

CMO first 90-day plan template

Overview

This template is designed to help new Chief Marketing Officers (CMOs) navigate their first 90 days in a new role. It's structured around the key objectives: listen, learn, align, plan, and start executing with intent. Each section includes a rationale to help you understand why the activity matters.

0–30 days: Listen & learn

You only get one chance to see things with fresh eyes. This is your time to absorb context, understand team dynamics, and spot what's working or broken.

Goals:

- Build relationships with the exec team and cross-functional leads
- Understand company mission, roadmap, and growth goals
- Conduct a full audit of marketing, product, and sales
- Gather feedback from the team

Activities:

- 1:1s with CEO, CRO, Product, Sales, CS, HR
- Review brand positioning, campaigns, pipeline data, team org chart
- Shadow sales calls
- Read through past OKRs, GTM plans, and customer research

Outputs:

- Marketing auditsSummary
 - Relationship map
 - Team strength/gap analysis
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Orientation & audit (days 1-15)

Purpose: Gain context, identify what's working, and where gaps exist.

What to do:

- Hold 1:1s with the CEO, CRO, CPO, CFO, and HR
- Review prior OKRs, growth plans, brand guidelines, customer research
- Audit current performance: funnel metrics, content, campaigns, org structure
- Shadow sales calls and onboarding demos
- Interview team leads and ask, "What should we stop, start, or continue?"

Deliverables:

- Org & channel audit summary
 - Key gaps/opportunities doc
 - List of quick wins or high-impact experiments
 - Relationship map for internal stakeholders
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Stakeholder mapping & influence plan (days 1-30)

CMOs succeed through influence. Map your key internal relationships early and build strategic alliances.

1. Identify your core stakeholders

These are the people whose support, collaboration, or resistance will shape your ability to succeed. Prioritise:

- Executive peers (CEO, CRO, CPO, CFO, CTO)
- Functional leaders (Sales, Product, CS, RevOps, HR)
- Influencers (founders, board members, long-timers, internal 'gatekeepers')

Tip: Ask your CEO or Chief of Staff, "Who do I need to win over or stay close to?"

2. Understand their goals and pressures

Book early 1:1s and listen. Your aim: understand what success looks like for them – and how marketing can help them get there.

Ask questions like:

- “What are you being measured on this quarter?”
- “Where do you think marketing can support you better?”
- “What’s worked well in the past, and what’s frustrated you?”

Goal: Find the overlap between their priorities and your capabilities.

3. Assess relationship strength and influence

Build a matrix with these dimensions:

Stakeholder	Power/influence	Support level	Relationship strength	Next step
CRO	High	Neutral	Early-stage	Co-create pipeline goals
CPO	Medium	Low	Weak	Join roadmap meetings
CFO	High	Unknown	Weak	Share budget impact wins

This helps you prioritise your time and plan intentional touchpoints.

4. Establish your influence strategy

Think of this like a personalised stakeholder engagement plan:

Stakeholder	Strategy	Tactics
CEO	Alignment & confidence	Weekly updates, strategy deck previews
CRO	Partnership on pipeline	Joint dashboards, regular QBRs
CPO	Trusted GTM input	Messaging workshops, beta feedback loop
CFO	Budget credibility	ROI reporting, phased budget asks

Tip: Show up with insights, not asks. You'll build trust faster.

5. Stay visible & communicate wins

Influence isn't just meetings – it's narrative control.

- Share early wins cross-functionally
- Be proactive in company meetings or Slack
- Elevate your team's contributions (not just your own)
- Send regular, transparent updates ("Here's what we're seeing, here's what's next")

Tip: Frame everything in business impact, not marketing metrics.

Summary checklist:

- ☐ Mapped out key stakeholders by power and alignment
 - ☐ Held intro 1:1s with every exec peer
 - ☐ Documented mutual priorities
 - ☐ Created an influence plan with clear next steps
 - ☐ Started showing quick, relevant wins tied to their goals
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Marketing health snapshot dashboard (start by day 15, finalise by day 30)

This dashboard gives you – and your exec team – a clear, honest picture of where marketing stands today. It's not a performance brag sheet. It's a baseline. A pulse check. Something to build *from*, not be judged *by* in your first month.

What to include and why:

1. Funnel metrics (performance & velocity)

Track how leads are moving through the funnel – and where they stall.

Stage	Volume	Conversion rate	Time in stage
Web visitors	120,000	–	–
MQLs	6,000	5%	–
SQLs	2,400	40%	4 days
Opportunities	1,000	41.7%	6 days
Closed/won	320	32%	10 days

Why it matters: Shows where you're leaking pipeline and what's causing friction.

