



AI-assisted 90-day client growth planner

A week-by-week action workbook with AI prompts and measurable follow-through

Use this to organize your business records. Keep original documents secure. This is not tax, legal or accounting advice.

Start with one outcome

Business: _____ Core offer: _____ Ideal client: _____

Start date: _____ Day 90: _____ Weekly time available: _____

This is an execution planner, not a promise of sales. Do not send AI-written messages without verifying facts, consent, recipient and tone.

Baseline and target

Measure	Now	Day 90 target	How measured
Qualified conversations / week			
Proposals / week			
New clients / month			
Average client value			
Follow-up completion %			

Your 13-week map

Week	Move	Expected evidence
1	Define the client and the offer	
2	Gather proof and objections	
3	Build a focused lead list	
4	Send and learn from first outreach	

Week	Move	Expected evidence
5	Publish one useful answer	
6	Improve the follow-up	
7	Ask for referrals	
8	Build a factual case study	
9	Test a second channel	
10	Improve discovery calls	
11	Make proposals clearer	
12	Revisit warm leads respectfully	
13	Review and plan the next 90 days	

Rules for AI and contact

Remove private client information from prompts unless approved for that tool. AI drafts are not facts. Check testimonials, metrics and offers yourself.

Contact only people where the channel and relationship permit it. Honor opt-outs. Keep a record of what you actually sent.

Week 1 / Define the client and the offer

Dates: _____ to _____ Focus metric: _____

Interview or review three real client questions; name one pain point and the result you help with. Draft a one-sentence offer and list claims you can prove.

This week's concrete moves: 1. Plan and prepare. 2. Execute the week's move. 3. Record actual responses and next steps.

Action / person	Due	Done	Evidence / next step

Write three versions of my [offer] for [specific audience] with [verified outcome]. Keep each under 35 words. Do not promise results.

From these anonymized notes [notes], extract recurring problems and words the customer uses. Separate direct quotes from your guesses.

Measure	Target	Actual	What I learned
Relevant contacts			
Replies			
Calls			
Proposals			
New clients			

One thing to keep next week: _____

One thing to change: _____

Week 1 / working notes and follow-up

Copy the best version of your approved message and note why it worked. Do not paste private client data into an unapproved tool.

Name / lead ID	Reason / need	Last touch	Next date	Status

What prospects asked	My answer or research needed	Owner / date

Weekly review date: _____ Owner: _____ Next week's priority:

Week 2 / Gather proof and objections

Dates: _____ to _____ Focus metric: _____

Ask clients for permission before using feedback. Collect recurring objections and a factual example of the work. Build a short FAQ with verified answers.

This week's concrete moves: 1. Plan and prepare. 2. Execute the week's move. 3. Record actual responses and next steps.

Action / person	Due	Done	Evidence / next step

Turn these verified facts [facts] into a short case-study outline. Mark gaps instead of inventing a testimonial or result.

Using these anonymized objections [list], draft a clear FAQ. If an answer needs proof, say what proof is missing.

Measure	Target	Actual	What I learned
Relevant contacts			
Replies			
Calls			
Proposals			
New clients			

One thing to keep next week: _____

One thing to change: _____

Week 2 / working notes and follow-up

Copy the best version of your approved message and note why it worked. Do not paste private client data into an unapproved tool.

Name / lead ID	Reason / need	Last touch	Next date	Status

What prospects asked	My answer or research needed	Owner / date

Weekly review date: _____ Owner: _____ Next week's priority:

Week 3 / Build a focused lead list

Dates: _____ to _____ Focus metric: _____

Choose one segment, find suitable prospects through approved sources, log why each fits, and respect platform outreach rules. Prepare 20 relevant leads, not a bulk scrape.

This week's concrete moves: 1. Plan and prepare. 2. Execute the week's move. 3. Record actual responses and next steps.

Action / person	Due	Done	Evidence / next step

Given my ideal client [profile] and offer [offer], give a lead qualification checklist. Do not provide scraped identities or private contact details.

