

Your first 90 days action plan: A practical guide to making a positive start in your first accounting role

Congratulations, you've landed your first accounting role! Now what?

If your first day is looming, it's natural to feel nervous. The good news is that nobody expects an entry-level accountant to arrive knowing everything.

What employers want to see is how you approach the opportunity in front of you: whether you're curious, dependable and willing to learn; whether you ask good questions and respond to feedback; and whether, over time, you can start to take more ownership of your work.

This 90-day action plan gives you practical things to focus on at key points during your first three months in your role.

Good luck!

Day 1: Get your bearings

Your first day is likely to be a whirlwind of information: new people, systems, processes, passwords, terminology and ways of working.

But don't panic – you don't need to remember everything right away.

Your priority for your first day should be to start understanding what's expected of you, how the team works and where you can go for help.

Focus on...

Your immediate priorities

Ask your manager what they'd like you to get to grips with first.

Learning who does what

Start building a picture of your team. Who will you work with regularly? What are they responsible for? Who might you need information from?

Understanding what success looks like

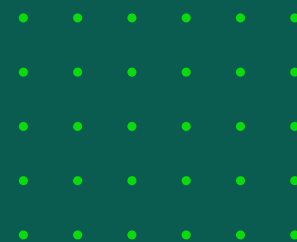
Find out what your manager hopes you'll have learned or achieved during your first few weeks.

A useful question to ask on your first day

What should my main priority be to begin with?

Top tip:

Remember to take lots of notes. Write down new terminology, systems, acronyms and processes. And don't worry about asking people to repeat things so you can write them down – taking notes shows you're paying attention.



Your day 1 check-in

Three things I want to understand better:

Something I learned today:

One person I know I can ask for help:

Day 2-7: Ask good questions

Employers don't expect junior accountants to know everything. What they will notice is how you go about finding things out.

Your aim during your first week isn't just to learn how to complete your individual tasks. Start joining the dots between what you're doing, why it matters and what happens next.

By day 7, aim to:

Start understanding the rhythm of the team

Know about the main deadlines, regular meetings, reporting cycles and recurring tasks that affect your work.

Find out where information lives

Ask about templates, process guides, previous examples, shared folders or other sources of information you'll need.

See how your manager likes to work

Do they prefer questions as they come up or saved for a catch-up? How should you flag something urgent? How often will you have one-to-ones?

Start understanding the bigger picture

Ask where your work goes next. Who uses the information you produce? What decisions does it help them make?

Get to know your colleagues

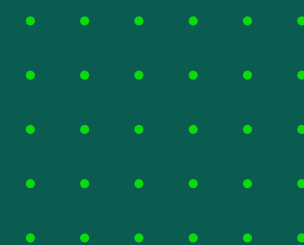
Understand a little more about what different people do and how their work connects with yours.

Have a check-in with your manager

Make sure you have an opportunity to ask your manager how your first week is going and whether there's anything you should be doing differently.

How to ask good questions

Asking for help is part of learning. But before you ask someone else, spend a few minutes trying to move the problem forward yourself.



Before you ask:

1. Check your notes

Has someone already explained this to you – can you answer the question yourself?

2. Look for guidance

Is there a process document or previous example that could help?

3. Think it through

Based on what you already know, what do you think the answer might be?

Now ask the question - Explain what you've tried and where you're unsure.

So, instead of: **"What do I do?"**

ask: **"I've looked at the previous example and I think the next step is X. Am I on the right track?"**

Your day 7 check-in

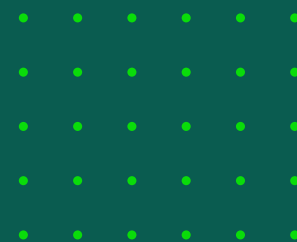
One process I understand better now:

Something about the role that surprised me:

One question I still need answered:

One thing I want to get better at over the next few weeks:

One person I could learn from:



Day 8-30: Building trust

By the end of your first month, you're starting to move beyond simply finding your feet.

You won't know everything yet – and nobody expects you to. But you can start showing colleagues that they can rely on you through small workplace behaviours.

By day 30, aim to be:

Keeping track of your own commitments and deadlines

Find a system that works for you, whether that's your calendar, a to-do list or something else. Know what you've promised to do and when it's due.

Checking your work before handing it over

Get into the habit of reviewing figures, calculations, spelling, formatting and whether you've answered what you were actually asked. It can be helpful to build a checklist of what you should look out for before submitting a piece of work.