2. Channel-level performance

Channel	Spend	Leads	CPL	Pipeline (\$)	ROI/ROAS
Paid search	\$40k	700	\$57.14	\$250k	6.3x
Paid social	\$30k	850	\$35.29	\$300k	10x

SEO	\$10k	1,200	\$8.33	\$180k	18x
Events	\$25k	300	\$83.33	\$100k	4x

Why it matters: Helps you see which levers are efficient – and which are overfunded or underperforming.

3. Content & website metrics

Metric	Current	Trend YoY
Blog traffic (monthly)	35,000	+22%
Average time on page	2:14	+12%
Top-performing content piece	"ROI Calculator Tool"	-
SEO keyword wins	65 keywords in top 10	-4%

Why it matters: Shows whether your content engine is attracting and engaging the right audience.

4. Brand & awareness

Metric	Value	Benchmark/trend
Branded search volume	4,200/month	18% QoQ
Share of voice (LinkedIn)	12%	Industry avg: 9%
Press mentions/earned media	4 last Q	-2 QoQ

Direct traffic	11,000/month	+25% YoY
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Why it matters: Measures brand presence and recall – often overlooked but critical for long-term growth.

5. Team & operational health

Area	Snapshot
Team size/open roles	8 marketers, 2 open roles
Skill gaps	No true Lifecycle or RevOps resource
Tooling stack health	Working, but poor integration across tools
Campaign cadence	~1 major/month; no real evergreen system

Why it matters: Even a solid strategy won’t go far if the team’s overstretched, under-supported, or under-equipped.

How to build it

- Create a simple dashboard in Google Sheets, Notion, Airtable, or your BI tool
- Focus on clarity, not volume – this isn’t about showing everything, it’s about showing what matters
- Review weekly for your own awareness, monthly with your CEO or ops lead

Tips:

- Keep one tab for raw data, one for snapshot charts
- Highlight 2–3 “at a glance” takeaways at the top of the dashboard
- Share it early to show you’re not guessing – you’re measuring

Learning & industry immersion

In the first 90 days, it's tempting to live in dashboards, internal docs, and Slack. But real insight – the kind that sharpens positioning, inspires campaigns, and aligns teams – comes from the outside.

CMOs who lead with market insight gain trust faster, make better bets, and build stronger narratives.

Your learning objectives

- Understand how your customers think, talk, and buy
- Map your category and competitive dynamics
- Identify emerging trends shaping your space
- Spot misalignments between internal assumptions and market reality

Tactics to accelerate marketing learning

1. Talk to customers (first 3–5 conversations)

Don't ask for feature feedback – ask for story insight.

Ask questions like:

- Why did you start looking for a solution like ours?
- What made you hesitate before buying?
- What was happening in your business that made this urgent?
- What do you tell others about us?
- What do you wish we talked more about?

***Deliverable:** A short write-up of insights, quotes, and repeated patterns.*

2. Study competitors

- Review their homepages, feature pages, blog posts, webinars

- Read G2/Trustpilot reviews (esp. negative ones)
- Analyse their positioning – what story are they telling?
- Sign up for their nurture emails
- Attend a sales demo as a “prospect” if you can

Then create a short doc/table with:

Competitor	Key message	Strengths	Gaps	What we can learn

Deliverable: A competitor messaging matrix or narrative teardown.

3. Follow industry voices & content

- Subscribe to top newsletters (e.g. industry-specific Substacks, SaaS Brief, TechCrunch, Martech Today)
- Follow relevant influencers, VCs, founders, and analysts on LinkedIn
- Set up Google Alerts for category keywords and key competitors
- Read analyst reports, if available (e.g. Gartner, Forrester, etc.)

Deliverable: A Notion or doc page with key articles, commentary, and POV snippets.

4. Sit in on sales & CS calls

- Listen for real language buyers use to describe problems
- Note what resonates most during the pitch
- Watch how sales reps position against competitors
- Learn where CS is dealing with confusion or unmet expectations

Deliverable: A “Voice of the Customer” insight bank – gold for messaging and content.

Tips:

- Don't try to boil the ocean – five or six customer calls and three competitor teardowns is enough to get you started
 - Prioritize learning over judging – you're building context, not fixing yet
 - Share your insights back with the team – they'll appreciate your outside-in perspective
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31–60 days: Align & strategize

This is where you move from learning to leadership. You start forming your POV, aligning with peers, and signaling where you're taking the team.

