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**Template: Breakthrough Strategy Call Action Plan- Systems Vault**

**Client Name, Created on DD/MM/YYYY**

**OBM OBSERVATIONS**

List the observations made during the strategy call (Examples provided below)

| **Observation** | **Notes** | **Priority Status** |
| --- | --- | --- |
| Project management tool in place | The PM tool is not up to date and not streamlined | Mid-priority |
| No SOPs in place | Unaware of what exactly the team is doing on a day-to-day basis | High-priority |
| Need to kick up list building efforts | No CRM tool in place | High-priority |
| Potential for evergreen funnels | Products are up and running successfully | Mid-priority |
| Potential for JV opportunities | Has a network of colleagues to reach out to about guest speaking opportunities on their podcasts | Low-priority |

**CLIENT GOALS**

List the goals specified by the client during the call (Examples provided below)

| 1 | Client would like to not have to be managing the day-to-day of the business |
| --- | --- |
| 2 | Start delegating social media content creation and moderation to the team writer |
| 3 | Evergreen products so client can have more time to focus on creating new steams of revenue |
| 4 | Restructure team members to optimize resources |
| 5 | Get SOPs in place |

**90-DAY ACTION PLAN**

Create a high-view action plan, including who is responsible for implementation below

| Month | Plan of Action | Responsibility |
| --- | --- | --- |
| MAY | Set up and streamline the project management tool | OBM |
| MAY | Audit current products and funnels | OBM |
| MAY | Audit payment management process, set up and recharge settings | OBM |
| MAY | Research CRMs for client’s needs | OBM |
| MAY | Organize cloud storage system + documentation process | OBM |
| MAY | Ensure website/passwords/pm tools are backed up | OBM |
| MAY | Create an SOP for creating SOPs + Screencast for team training purposes | OBM |
| MAY/JUN/JUL | Systems documentation (product creation, payment management, editorial, team member onboarding + offboarding) | OBM/Team/Client |
| MAY/JUN/JUL | Team Audit and working with team to document systems | OBM/Team |
| MAY/JUN/JUL | Weekly Calls | OBM/Team/Client |
| JUNE | Set up CRM and email marketing system + tagging process documentation | OBM |
| JUN | Work with editorial team to organize, steamline and manage editorial processes | OBM/Editorial VA |
| JUN | Metrics tracking set up | OBM |
| JUN/JUL | Organizing X product for relaunch | OBM/Client |
| JUN/JUL | Funnel Mapping and Launch Prep (Aug Launch) | OBM |
| JUL | Hire a Tech VA | OBM |
| JUL | Create Systems + SOPs for JV/Affiliate outreach | OBM |
| JUL | Streamline Metrics documentation and reporting process | OBM/Tech VA |

NOTES/RESOURCES:

List any additional notes or resources to investigate further from the meeting.