90-Day Action Plan

Detailed Execution Guide for Chen Marketing Solutions

Client: Sarah Chen, Chen Marketing Solutions
Start Date: January 15, 2024
End Date: April 15, 2024

90-Day North Star Outcome

"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.

Why This Matters to Customers:

- Capacity for more clients without sacrificing quality
- Better service (Sarah focuses on strategy, employee handles routine work)
- Consistency (documented processes ensure consistent quality)
- Growth (Sarah can scale while maintaining personalized service)

Strategic Projects Breakdown

Project 1: Clarify Ideal Client Profile and Positioning

Project Description: Define exactly who we serve (industry, company size, owner characteristics) and create a profile document to guide all future client selection decisions. Develop positioning statement, qualification criteria, and case studies.

Objectives:

- Create ideal client profile document with specific characteristics
- Finalize positioning statement (who we serve, what we do, why we're different)
- Document qualification criteria and red flags
- Develop 3 case studies featuring best-fit clients

Success Metrics:

- Ideal client profile document completed
- Positioning statement finalized
- Qualification criteria documented
- 3 case studies completed and published

Resource Needs:

- Time: 15-20 hours over 4-6 weeks
- Client interviews for case studies
- Design support for case study formatting (optional)

Dependencies:

- Foundation for other projects (client profile informs positioning, which is needed for hiring and partnerships)

Project 2: Document Core Processes

Project Description: Create written playbooks for the three core services (website launch, SEO audit, Google Ads setup) that can be used by future team members. Develop onboarding checklist and reusable templates.

Objectives:

- Document website launch process (step-by-step playbook)
- Document SEO audit process (step-by-step playbook)
- Document Google Ads setup process (step-by-step playbook)
- Create client onboarding checklist
- Develop reusable templates and checklists

Success Metrics:

- Three core service playbooks completed
- Client onboarding checklist created
- Templates developed for common tasks
- Playbooks tested with current client work

Resource Needs:

- Time: 25-30 hours over 6-8 weeks
- Client work for testing playbooks

Dependencies:

- Needed for Project 3 (process documentation required for training new hire)
- Can start parallel with Project 1 (different skillsets)

Project 3: Hire First Employee

Project Description: Recruit and onboard a virtual assistant or junior consultant, delegating 25-30 hours of work per week to create capacity for growth. Train new hire on core processes and client communication.

Objectives:

- Define role and responsibilities (virtual assistant vs. junior consultant)
- Create job description and posting
- Interview candidates and select best fit
- Onboard new hire and begin training

- Delegate 25-30 hours of work per week

Success Metrics:

- Job description created and posted
- Candidate selected and hired
- New hire onboarded and trained
- 25-30 hours/week delegated successfully

Resource Needs:

- Time: 20-25 hours over 8-10 weeks (hiring and onboarding)
- Budget: Salary/compensation for new hire
- Process documentation (from Project 2) for training

Dependencies:

- Depends on Project 2 (process documentation needed for training)
- Can start job posting early (Week 4-6) while continuing process documentation

Project 4: Establish Strategic Partnerships

Project Description: Establish 2-3 strategic partnerships with complementary service providers (accountants, business coaches, trade associations) who serve the same ideal customer profile. Develop referral process and materials.

Objectives:

- Identify and prioritize potential partners
- Reach out and schedule meetings with potential partners
- Develop partnership agreements/understandings
- Create referral process and materials
- Launch partnerships and begin receiving referrals

Success Metrics:

- 2-3 partnerships established

- Partnership agreements documented

- Referral process created

- First referrals received or pipeline established

Resource Needs:

- Time: 10-15 hours over 8-12 weeks

- Networking and relationship building

- Partnership materials development

Dependencies:

- Lower priority project - can be extended if other projects take longer

- Can start in parallel with other projects (different skillset)

Week-by-Week Timeline

Weeks 1-2: Foundation and Start

Week 1 (Jan 15-21):

- Finalize 90-day plan with specific timelines

- Begin Project 1: Analyze past clients (best-fit vs. worst-fit)

- Set up weekly review schedule and template

- Identify tasks/responsibilities to delegate (for Project 3)

Week 2 (Jan 22-28):