Goals:

- Define short- and long-term marketing priorities
- Align on success metrics with exec team
- Build credibility and show quick wins

Activities:

- Host marketing team offsite or reset session
- Present high-level strategy draft to execs for feedback
- Prioritise quick-win campaigns to build momentum

Outputs:

- Draft marketing strategy (12-month outlook)
 - Budget and resourcing asks
 - Quick-win campaign results
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Team alignment workshop (days 31–40)

Purpose: Reset priorities, clarify goals, and create a sense of shared momentum

What to do:

- Run a 2–3 hour session with the full marketing team (remote or in-person)
- Share your perspective from the first 30 days
- Workshop: “What are we trying to achieve this year?”
- Discuss: What’s working / not working / what’s missing
- Align on marketing’s role in company success

Structure:

1. Welcome and what I’ve learned
2. Company and marketing strategy context
3. Team breakout: SWOT, gaps, wins
4. Goal and role alignment
5. Define first experiments or campaigns

Deliverables:

- Shared doc of priorities and goals
- Aligned roadmap draft
- Boost in morale and clarity

Narrative & messaging reality check (days 20–45)

You might inherit messaging that sounds good but falls flat in the market – or worse, means different things to different teams.

Before you scale campaigns or rewrite positioning, you need to answer two questions:

1. Is our story resonating with real buyers?
2. Are we telling a consistent story across the company?

Step 1: Interview internally (Sales, CS, Product)

Hold short 1:1s or run a workshop with internal stakeholders. Use open-ended questions like:

- What's the elevator pitch you use with customers?
- What objections come up most often?
- What parts of our message feel unclear, dated, or generic?
- Where are we saying different things across teams?

What you're looking for:

- Misalignment between how you describe the product and how it's actually sold
- Hidden insights into how buyers really talk and think

Step 2: Talk to a few customers

Pick a mix of power users, new customers, and even lost deals. Keep it informal – a 20-minute call works.

Ask questions like:

- What first drew you to us?
- What almost stopped you from buying?
- How would you describe our product to a colleague?
- What problems did we really help you solve?

What you're listening for:

- Language and metaphors they use
- Gaps between your value prop and their lived experience
- What they believe about your brand

Step 3: Review your messaging surfaces

Audit these core assets with fresh eyes:

- Homepage and landing pages
- Sales decks and outreach emails
- Ad headlines and value props
- Social bios and thought leadership
- Product UI copy (onboarding, nav, etc.)

Area

Red flags

Clarity	Are we assuming too much knowledge?
Consistency	Do we tell the same story in sales and marketing?
Relevance	Are we solving a <i>today</i> problem, or a vague one?
Differentiation	Could this message belong to any competitor?

Deliverables you can create on the back of this phase:

- **Messaging alignment audit:** A quick table that outlines inconsistencies, gaps, or unclear phrasing across teams.
- **Customer language bank:** A doc where you collect phrases, metaphors, objections, and “Aha” moments from customers – gold for writing copy and GTM.
- **Early hypothesis of your strategic narrative:** Draft a rough version of the “We believe...” story from your narrative framework using real buyer language.

And here’s an example of what you might discover during this phase:

- Before:** “We help companies build scalable infrastructure for asynchronous collaboration.”
 - Customer says:** “Honestly, it just stopped all the Slack chaos.”
 - After:** “Replace Slack chaos with structured async work.”
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Strategy development (days 30-60)

Purpose: Create a clear 12-month marketing strategy aligned to company objectives.

What to do:

- Define strategic pillars (e.g. brand, demand, product marketing)
- Draft narrative and positioning that ties it all together
- Align with CEO and sales leadership on shared outcomes

- Build in team structure, channel mix, and high-level budget

Must include:

- What you're solving for (business context)
- Key objectives and KPIs
- Channel and team strategy
- Timeline and measurement plan

Deliverables:

- 12-month strategy deck
- Short summary to share across the business
- Roadmap that maps initiatives by quarter

Internal comms plan (design by day 30, start rolling out by day 40, then ongoing)

As a CMO you're not just leading campaigns, you're shaping the marketing culture within your org.

Your internal presence will influence how people trust you, follow your direction, and buy into the marketing vision. Especially in your first 90 days, clear, honest communication builds credibility, calm, and momentum.

What you're aiming to do here:

- Make your leadership visible
- Set expectations without overwhelming the team
- Reinforce direction and purpose
- Keep execs and cross-functional teams informed on marketing progress

Key internal communication rituals to consider:

Format	Purpose	Frequency	Notes
Weekly team memo	Recap key activities, wins, focus areas	Weekly (Friday or Monday)	Short, skimmable – sets the rhythm
Monthly all-marketing meeting	Align everyone on priorities, celebrate wins	Monthly	Can include metrics, shoutouts, roadmap updates
Exec update (Slack/email)	Keep C-suite in the loop on progress & challenges	Biweekly or monthly	Include metrics, what's working, key blockers
Cross-functional digest	Share key updates with Sales, CS, Product	Monthly or quarterly	Helps other teams connect the dots
"Open office" time	Casual, drop-in style for team questions	1–2x per month	Builds psychological safety and informal trust

