

The New Manager's Action Workbook

Your First 90 Days Leading a Data, BI, or Analytics Team

Companion Worksheets and Checklists

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Reusable blank tools to help you clarify requests, check deliveries, plan your first 90 days, and prepare everyday management conversations.

Request intake card	2
Delivery check	3
Leadership plan: Days 1-30	4
Leadership plan: Days 31-60	5
Leadership plan: Days 61-90	6
Recurring one-on-one agenda	7
Delegation agreement	8
Feedback conversation planner	9
Difficult conversation preparation	10
Difficult conversation follow-up	11
Weekly manager planner	12

How to use these pages

Print the pages you need on US Letter paper (8.5 x 11 inches). These are print-and-write forms. Use the book for explanations and completed examples. Keep confidential notes in your organization's approved systems.

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Request intake card

Complete with the requester and the person accepting ownership. Keep unresolved details visible; a recorded request is not yet a delivery promise.

Request / tracker ID: _____ Date received: _____

Requester / business decision: _____

1 Accepted owner

Who accepts responsibility for coordinating the work? Record their confirmation.

2 Metric definition

What does the measure mean? Include calculation, date range, exclusions, and business approver.

3 Data source

Name the approved source and refresh timing. Record access or dependency gaps.

4 Due date

Record the agreed delivery date and the decision it supports. Identify any provisional date.

5 Definition of done

What output, quality checks, and acceptance are required? Name the reviewer and recipient.

Open question / next action / owner / review date

Owner and requester confirmation / date: _____

Delivery check

Use before releasing a report or dashboard. Check each item only after verifying it; explain any item that does not apply. Keep evidence in the approved work record.

Request / version: _____ Delivery date: _____

Prepared by: _____ Evidence location: _____

- ☐ **Agreed result.** The output answers the agreed question and meets the intake card's definition of done.
- ☐ **Metric definitions.** Calculations, exclusions, units, and treatment of returns match the approved definitions.
- ☐ **Date filters.** Date field, range, boundary dates, time zone where relevant, and default filters are correct.
- ☐ **Source and refresh.** The intended source is used; refresh completed and the data is current enough for this decision.
- ☐ **Joins and duplicates.** The intended row level is preserved. Check row counts and key uniqueness before and after joins; investigate duplicated or missing records.
- ☐ **Reconciled totals.** Totals and key subtotals reconcile to the approved source for the same scope and period. Explain differences and confirm any accepted tolerance.
- ☐ **Second reviewer.** Another qualified person checked the calculation logic and key results. Record their name, date, and review evidence below.
- ☐ **Delivery and access.** Labels, limitations, recipient access, and the version being shared are correct. Communicate unresolved limitations before use.

Exceptions or items that do not apply / action and owner

Second reviewer / date / evidence: _____

Release decision: ☐ Ready ☐ Hold for correction ☐ Approved with limitations

Decision owner / date / acceptance record: _____

Hold delivery when a check fails in a way that could mislead the recipient. Resolve the issue or obtain the appropriate approval and clearly communicate the limitation.

Your leadership plan Days 1–30 — outcome 1

Your turn. Use Maya’s completed forms as a model for detail. Start with one outcome; copy this page if another is useful. Revisit these same pages as your decisions change.

Outcome

Actions

People including owner

Date

Evidence

Support or risks

Status

Your leadership plan Days 31–60 — outcome 1

Your turn. Use Maya’s completed forms as a model for detail. Start with one outcome; copy this page if another is useful. Revisit these same pages as your decisions change.

Outcome

Actions

People including owner

Date

Evidence

Support or risks

Status

Your leadership plan Days 61–90 — outcome 1

Your turn. Use Maya’s completed forms as a model for detail. Start with one outcome; copy this page if another is useful. Revisit these same pages as your decisions change.

Outcome

Actions

People including owner

Date

Evidence

Support or risks

Status

Recurring one-on-one agenda

Your turn. Employee and date: _____. Use a current situation and confirm the agreement with the people involved.

Employee priorities for this conversation

Current work and progress on previous actions

Obstacles and decisions needed

Feedback support and development

Agreed actions with owner and date

Next conversation

Delegation agreement

Your turn. Employee assignment and date: _____. Use a current situation and confirm the agreement with the people involved.

Outcome deadline and evidence of success

Why this person and what work will be adjusted

Authority and boundaries

Resources support and dependencies

Employee approach and questions

Checkpoints escalation triggers and final review

Feedback conversation planner

Your turn. Employee date and purpose: _____. Use a current situation and confirm the agreement with the people involved.

Specific observation and relevant example

Impact on the work stakeholder or team

Opening question and what I need to understand

Employee perspective after the conversation

Agreed action support and owner

Follow-up date and evidence to review

Difficult conversation preparation

Your turn. Use a current situation and confirm the agreement with the people involved.

Concern and specific dated examples

Expectation previously communicated and evidence of the gap

Facts still to verify and possible barriers

Opening and questions for the employee

Support already provided and support to discuss

Consultation or reporting needed before proceeding

Difficult conversation follow-up

Your turn. Complete after the conversation; record the actual response and agreement. Follow Chapter 12's guidance on official records.

Conversation date and relevant participants

Employee response and corrections to the facts

Actual agreement and required next action

Support owner and date

Review date and evidence to examine

Observed progress or remaining gap at follow-up

Next step under the appropriate process

Weekly manager planner

Your turn. Week beginning: _____. Use a current situation and confirm the agreement with the people involved.

Three priority outcomes for this week

One-on-ones and other important conversations

Decisions and commitments I owe to others

Focused work and contingency time

What to delegate simplify postpone or stop

Stress or confidence concern and one helpful action

End-of-week learning and next adjustment