- Continue Project 1: Create ideal client profile document

- Begin Project 2: Identify three core processes to document first

- Begin Project 2: Create playbook template/structure

- Weekly review: Review progress, adjust plan if needed

Milestones:

- ✅ Weekly review system established
- ✅ Tasks to delegate identified
- ✅ Playbook template created

Weeks 3-4: Building Momentum

Week 3 (Jan 29 - Feb 4):

- Continue Project 1: Develop positioning statement and core offer statement
- Continue Project 2: Begin documenting website launch process
- Begin Project 3: Define role and responsibilities for new hire
- Weekly review: Track progress on Projects 1, 2, 3

Week 4 (Feb 5-11):

- Continue Project 1: Document qualification criteria and red flags
- Continue Project 2: Continue documenting website launch process
- Continue Project 3: Create job description for new hire
- Weekly review: Assess progress, adjust timelines if needed

Milestones:

- ✅ Positioning statement drafted
- ✅ Website launch playbook 50% complete
- ✅ Job description created

Deliverables:

- Ideal client profile document (draft)
- Positioning statement (draft)
- Website launch playbook (50% complete)
- Job description (draft)

Weeks 5-6: Accelerating Progress

Week 5 (Feb 12-18):

- Complete Project 1: Finalize ideal client profile and positioning statement
- Continue Project 2: Complete website launch playbook
- Continue Project 3: Post job and begin reviewing applications
- Weekly review: Celebrate Project 1 completion, assess Project 2 and 3

Week 6 (Feb 19-25):

- Complete Project 1: Select 3 best-fit clients for case studies
- Continue Project 2: Begin documenting SEO audit process
- Continue Project 3: Conduct initial phone screens (5-10 candidates)
- Weekly review: Review Project 1 completion, track Projects 2 and 3

Milestones:

- ✅ Project 1 complete (profile and positioning)
- ✅ Website launch playbook complete
- ✅ Job applications reviewed, phone screens scheduled

Deliverables:

- Ideal client profile document (final)
- Positioning statement (final)
- Qualification criteria (final)
- Website launch playbook (complete)
- Case study client selection (complete)

Weeks 7-8: Deep Work and Hiring

Week 7 (Feb 26 - Mar 4):

- Begin Project 1: Interview selected clients and gather testimonials
- Continue Project 2: Continue documenting SEO audit process
- Continue Project 3: Conduct interviews (3-5 candidates)

- Weekly review: Track all three active projects

Week 8 (Mar 5-11):

- Continue Project 1: Write and design case studies
- Continue Project 2: Complete SEO audit playbook
- Continue Project 3: Select candidate and make offer
- Begin Project 4: Identify potential partners (accountants, coaches, associations)
- Weekly review: Celebrate Project 2 progress, track Project 3 and 4

Milestones:

- ✅ SEO audit playbook complete
- ✅ Candidate selected and offer made
- ✅ Potential partners identified

Deliverables:

- Case studies (draft)
- SEO audit playbook (complete)
- Job offer extended

Weeks 9-10: Onboarding and Documentation

Week 9 (Mar 12-18):

- Complete Project 1: Finalize and publish case studies
- Continue Project 2: Begin documenting Google Ads setup process
- Continue Project 3: Onboard new hire (first week)
- Continue Project 4: Research and prioritize 5-7 potential partners
- Weekly review: Celebrate Project 1 completion, track Projects 2, 3, 4

Week 10 (Mar 19-25):

- Complete Project 2: Complete Google Ads setup playbook
- Continue Project 2: Create client onboarding checklist

- Continue Project 3: Continue onboarding new hire (second week)
- Continue Project 4: Reach out to potential partners
- Weekly review: Assess progress on all projects

Milestones:

- ✅ Project 1 complete (all deliverables)
- ✅ Google Ads setup playbook complete
- ✅ New hire onboarding in progress (Week 2)

Deliverables:

- Case studies (final, published)
- Google Ads setup playbook (complete)
- Client onboarding checklist (draft)
- New hire onboarding (Week 2)

Weeks 11-12: Finalizing and Partnerships

Week 11 (Mar 26 - Apr 1):

