

DAYS 1–30: LISTEN, LEARN, ASSESS

Goal: Build a complete, accurate picture of the people, systems, and stakeholders before making any structural changes.

People, Process & Culture

- Hold 1:1s with every direct report and skip-level meetings across the broader org to understand strengths, gaps, and morale.
- Meet key leaders in eng org to start to identify who are the trusted advisors and influential thought leaders.
- Observe the engineering build and delivery process for bottlenecks and opportunities.
- Identify flight risks and quick-win recognition opportunities within the first two weeks.

Systems & Architecture

- Review current architecture, security posture, and technical debt inventory, prioritizing anything with active compliance or customer risk.
- Audit existing roadmap commitments, in-flight initiatives, and delivery metrics (velocity, incident SLAs, adoption).
- Identify at least one visible, contained quick win that can be delivered within 30–45 days to establish early credibility.

Business Context

- Understand budget, headcount plan, and how engineering success is currently measured by leadership.
- Meet key cross-functional stakeholders (product, design, quality, compliance, security, sales/customer success) to understand how engineering is currently perceived.
- Map how the AI governance / platform security function ties to broader company strategy and revenue.
- Audit of existing vendor contracts, SOW commitments, external consultant spend, and offshore agency SLAs alongside internal team assessments.

DAYS 31–60: DIAGNOSE, ALIGN, PLAN

Goal: Convert listening into a clear, socialized plan - diagnosing root causes and aligning stakeholders before committing to major changes.

Organizational Design

- Finalize any team structure changes (reporting lines, pod/team boundaries) based on Days 1–30 findings, minimizing unnecessary churn.
- Stand up or refine performance management rhythms: 1:1 cadence, goal-setting, and career development conversations.

- Address any urgent PIP or performance conversations that surfaced during the assessment phase.
- Define a framework for Cross-Organizational Mandates. Address technical boundaries, deprecation schedules, and engineering enforcement for org-wide compliance initiatives that require buy-in from external engineering teams.
- Review engineering quality and operational excellence standards - such as root-cause analysis (RCA) post-mortem processes, automated white-box/CI-CD testing standards, or TDD curriculum adoption.
- Incorporate developer productivity initiatives - specifically assessing and rolling out AI-assisted engineering tools/workflows to boost team throughput.

Technical & Delivery Strategy

- Evaluation of "build vs. buy vs. augment" strategies when building the 6–12 month technical roadmap to leverage strategic partner capacity where immediate internal headcount is lacking.
- Review top 3–5 most critical customer escalations or production issues, determining if incremental change, or fundamental shifts are required to properly remediate.
- Publish a draft 6–12 month technical roadmap addressing the highest-priority architecture, security, and AI governance gaps identified.
- Define or refine engineering metrics (velocity, incident SLAs, security posture indicators) and establish a reporting cadence to leadership.
- Deliver the quick win identified in Days 1–30 to build early trust with the team and stakeholders.

Stakeholder Alignment

- Socialize the draft roadmap with cross-functional peers and leadership; incorporate feedback before finalizing.
- Establish a regular forum (e.g., monthly review) with key stakeholders to keep roadmap and business priorities aligned.

DAYS 61–90: EXECUTE, DELIVER, SCALE

Goal: Move from planning to visible execution - ship measurable results and set the organization up for sustained delivery beyond day 90.

Execution

- Launch execution against the finalized roadmap, with clear ownership and milestones for each workstream.
- Begin or continue any team-building initiatives (hiring, restructuring, offshore/distributed team formation) required to support the roadmap.
- Stand up or mature AI governance / platform security capabilities identified as top priorities, targeting a visible customer- or compliance-facing milestone.

Metrics & Communication

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- Deliver the first full leadership readout showing baseline metrics from Day 1 versus current state (velocity, SLAs, adoption, risk posture).
- Publish a 90-day retrospective to the team: what was learned, what changed, and what's ahead - reinforcing transparency and trust.

Looking Ahead

- Set formal goals for the next two quarters, tied directly to business outcomes (contract expansion, compliance milestones, cost reduction, adoption growth).
- Formalize actionable engineering career ladders and mentorship programs to elevate internal talent and create internal promotion pipelines.
- Identify the next leadership development or succession opportunity within the team, continuing the mentoring track record established in prior roles.
- Setup architectural review board, and R&D pipeline for patentable/defensible platform capabilities.

GUIDING PRINCIPLES THROUGHOUT

- Lead with architectural clarity and ownership boundaries rather than micromanagement - consistent with a track record of building autonomous, high-trust teams.
- Treat every technical initiative as a business outcome in progress - a contract, an SLA, a compliance milestone - not delivery for its own sake.
- Invest equally in distributed, remote, and offshore engineers from day one; culture-building is deliberate, not incidental.
- Convert early wins into visible proof points quickly (30–45 days) to establish credibility before pursuing larger structural or roadmap changes.
- Keep the flywheel moving - have the engineering teams focused on either innovation, or, how to get customers to adopt our innovation.