrong before you assume the rep is.
- ☐ **Read the last twenty emails your team actually sent.**
The sent folder, not the templates. It is the fastest way to hear how your company sounds to a buyer.
- ☐ **Count the closed-lost nobody has spoken to since.**
Deals that lost on timing, budget or a champion leaving are the cheapest pipeline you will find this quarter.

DAYS 16–45 WHAT IS MISSING

- ☐ **Ask three reps what “qualified” means.**
Three different answers means you don't have stages, you have labels. Everything you forecast sits on top of this.
- ☐ **Trace one deal end to end and mark every place a human retyped something.**
Each of those is a place the record quietly stops matching what happened.
- ☐ **Find out whether follow-up is a system or a personality.**
If one rep is the only one who never lets a thread go quiet, you don't have a follow-up process. You have one conscientious person.
- ☐ **Ask how many target accounts your team can give a reason for.**
Named accounts with a written reason are a list. The rest is a database.

DAYS 46–90 WHAT COMPOUNDS

- ☐ **Pick one number and publish it weekly — same definition, same source, same day.**
The definition matters more than the number. Change it later and you lose the only trend line you have.
- ☐ **Make next step mandatory on every open deal.**
The cheapest piece of forecast discipline that exists, and the one that survives you being out for a week.
- ☐ **Fix the inputs before you add headcount.**
Every seller you hire multiplies whatever is already there. If what's there is a blank page, you are multiplying a blank page.
- ☐ **Write three customer stories in the buyer's words.**
What they were doing before, what changed, what it was worth. Your team is currently improvising these on live calls.
- ☐ **Decide what the team stops doing.**
Your first quarter is the only one where removing something costs you nothing politically. It gets expensive in month four.

WHAT NOT TO DO FIRST

- ☐ **Don't rebuild the CRM in month one.**
You'll spend the quarter designing a system before you know how you intend to sell.
- ☐ **Don't replace people before you've replaced the inputs.**
A rep working a bad list underperforms long before a rep working a bad quota does.
- ☐ **Don't commit to a number you can't trace to its source.**
You only get to be new once. Use it to ask where a figure comes from.

90 days

ONE FORECAST
CYCLE

Nothing on this list requires budget, a new tool, or anyone's permission — which is the point. It is designed to be finished before your first full quarter closes, so the number you commit to is one you have actually checked. **The gaps it finds are almost always the same four:** the list, the follow-up, the stage definitions, and a weekly number nobody trusts.