Note: This document is “view only”. Please create a copy of this document and save it to your drive.

**Template Example: 90-Day Action Plan- Systems Vault**

Also Known As:

* Getting Down To Business Action Plan - for existing clients
* Breakthrough Strat Call Action Plan - for a dating project/new client

**\_\_\_\_\_\_**

**This plan has been created for:**

**Client Name**

**Website**

**Date**

**OBSERVATIONS**

| 1 | No project management tool in place |
| --- | --- |
| 2 | No solid SOPs in place (especially around what the team members are doing) |
| 3 | Potential for evergreen funnels (products are in place and running successfully) |
| 4 | Potential for list building efforts kicked up a notch |
| 5 | Potential for JV opportunities and guest spots on podcasts |
| 6 | Perfectly poised to bring on an OBM |

**GOALS**

| 1 | Client to not manage the day to day |
| --- | --- |
| 2 | SOPs buttoned up |
| 3 | Social media and editorial handles by Susie (team writer) |
| 4 | Evergreening programs |
| 5 | Restructure of team |
| 6 | Leverage paid ads to increase traffic (Facebook Ads) |

**MAY- JULY**

| Month | Plan of Action | Responsibility |
| --- | --- | --- |
| MAY | Teamwork PM set up | OBM |
| MAY | Audit all products (including recharge settings) | OBM |
| MAY | Audit email marketing system for tagging / list clean up | OBM |
| MAY | Cloud storage organized and systematized | OBM |
| MAY | Ensure website/passwords/pm tools are backed up | OBM |
| MAY/JUNE/JULY | Systems documentation (editorial, onboarding + offboarding team members, SOP for setting up SOPs) | OBM |
| MAY/JUNE/JULY | Team Audit and working with team to document systems | OBM/team |
| MAY/JUNE/JULY | Weekly Calls | OBM/team/Client |
| JUNE | Working with editorial team to streamline and manage editorial systems |  |
| JUNE | Hiring - FB Ads | OBM |
| JUNE | Organizing X product for relaunch | OBM/VA |
| JUNE | Metrics tracking set up | OBM |
| JUNE/JULY | Funnel Mapping and Launch Prep (Aug Launch) | OBM |
| JULY | Hiring (con’t) for VA role for launch tech | OBM |
| JULY | Onboarding FB Ads Team + organizing FB Ads System | OBM |

Resources discussed in our meeting:

Russell Brunson

<https://dotcomsecretsbook.com/get-it-free>

<https://expertsecrets.com/freebook>