HR² Advisory

TEMPLATE FOR PE SPONSORS AND CEOS

The 100 Day People Plan

A working template to test whether your leaders, organization and pay system can deliver the value creation plan, and to agree what to fix in the first 100 days after a deal, a carve out, a merger or a leadership change.

COMPANY _____ PLAN OWNER _____ DAY 1 DATE _____

Free to use and adapt inside your organization

OVERVIEW

Six worksheets, one plan, 4 to 6 weeks.

Work through the worksheets in order. Each one answers a single question about whether the people side of the business can deliver the plan. The last worksheet turns the answers into a 100 day plan you present to the CEO and the board or sponsor.

1. Leadership team assessment

Can each top leader deliver their part of the plan?

2. Critical roles map

Which 10 to 15 roles does the plan depend on, and are they covered?

3. Organization and cost review

Are structure, spans, layers and HR cost right for the plan?

4. Pay and incentives check

Do annual and long term incentives reward the investment thesis?

5. HR capability gap

What must the HR function fix to support growth?

6. The 100 day plan

What happens, who owns it, and by when.

SUGGESTED TIMELINE

Week 1

Kickoff and data

Agree scope with the CEO and sponsor. Request org charts, headcount and cost data, pay and incentive plans, recent performance reviews.

Weeks 2 to 4

Interviews

Talk to each executive, the sponsor, two or three board members and a sample of key managers. Fill worksheets 1 to 5 as you go.

Week 5

Findings

Pressure test conclusions with the CEO. Agree the keep, develop or replace calls and the priority fixes.

Week 6

The plan

Complete worksheet 6 and present it to the board or sponsor with owners, dates and the decisions you need.

> **Tip.** Start every worksheet from the value creation plan, not from the org chart. Write the three to five outcomes the plan must deliver on the first line of each worksheet so every judgment is made against them.

LEADERSHIP TEAM ASSESSMENT

Can each top leader deliver the plan?

One row per member of the executive team. Rate against what the plan needs over the next two to three years, not against past performance alone.

Leader	Role	Part of the plan they own	Delivery (1 to 4)	Fit for next phase (1 to 4)	Keep / Develop / Replace	Action	By when
Example: J. Smith	*COO*	*Consolidate plants from 5 to 3*	*3*	*2*	*Develop*	*Add integration lead; coach on change*	*Day 45*

Scale: 1 = well below what the plan needs · 2 = gaps that put the plan at risk · 3 = meets what the plan needs · 4 = could take on more

Watch for. Leaders rated 3 on delivery but 2 on fit. They performed well in the old business but may not lead the new one. Decide early; a replace call made at day 30 costs far less than one made at month 12.

CRITICAL ROLES MAP

Which roles does the plan depend on?

List the 10 to 15 roles, at any level, where a vacancy or a weak performer would put the plan at risk. Many sit below the executive team: plant managers, key account leads, a head of pricing, a lead engineer.

Critical role	Why the plan depends on it	Incumbent	Ready now successor	Retention risk (H / M / L)	Action (retain, backfill, hire, develop)
Example: Head of Pricing	*Owns the 2 point margin lever*	*A. Lopez*	*None*	*H*	*Retention award; name a deputy by day 60*

Watch for. Critical roles with a high retention risk and no ready now successor. These are the first items for your 100 day plan and often the first conversation with the sponsor about retention money.

ORGANIZATION AND COST REVIEW

Is the organization built for the plan?

Capture the facts first, then compare them with peers or with what the plan requires. Use the right hand column for the implication, not just the number.

Measure	Today	Peer or target	Gap
Total headcount			
Layers, CEO to front line			
Average span of control			
Managers with 3 or fewer reports			
People cost as % of revenue			
SG&A headcount as % of total			
HR staff per 100 employees			
HR cost per employee			
Voluntary attrition, last 12 months			
Open roles critical to the plan			

Structure

Does the structure match how the plan says the business will make money? Where do decisions get stuck?

Cost

Where is cost above peers, and which savings would not hurt delivery of the plan?

Watch for. Many small teams led by managers with two or three reports. Delayering is often the quickest cost lever, but sequence it after the critical roles are secured.

PAY AND INCENTIVES CHECK

Does pay reward the investment thesis?

Answer each question for the executive team and for the critical roles. Any "No" or "Partly" becomes a candidate item for the 100 day plan.

Question	Yes	Partly	No	Evidence and action
Annual bonus metrics are the same metrics the value creation plan is measured on	○	○	○	
Long term incentive (equity or cash) is in place for everyone on worksheets 1 and 2 who should have it	○	○	○	
The long term plan pays out on the exit value drivers and has clear vesting, leaver and change of control terms	○	○	○	
Retention does not rest only on an exit payout years away	○	○	○	
Base pay for critical roles is competitive enough to hold them and to hire replacements	○	○	○	
There is a job architecture and salary structure, so pay decisions are not made case by case	○	○	○	
Legacy plans from the previous owner or the acquired business have been mapped and rationalized	○	○	○	
Total incentive cost across scenarios is known and approved by the sponsor	○	○	○	

HR CAPABILITY GAP

What must HR fix to support the plan?

Rate each capability today and the level the plan needs. Prioritize the biggest gaps that touch worksheets 1 to 4.

Capability	Today (1 to 4)	Needed (1 to 4)	Priority (H / M / L)	What good looks like / next step	Owner
HR leadership and team					
People data, HRIS and reporting					
Talent acquisition for critical roles					
Performance management					
Talent reviews and succession					
Compensation and incentive administration					
Employee relations and compliance					
Change management and communication					
Integration capability (for add on deals)					
Board and sponsor people reporting					

Scale: 1 = not in place · 2 = basic and manual · 3 = reliable · 4 = a strength the business can build on

THE 100 DAY PLAN

What happens, who owns it, and by when.

Pull the priority actions from worksheets 1 to 5. Keep it to what the business can absorb: usually 12 to 15 actions in total.

Action	Source worksheet	Owner	Due	Status
Days 1 to 30: secure and stabilize				
Days 31 to 60: decide and restructure				
Days 61 to 100: embed and measure				

Decisions needed from the board or sponsor

People risks to report every month

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WANT A SECOND PAIR OF EYES?

Let us look at your plan together.

HR² Advisory runs the full 100 Day People Plan for PE sponsors and CEOs in 4 to 6 weeks: leader interviews, the six worksheets and a plan presented to your board or sponsor.

Led by Hernán Rein, former CHRO at Fortifi (KKR), PerkinElmer (New Mountain Capital) and Vopak. 15+ acquisitions integrated, 60+ senior leaders upgraded. Works in English, Spanish, Portuguese and French.

Book a 30 minute call →

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