Draft a first-contact note for a person who opted into messages about [topic]. Use only [verified context] and one question.

Measure	Target	Actual	What I learned
Relevant contacts			
Replies			
Calls			
Proposals			
New clients			

One thing to keep next week: _____

One thing to change: _____

Week 3 / working notes and follow-up

Copy the best version of your approved message and note why it worked. Do not paste private client data into an unapproved tool.

Name / lead ID	Reason / need	Last touch	Next date	Status

What prospects asked	My answer or research needed	Owner / date

Weekly review date: _____ Owner: _____ Next week's priority:

Week 4 / Send and learn from first outreach

Dates: _____ to _____ Focus metric: _____

Send a small approved batch. Log contact, channel, reason for fit, date and reply. Note objections and revise the next batch; honor opt-outs.

This week's concrete moves: 1. Plan and prepare. 2. Execute the week's move. 3. Record actual responses and next steps.

Action / person	Due	Done	Evidence / next step

Rewrite this approved first-contact draft [draft] to be clearer and under 80 words. Preserve facts and remove pressure.

Classify these anonymized replies [replies] as interested, not now, no fit or opt-out; propose the next respectful action.

Measure	Target	Actual	What I learned
Relevant contacts			
Replies			
Calls			
Proposals			
New clients			

One thing to keep next week: _____

One thing to change: _____

Week 4 / working notes and follow-up

Copy the best version of your approved message and note why it worked. Do not paste private client data into an unapproved tool.

Name / lead ID	Reason / need	Last touch	Next date	Status

What prospects asked	My answer or research needed	Owner / date

Weekly review date: _____ Owner: _____ Next week's priority:

Week 5 / Publish one useful answer

Dates: _____ to _____ Focus metric: _____

Pick a real question from prospects. Draft one useful post and a short email version; check every claim and show one practical step.

This week's concrete moves: 1. Plan and prepare. 2. Execute the week's move. 3. Record actual responses and next steps.

Action / person	Due	Done	Evidence / next step

Draft a 150-word educational post for [audience] answering [question]. Include [verified step], no promises or personalized tax advice.

Create three short headings and a 40-word email teaser for the same approved post. Do not invent client stories.

Measure	Target	Actual	What I learned
Relevant contacts			
Replies			
Calls			
Proposals			
New clients			

One thing to keep next week: _____

One thing to change: _____

Week 5 / working notes and follow-up

Copy the best version of your approved message and note why it worked. Do not paste private client data into an unapproved tool.

Name / lead ID	Reason / need	Last touch	Next date	Status

What prospects asked	My answer or research needed	Owner / date

Weekly review date: _____ Owner: _____ Next week's priority:

Week 6 / Improve the follow-up

Dates: _____ to _____ Focus metric: _____

Review open conversations and their timing. Follow up only where permission and context support it. Ask one clear question and record the next touch.

This week's concrete moves: 1. Plan and prepare. 2. Execute the week's move. 3. Record actual responses and next steps.

Action / person	Due	Done	Evidence / next step

Write a 60-word follow-up for someone who asked [question] on [date]. Use only [facts]; ask one next-step question and avoid urgency tricks.

Given this anonymized conversation [summary], suggest whether to follow up, wait or close the loop; explain the relevant consent and context.

Measure	Target	Actual	What I learned
Relevant contacts			
Replies			
Calls			
Proposals			
New clients			

One thing to keep next week: _____

One thing to change: _____

Week 6 / working notes and follow-up

Copy the best version of your approved message and note why it worked. Do not paste private client data into an unapproved tool.

Name / lead ID	Reason / need	Last touch	Next date	Status

What prospects asked	My answer or research needed	Owner / date

Weekly review date: _____ Owner: _____ Next week's priority:

Week 7 / Ask for referrals

Dates: _____ to _____ Focus metric: _____

Identify satisfied clients who may welcome a request. Make a low-pressure, specific ask; do not assume endorsement. Track introductions and thank-yous.

