

Module 4: The HomeRun - Build Your 90-Day Game Plan - Audit Review

Executive Summary

Sarah's 90-day home run is to hire her first employee (a virtual assistant or junior consultant) and delegate 25-30 hours of work per week, while documenting her core processes and clarifying her ideal client profile. This will create capacity for growth, reduce burnout, and establish the foundation for scaling. This matters to her customers because it enables Sarah to take on more clients and provide better service without sacrificing quality. The plan includes 4 strategic projects focused on operational clarity, team building, process documentation, and positioning refinement.

90-Day North Star Outcome

North Star Statement: "In 90 days, it will be a win if I've hired my first employee, delegated 25-30 hours of work per week, and documented my core processes, and this matters to my customer because it enables me to serve more clients effectively while maintaining the quality and responsiveness they value."

Why This Matters Now: Sarah is at capacity and burning out. She's turning away potential clients and working 60-hour weeks. Without hiring and delegating, she can't grow, and her service quality will decline. She's also considering expanding but needs operational clarity first.

Why This Matters to Customers:

- **Capacity for More Clients:** Hiring enables Sarah to take on more clients without sacrificing quality
- **Better Service:** Delegating routine work allows Sarah to focus on strategy and high-value activities

- **Consistency:** Documented processes ensure consistent quality across all clients
- **Growth:** Sarah can scale her practice while maintaining the personalized service clients value

Strategic Projects Review

Project 1: Clarify Ideal Client Profile and Positioning

Project Name: Client Profile & Positioning Clarity

What "Done" Means:

- Ideal client profile document completed with specific characteristics and traits
- Positioning statement finalized (who we serve, what we do, why we're different)
- Qualification criteria and red flags documented
- 3 case studies developed featuring best-fit clients

3-7 Concrete Next Steps:

1. Analyze past clients (best-fit vs. worst-fit) to identify patterns
2. Create ideal client profile document with specific characteristics
3. Develop positioning statement and core offer statement
4. Document qualification criteria and red flags
5. Select 3 best-fit clients for case studies
6. Interview selected clients and gather testimonials
7. Write and design case studies

Assessment: Realistic and Well-Defined

- Clear deliverables and success criteria
- Steps are specific and actionable
- Timeline is reasonable (4-6 weeks)
- Builds on previous module work (Module 1 insights)

Project 2: Document Core Processes

Project Name: Process Documentation & Systematization

What "Done" Means:

- Three core service playbooks completed (website launch, SEO audit, Google Ads setup)
- Client onboarding checklist created
- Standard operating procedures documented
- Templates and checklists developed for common tasks

3-7 Concrete Next Steps:

1. Identify three core processes to document first (highest revenue/time)
2. Create playbook template/structure
3. Document website launch process step-by-step
4. Document SEO audit process step-by-step
5. Document Google Ads setup process step-by-step
6. Create client onboarding checklist
7. Develop reusable templates and checklists

Assessment: Realistic but Could Be More Specific

- Good overall scope but could break into smaller milestones
- Consider prioritizing one playbook at a time (website launch first, then SEO, then Google Ads)
- Timeline might be optimistic (6-8 weeks for all three) - consider extending or reducing scope

Suggested Missing Steps:

- Test playbooks with current client work to refine
- Get feedback from potential hire on playbook clarity
- Create video walkthroughs or visual guides (optional, future)

Project 3: Hire First Employee

Project Name: Team Building - First Hire

What "Done" Means:

- Job description created and posted
- Candidates interviewed and selected
- Employee hired and onboarded
- 25-30 hours of work delegated per week
- Employee trained on core processes and client communication

3-7 Concrete Next Steps:

1. Define role and responsibilities (virtual assistant vs. junior consultant)
2. Create job description and posting
3. Post job and review applications
4. Conduct initial phone screens (5-10 candidates)
5. Conduct interviews (3-5 candidates)
6. Select candidate and make offer
7. Onboard new hire and begin training

Assessment: ! Needs More Detail on Delegation

- Hiring steps are clear, but delegation plan needs more specificity
- What specific tasks will be delegated? (document these first)
- How will training happen? (use documented processes from Project 2)
- Timeline is realistic (6-8 weeks for hiring, 2-4 weeks for onboarding)

Suggested Missing Steps:

- Identify specific tasks/responsibilities to delegate (before hiring)
- Create training plan and materials
- Set up project management system for collaboration
- Establish communication and feedback protocols

Project 4: Establish Strategic Partnerships

Project Name: Referral Partnership Development

What "Done" Means:

- 2-3 strategic partnerships established with complementary service providers
- Partnership agreements/understandings documented
- Referral process defined and tested
- First referrals received or pipeline established

3-7 Concrete Next Steps:

1. Identify potential partners (accountants, business coaches, trade associations)
2. Research and prioritize 5-7 potential partners
3. Reach out to potential partners and schedule meetings
4. Meet with potential partners and discuss collaboration opportunities
5. Develop partnership agreements/understandings
6. Create referral process and materials
7. Launch partnerships and begin receiving referrals

Assessment: Realistic but Lower Priority

- Good project but might be ambitious for 90 days
- Consider reducing scope (2 partnerships instead of 3)
- Could be moved to Month 4-6 if other projects take longer
- Steps are clear and actionable

Project Prioritization

Recommended Order:

1. **Project 1 (Client Profile):** Do first - foundation for everything else, quick win (4-6 weeks)
2. **Project 2 (Process Documentation):** Do second - needed for Project 3, can start parallel with Project 1 (6-8 weeks)

3. **Project 3 (Hire Employee)**: Do third - depends on Project 2 for training materials, start after Project 2 begins (8-10 weeks)
4. **Project 4 (Partnerships)**: Do last or in parallel - less critical, can be extended beyond 90 days if needed

Rationale: Client profile clarity (Project 1) informs positioning and messaging, which is needed for hiring and partnerships. Process documentation (Project 2) is needed to train a new hire (Project 3). Partnerships (Project 4) are valuable but less urgent and can be developed over time.