- Complete Project 2: Finalize client onboarding checklist and templates
- Continue Project 2: Test playbooks with current client work
- Continue Project 3: Continue onboarding and begin delegating tasks (25-30 hours/week)
- Continue Project 4: Schedule meetings with potential partners
- Weekly review: Track progress on Projects 2, 3, 4

Week 12 (Apr 2-8):

- Complete Project 2: Finalize all playbooks and templates
- Continue Project 3: Continue delegating (target: 25-30 hours/week)
- Continue Project 4: Meet with potential partners and develop agreements
- Weekly review: Final review of 90-day plan progress

Milestones:

- ✅ Project 2 complete (all playbooks and templates)
- ✅ New hire fully onboarded and delegating 25-30 hours/week
- ✅ Partnership meetings scheduled/completed

Deliverables:

- All playbooks (complete, tested)
- Client onboarding checklist (final)
- Templates (complete)
- New hire onboarding (complete)
- Partnership agreements (draft)

Weeks 13-14: Wrap-up and Next Cycle

Week 13 (Apr 9-15):

- Complete Project 4: Finalize partnership agreements and launch partnerships
- Continue Project 3: Maintain 25-30 hours/week delegation
- Evaluate overall 90-day plan progress
- Plan next 90-day cycle
- Final review: Assess what worked, what didn't, and what's next

Milestones:

- ✅ Project 4 complete (partnerships established)
- ✅ 90-day plan complete
- ✅ Next cycle planned

Deliverables:

- Partnership agreements (final)
- Referral process (complete)
- 90-day plan evaluation (complete)

- Next 90-day plan (draft)

Risk Mitigation Strategies

Risk 1: Hiring Takes Longer Than Expected

Mitigation:

- Start job posting early (Week 4-6), don't wait for perfect process documentation
- Have backup candidates if primary candidate doesn't accept
- Consider contractor/freelancer as interim solution while continuing full hire search

If Risk Occurs:

- Extend Project 3 timeline by 2-4 weeks
- Consider interim contractor to maintain momentum
- Adjust Project 4 timeline if needed

Risk 2: Process Documentation Is Overwhelming

Mitigation:

- Start with one process (website launch), complete before moving to next
- Focus on most critical processes first, defer nice-to-have documentation
- Break documentation into smaller milestones (50% complete, 75% complete, 100% complete)

If Risk Occurs:

- Reduce scope (document 2 processes instead of 3)
- Extend Project 2 timeline by 2-4 weeks
- Prioritize processes needed for training new hire

Risk 3: New Hire Doesn't Work Out

Mitigation:

- Thorough interview process with multiple candidates

- Trial period (2-4 weeks) before permanent commitment

- Clear expectations and communication from start

- Have backup candidates identified

If Risk Occurs:

- End trial period if needed

- Return to hiring process with backup candidates

- Adjust Project 3 timeline accordingly

Risk 4: Client Work Suffers During Transition

Mitigation:

- Plan hiring during slower period (if possible)

- Communicate with clients about changes

- Reduce new client intake during onboarding period if needed

- Set clear boundaries and expectations

If Risk Occurs:

- Reduce new client intake temporarily

- Communicate proactively with existing clients

- Adjust Project 3 timeline if needed

Risk 5: Partnerships Don't Generate Referrals Quickly

Mitigation:

- Set realistic expectations (partnerships are long-term)

- Focus on other projects first (lower priority)

- Build relationships gradually, don't rush

If Risk Occurs:

- This is lower priority - can extend timeline if other projects take longer

- Focus on building relationships, not immediate referrals
- Reassess in next 90-day cycle

Accountability & Support Structures

Weekly Review System

Frequency: Every Friday afternoon (30 minutes)

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?