Asking for – and actioning – feedback

You don't need to wait for a formal review. Ask for feedback on specific pieces of work as you go, from peers as well as your manager. But remember, if you ask for feedback, you need to do something with it.

Spotting gaps in your knowledge

If the same technical topic keeps catching you out, make a plan to strengthen your skills in this area.

Your day 30 check-in

Something I can now do more confidently:

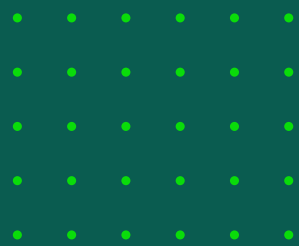
A mistake I've learned from:

Something I still need support with:

Something I'm proud of:

The most useful feedback I've received:

One thing I want to focus on before day 60:



Day 31-60: Take ownership

As you enter month two of your role, you'll have more context, more experience and a better understanding of how your team operates.

This is where you can start taking more initiative and carving out your own specific role within the team. Hopefully you'll feel more confident to make suggestions, anticipate what might be needed when and take on more tasks independently.

By day 60, aim to be:

Thinking one step ahead

When you complete something, pause before immediately asking for your next task. Can you anticipate what the next step might be?

Bringing ideas as well as problems

If you spot an issue, think about possible solutions before you raise it.

Taking responsibility for tasks

Look for regular pieces of work you can now manage with less prompting or supervision.

Flagging problems early

If you think you might miss a deadline, don't wait until the deadline has passed. If something doesn't look right, let someone know.

Asking why, not just how

Understanding why a process exists will help you develop judgement rather than simply memorising steps.

Stretching yourself

Look for a task, project or responsibility that pushes you out of your comfort zone slightly.

Learning from your peers

Are there any colleagues whose skills you admire? It might be their technical knowledge, the way they communicate or how they manage their workload.

Now's the time to flag any concerns

At the end of your second month, take stock. Is the role meeting your expectations? Are there areas you're struggling with or opportunities you're missing? If you have any concerns, raise them with your manager now, while there's still time to act before your probation ends. Remember, it's in their interests for this to be a success too.

Your day 60 check-in

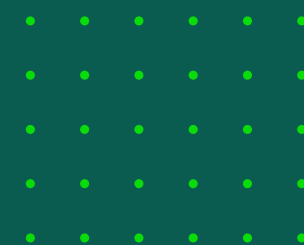
Something I couldn't do on day 1 which now feels familiar:

Something I'm taking more responsibility for:

A piece of feedback I've successfully acted on:

One area I'd like more experience in:

One thing I want to achieve before day 90:



Day 61-90: Look back and decide what comes next

Think back to your first day - it probably feels like a lifetime ago and hopefully you've learned a lot.

Now is a good time to recognise all the progress you've made - and think about what you want to build next.

By day 90, aim to:

Ask for a progress conversation

Talk to your manager about how they think you're developing. Ask where they've seen the most progress and where they'd like you to focus next.

Track your development, with evidence

Look at tasks you can now complete more confidently, feedback you've acted on and things you now understand that felt completely out of reach three months ago. Having a clear list of what you've achieved, with evidence, can help when it comes to taking your next career step (as well as being a real confidence boost!)

Consider your next development areas

Choose a small number of skills you want to strengthen rather than trying to improve everything at once.

Look for ways to broaden your experience

Are there projects you could join, colleagues you could shadow or different areas of finance you could learn more about?

Set yourself clear goals

Decide what progress you'd like to make during your next three to six months.

Your 90 day check-in

Three things I can do now that I couldn't do on day 1:

The piece of feedback that helped me most:

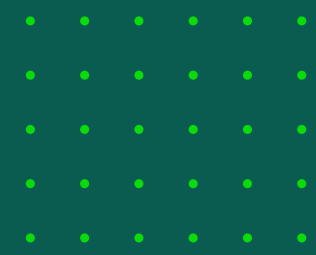
A challenge or mistake that taught me something:

Something I'm proud of:

A part of the role I particularly enjoy:

A strength I want to build on:

Something I'd like more experience of:



Your next 90 days, and beyond

Your development doesn't stop at day 90 – a career in finance means always learning and building your skills.

Here are some useful resources to help you along your career journey:

- Careers advice and live roles can be found at our **Careers Hub**
- Take your career to the next level with **CPD resources**
- Listen to our **Balancing Ambition podcast** for real career stories and advice
- Considering becoming chartered? **Find out** about progression paths with AAT