This week's concrete moves: 1. Plan and prepare. 2. Execute the week's move. 3. Record actual responses and next steps.

Action / person	Due	Done	Evidence / next step

Draft a 70-word referral request to a client who has agreed to hear from me. My offer helps [audience] with [problem]. No implied endorsement.

Write a thank-you note for an introduction, using only [verified facts]. Keep it warm and brief.

Measure	Target	Actual	What I learned
Relevant contacts			
Replies			
Calls			
Proposals			
New clients			

One thing to keep next week: _____

One thing to change: _____

Week 7 / working notes and follow-up

Copy the best version of your approved message and note why it worked. Do not paste private client data into an unapproved tool.

Name / lead ID	Reason / need	Last touch	Next date	Status

What prospects asked	My answer or research needed	Owner / date

Weekly review date: _____ Owner: _____ Next week's priority:

Week 8 / Build a factual case study

Dates: _____ to _____ Focus metric: _____

Choose one permissioned example. Outline the starting point, work, measured result and limitations. Obtain approval before using any names or claims.

This week's concrete moves: 1. Plan and prepare. 2. Execute the week's move. 3. Record actual responses and next steps.

Action / person	Due	Done	Evidence / next step

Build a case-study outline from [approved facts] with challenge, steps, outcome and caveats. Mark missing evidence.

Turn this approved outline [outline] into a 120-word story without names, guarantees or invented metrics.

Measure	Target	Actual	What I learned
Relevant contacts			
Replies			
Calls			
Proposals			
New clients			

One thing to keep next week: _____

One thing to change: _____

Week 8 / working notes and follow-up

Copy the best version of your approved message and note why it worked. Do not paste private client data into an unapproved tool.

Name / lead ID	Reason / need	Last touch	Next date	Status

What prospects asked	My answer or research needed	Owner / date

Weekly review date: _____ Owner: _____ Next week's priority:

Week 9 / Test a second channel

Dates: _____ to _____ Focus metric: _____

Choose one channel your audience actually uses. Reformat one proven message rather than making a new claim. Track effort, replies and qualified calls.

This week's concrete moves: 1. Plan and prepare. 2. Execute the week's move. 3. Record actual responses and next steps.

Action / person	Due	Done	Evidence / next step

Adapt this verified post [post] for [channel] in its native length. Preserve facts and include one low-pressure call to action.

Design a two-week test comparing [channel A] and [channel B], with time spent, qualified replies and calls as measures.

Measure	Target	Actual	What I learned
Relevant contacts			
Replies			
Calls			
Proposals			
New clients			

One thing to keep next week: _____

One thing to change: _____

Week 9 / working notes and follow-up

Copy the best version of your approved message and note why it worked. Do not paste private client data into an unapproved tool.

Name / lead ID	Reason / need	Last touch	Next date	Status

What prospects asked	My answer or research needed	Owner / date

Weekly review date: _____ Owner: _____ Next week's priority:

Week 10 / Improve discovery calls

Dates: _____ to _____ Focus metric: _____

Review why calls do or do not turn into proposals. Draft five open questions about need, timing, budget and fit. Practice listening and documenting next steps.

This week's concrete moves: 1. Plan and prepare. 2. Execute the week's move. 3. Record actual responses and next steps.

Action / person	Due	Done	Evidence / next step

Draft five discovery questions for [offer] aimed at [audience]. Avoid leading questions or assumptions.

From anonymized call notes [notes], create a factual recap and next steps. Mark any unconfirmed commitments.

Measure	Target	Actual	What I learned
Relevant contacts			
Replies			
Calls			
Proposals			
New clients			

One thing to keep next week: _____

One thing to change: _____

Week 10 / working notes and follow-up

Copy the best version of your approved message and note why it worked. Do not paste private client data into an unapproved tool.