Monthly Deep Review (90 minutes, first Friday of month):

- Overall progress assessment
- Timeline and milestone review
- Risk assessment and mitigation
- Next month priorities

Project Management System

Tool: Trello or Asana (simple project management tool)

Board Structure:

- Project 1: Client Profile & Positioning
- Project 2: Process Documentation
- Project 3: Hiring
- Project 4: Partnerships
- Weekly Review
- Blockers & Challenges

Card Structure (per project):

- To Do (this week)
- In Progress (this week)
- Done (this week)
- Blockers

Support Network

Accountability Partner: Business peer or coach (monthly check-ins)

- Share progress updates
- Discuss challenges and solutions
- Celebrate wins and milestones

Mastermind Group (optional, recommended):

- Join business mastermind for peer support
- Share progress and get feedback
- Learn from others' experiences

Business Coach (optional, recommended):

- Strategic guidance on complex decisions
- Support during challenging periods
- Help maintain focus and momentum

Communication Plan

Client Communication:

- Keep clients informed about changes (especially hiring)
- Proactive communication about any delays or adjustments
- Set clear expectations about service delivery during transition

Team Communication (when hired):

- Daily check-ins during onboarding (first 2 weeks)

- Weekly check-ins after onboarding (regular schedule)

- Clear communication channels and expectations

Weekly Review Scorecard

Use this scorecard each week to track progress on all projects:

Project/Area	This Week's Goal	Actual Result	Status	Next Week Focus
Client Profile	Complete ideal client profile document	Profile document completed and reviewed	🟢	Develop positioning statement
Process Documentation	Create playbook template	Template created, started website launch playbook	🟢	Continue website launch playbook (target: 50% complete)
Hiring	Define role and create job description	Role defined, job description drafted	🟡	Finalize job description and post job
Partnerships	Not started	-	-	Identify potential partners next week

Status Legend:

- 🟢 Green: On track or ahead of schedule

- 🟡 Yellow: Minor delays but recoverable

- 🔴 Red: Significant delays requiring intervention

Usage Instructions:

1. Fill out "This Week's Goal" at the beginning of each week
2. Fill out "Actual Result" and "Status" during weekly review (Friday)
3. Fill out "Next Week Focus" to plan the following week
4. Review overall status and adjust plan if needed

Success Metrics and Milestones

Project 1: Client Profile & Positioning

- ✅ Ideal client profile document completed (Week 5)
- ✅ Positioning statement finalized (Week 5)
- ✅ Qualification criteria documented (Week 5)
- ✅ 3 case studies completed (Week 9)

Project 2: Process Documentation

- ✅ Website launch playbook completed (Week 5)
- ✅ SEO audit playbook completed (Week 8)
- ✅ Google Ads setup playbook completed (Week 10)
- ✅ Client onboarding checklist completed (Week 11)
- ✅ Templates developed (Week 11)

Project 3: Hiring

- ✅ Job description created (Week 4)
- ✅ Job posted (Week 5)
- ✅ Candidate selected (Week 8)
- ✅ New hire onboarded (Week 11)
- ✅ 25-30 hours/week delegated (Week 12)

Project 4: Partnerships

- ✅ Potential partners identified (Week 8)
- ✅ Partnership meetings scheduled/completed (Week 11)

- ✅ Partnership agreements developed (Week 13)
- ✅ Referral process created (Week 13)

Next Steps After 90 Days

Month 4-6 Priorities

1. **Evaluate and Refine**: Assess what worked, what didn't, and what needs adjustment
2. **Scale Delegation**: Increase delegation to 35-40 hours/week as new hire becomes more capable
3. **Expand Partnerships**: Build on established partnerships, add 1-2 more
4. **Refine Processes**: Update playbooks based on new hire feedback and experience
5. **Plan Next Hire**: If capacity still constrained, plan for second hire (Month 6-9)

Ongoing Activities

- Weekly reviews (maintain system)
- Monthly deep reviews (assess progress and adjust)
- Client work (maintain quality and responsiveness)
- Continuous improvement (refine processes and systems)

Conclusion

This 90-day action plan transforms Sarah's game plan into a detailed execution guide. Success depends on prioritization, execution, and maintaining focus on high-impact activities. The weekly review scorecard helps track progress and stay accountable. Adjust the plan as needed, but maintain momentum toward the 90-day North Star outcome.

Remember: This is a guide, not a rigid plan. Adjust timelines and priorities as needed, but stay focused on the North Star outcome: hire first employee, delegate 25-30 hours/week, and document core processes to enable sustainable growth.

Use this document weekly to track progress and stay on track. Update the scorecard each week and adjust the plan as needed.