Example: Weekly team memo template

Subject: Weekly marketing recap – [Week # / Month]

1. This week's wins:

- Launched [campaign name]
- Hit [milestone]
- Shoutout to [teammate] for [contribution]

2. Focus for next week:

- [Top priorities]

3. Quick metrics check-in:

- [Metric] = [X% up/down]
- [Pipeline influenced / leads generated]

4. Blockers/needs:

- Need input from [X team] on [Y]
- Waiting on [dependency]

5. Final thought:

(End with a note of appreciation or something human – e.g., “Take time to breathe this weekend”)

How to set the tone as CMO

- Be transparent about what you’re learning and still figuring out
- Avoid marketing-speak – use plain English
- Celebrate the team publicly, give feedback privately
- Share small wins early – they build energy
- Make people feel safe asking questions or admitting uncertainty

Watch out for:

- Going quiet during change – silence breeds uncertainty
- Over-updating without clarity – people need direction, not noise
- Speaking only to execs – if your team’s in the dark, morale drops fast

Deliverables you can create during this stage:

- Internal comms calendar (with your recurring touchpoints)
- Weekly memo template (Google Doc or Notion format)
- Stakeholder update deck template (for board/exec alignment)

Learning & industry immersion (continued)

[Please refer to the previous section](#)

61–90 days: Execute & embed

This phase is all about earning trust through execution. You’re laying the foundation for long-term growth by creating rhythm, alignment, and showing results.

Goals:

- Begin executing core strategy
- Build an operating rhythm for the team
- Embed narrative and direction across functions

Activities:

- Launch key campaigns or GTM motions
- Establish team rituals (standups, reviews, retros)
- Kick off hiring processes if needed
- Meet with top customers or advocates

Outputs:

- Final marketing strategy deck
 - Updated org structure or hiring plan
 - OKRs for the next quarter
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Campaign execution (days 45-90)

Purpose: Prove early value through quick wins and executional clarity

What to do:

- Launch a targeted campaign with measurable outcomes (e.g., gated content, lead gen, brand launch, partner event)
- Focus on speed and signal: prove marketing is already driving momentum
- Test messaging and refine positioning based on performance

Tips:

- Choose one to two channels max – don't spread yourself or the team too thin
- Align with sales or product for maximum visibility
- Publicize wins (internally and externally)

Deliverables:

- Campaign results and learnings
- Performance dashboard
- Early proof that strategy has traction

Team operating rhythm (days 60–90 (then ongoing))

Purpose: Build structure, clarity, and accountability into the team’s week

What to do:

- Introduce team standups, weekly planning, and monthly retros
- Define shared OKRs
- Create a shared marketing calendar
- Clarify role expectations and decision-making flows

Suggested rhythm:

Cadence	Meeting	Purpose
Daily/twice weekly	Standup (15 mins)	Stay aligned, unblock work
Weekly	Team sync (30–45 mins)	Review priorities and metrics
Monthly	Marketing retro	What worked, what didn’t
Quarterly	OKR review/planning	Align on outcomes

Final strategy & hiring plan (complete by day 90)

Purpose: Lock in your go-forward plan and resourcing to execute it

What to do:

- Finalise your strategy deck with CEO input
- Outline critical hires and rationale (tie to objectives)
- Collaborate with finance/HR on timing and budgets
- Show how the team is evolving to meet company goals

Tips:

- Don't just ask for headcount – justify it with business cases
- Consider phased hiring tied to revenue or OKRs
- Identify what to hire vs outsource

Deliverables:

- Final strategy presentation
- Hiring roadmap and job description drafts
- Budget justification slide or doc

90-day outcomes scorecard (build skeleton by day 30, fill in incrementally, finalize by day 85–90)

In your first 90 days, perception matters as much as performance.

This scorecard gives your CEO and leadership team a simple, outcome-focused view of what you've achieved – and where you're heading next. It reinforces that you're not just "settling in," but delivering, aligning, and leading.

It also builds trust and shows you're measuring yourself just like the rest of the exec team.

Outcome	Status	Notes
Team structure reviewed & refined	✓	Hired 1, redefined 2 roles
Strategy presented to the exec team	↺	Draft done, feedback booked
3 quick-win campaigns shipped	✓	Drove \$350k in pipeline
Baseline metrics dashboard created	✓	Weekly review cadence started
Stakeholder influence map created	✓	Ongoing 1:1s with CRO, CPO, CFO
Messaging audit completed	✓	Found 3 major inconsistencies – plan in motion
Customer interviews completed	✓	5 insights shared with GTM teams
Marketing team engagement check-in	↺	Running pulse survey next week
Hiring plan for Q2 submitted	✓	Roles scoped and in pipeline

Learning & industry immersion (final insights)

[Please refer to the previous section >](#)