Name / lead ID	Reason / need	Last touch	Next date	Status

What prospects asked	My answer or research needed	Owner / date

Weekly review date: _____ Owner: _____ Next week's priority:

Week 11 / Make proposals clearer

Dates: _____ to _____ Focus metric: _____

Audit a proposal for scope, timeline, deliverables, price and exclusions. Ask a trusted reviewer to find confusing terms. Do not change commitments without approval.

This week's concrete moves: 1. Plan and prepare. 2. Execute the week's move. 3. Record actual responses and next steps.

Action / person	Due	Done	Evidence / next step

Edit this proposal [redacted text] for clarity. Preserve all numbers, scope and terms exactly; flag ambiguities rather than filling them.

Draft a concise cover note for this approved proposal [facts] with one next-step question; no invented deadline.

Measure	Target	Actual	What I learned
Relevant contacts			
Replies			
Calls			
Proposals			
New clients			

One thing to keep next week: _____

One thing to change: _____

Week 11 / working notes and follow-up

Copy the best version of your approved message and note why it worked. Do not paste private client data into an unapproved tool.

Name / lead ID	Reason / need	Last touch	Next date	Status

What prospects asked	My answer or research needed	Owner / date

Weekly review date: _____ Owner: _____ Next week's priority:

Week 12 / Revisit warm leads respectfully

Dates: _____ to _____ Focus metric: _____

Review past interest, permission and prior objections. Send one useful update when relevant and close quiet threads without repeated pressure.

This week's concrete moves: 1. Plan and prepare. 2. Execute the week's move. 3. Record actual responses and next steps.

Action / person	Due	Done	Evidence / next step

Write a brief check-in for a lead who last asked [question] on [date]. Include only this relevant new fact [fact]. Allow an easy no.

Given anonymized lead statuses [list], prioritize by relevance and consent; identify whom not to contact.

Measure	Target	Actual	What I learned
Relevant contacts			
Replies			
Calls			
Proposals			
New clients			

One thing to keep next week: _____

One thing to change: _____

Week 12 / working notes and follow-up

Copy the best version of your approved message and note why it worked. Do not paste private client data into an unapproved tool.

Name / lead ID	Reason / need	Last touch	Next date	Status

What prospects asked	My answer or research needed	Owner / date

Weekly review date: _____ Owner: _____ Next week's priority:

Week 13 / Review and plan the next 90 days

Dates: _____ to _____ Focus metric: _____

Compare your baseline and final metrics. Review conversion by stage, time cost, client feedback and retention. Choose one channel and one offer test for next quarter.

This week's concrete moves: 1. Plan and prepare. 2. Execute the week's move. 3. Record actual responses and next steps.

Action / person	Due	Done	Evidence / next step

From these anonymous weekly counts [data], calculate conversion rates and describe patterns without claiming causation.

Write a one-page next-quarter plan using [evidence], one primary channel, one offer change and a measurable weekly habit.

Measure	Target	Actual	What I learned
Relevant contacts			
Replies			
Calls			
Proposals			
New clients			

One thing to keep next week: _____

One thing to change: _____

Week 13 / working notes and follow-up

Copy the best version of your approved message and note why it worked. Do not paste private client data into an unapproved tool.

Name / lead ID	Reason / need	Last touch	Next date	Status

What prospects asked	My answer or research needed	Owner / date

Weekly review date: _____ Owner: _____ Next week's priority:

Reusable weekly planning page

Duplicate this page for any additional planning cycle.

Monday plan	Friday actual
One result to pursue:	Result / evidence:
People to contact:	Contacts / replies:
Useful content topic:	Published / response:
Follow-ups due:	Follow-ups done / next date:

Lead / source	Need / next step	Last touch	Next touch	Status

Day 90 scorecard

Measure	Baseline	Target	Actual	Next test
Qualified conversations				
Proposals				
New clients				
Average client value				
Time spent				

What worked	What to stop or change	Next 30-day test

Decision owner: _____ Review date: _____