Weekly Review Rhythm Assessment

Current Plan: Weekly 30-minute review every Friday afternoon

Assessment:  **Realistic and Sufficient**

- Weekly cadence is appropriate for 90-day goals
- 30 minutes is enough time to review progress and plan next week
- Friday afternoon timing works well (end of week, prepare for next week)

Suggested Enhancements:

- Create a simple review template/checklist (progress on each project, blockers, next week priorities)
- Set calendar reminder/recurring meeting (even if solo, block time)
- Consider monthly deeper review (60-90 minutes) to assess overall progress and adjust plan

Weekly Review Template:

- What did I accomplish this week? (progress on each project)
- What blockers or challenges did I encounter?
- What's my focus for next week? (top 3 priorities)
- Do I need to adjust any timelines or priorities?

Risk Mitigation Strategies

Risk 1: Hiring Takes Longer Than Expected

- **Mitigation:** Start job posting early (Week 2-3), don't wait for perfect process documentation
- **Backup Plan:** Consider contractor/freelancer as interim solution while continuing full hire search

Risk 2: Process Documentation Is Overwhelming

- **Mitigation:** Start with one process (website launch), complete it before moving to next
- **Backup Plan:** Focus on most critical processes first, defer nice-to-have documentation

Risk 3: New Hire Doesn't Work Out

- **Mitigation:** Thorough interview process, trial period, clear expectations
- **Backup Plan:** Have backup candidates, clear exit plan if needed

Risk 4: Client Work Suffers During Transition

- **Mitigation:** Plan hiring during slower period, communicate with clients about changes
- **Backup Plan:** Reduce new client intake during onboarding period if needed

Risk 5: Partnerships Don't Generate Referrals Quickly

- **Mitigation:** Set realistic expectations (partnerships are long-term), focus on other projects first
- **Backup Plan:** This is lower priority - can extend timeline if other projects take longer

Support and Accountability Structures

Recommended Support Structures:

1. **Weekly Review:** Block calendar time for weekly review (non-negotiable)
2. **Accountability Partner:** Find a business peer or coach to check in with monthly

3. **Project Management Tool:** Use simple tool (Trello, Asana) to track progress
4. **Client Communication:** Keep clients informed about changes (especially hiring)

Additional Recommendations:

- Join a mastermind or business group for peer support
 - Consider hiring a business coach for strategic guidance
 - Set up systems early (project management, communication tools) before hiring
 - Celebrate milestones (completed playbook, hired employee, etc.)
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For Your Team

Executive Summary / Key Takeaways

Sarah's 90-day plan focuses on operational clarity, team building, and process documentation. The four strategic projects (client profile, process documentation, hiring, partnerships) are well-aligned with her goals, though some need more specificity on delegation and timelines. The weekly review rhythm is realistic, and risks are identified with mitigation strategies. Success depends on prioritization (client profile first, then processes, then hiring) and maintaining focus.

Key Insight: Hiring and delegating 25-30 hours per week will create capacity for growth, but it requires process documentation first. The projects are interdependent and should be sequenced accordingly.

Action Items and Next Steps

1. **This Week:** Finalize 90-day plan with specific timelines and milestones for each project
2. **Week 1-2:** Begin Project 1 (Client Profile) - analyze past clients and create profile document
3. **Week 2-3:** Begin Project 2 (Process Documentation) - start with website launch playbook
4. **Week 4-6:** Complete Project 1, continue Project 2, begin Project 3 (job posting)

5. **Week 7-10:** Complete Project 2, continue Project 3 (interviews, hiring)
6. **Week 11-12:** Onboard new hire, begin Project 4 (partnerships)

Team Communication Templates / Talking Points

For Stakeholder Update: "Over the next 90 days, we're focusing on three priorities to enable sustainable growth: (1) clarifying our ideal client profile and positioning, (2) documenting our core processes to enable scaling, and (3) hiring our first employee to increase capacity. This foundation will allow us to serve more clients while maintaining the quality and responsiveness they value."

Email to Potential Partners: "We're growing our practice and looking to establish strategic partnerships with service providers who serve the same ideal clients (growth-oriented owner-operators of local service businesses). We'd love to discuss collaboration opportunities. Would you be available for a brief call next week?"

Decision Frameworks

Project Prioritization Criteria:

- **Foundation First:** Projects that other projects depend on (e.g., process documentation needed for hiring)
- **Quick Wins:** Projects that can be completed quickly and build momentum (e.g., client profile)
- **High Impact:** Projects that create the most value (e.g., hiring creates capacity)
- **Risk Management:** Projects that reduce risk (e.g., process documentation reduces dependency on one person)

Weekly Review Checklist:

- Review progress on each project (what's done, what's next)
 - Identify blockers or challenges
 - Adjust priorities or timelines if needed
 - Set top 3 priorities for next week
 - Celebrate wins and milestones
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Remember to click the 'View Final Summary' button below to submit your review and view your complete strategy summary.