



Build a practical 90-day marketing plan for your firm.

A quarter can disappear into separate requests: a new service page, more posts, an advertising test, a report nobody quite trusts. Start with the work your firm can actually take on. This guide helps a leadership team turn that choice into a plan that can be delivered and reviewed, without pretending every channel deserves the same share of attention.

Your working output.

A service-led action plan with owners, dependencies, budget assumptions and evidence checkpoints.

Use the companion tool.

Use the blank working sheets for your own plan

Keep unknown estimates blank and record their basis

Keep confidential client and lead details in approved private systems

The example is fictional and the 90-day horizon is not a performance guarantee

Version 1.0. Sources checked 2026-10-28. Open-access planning guidance. Verify your own inputs and professional requirements.

Make the decision with your team.

Choose the work the firm wants to win.

Name one priority service and the buyer who needs it. Describe the priority tightly enough for someone handling an enquiry to distinguish a finance leader seeking integration support from an individual seeking urgent professional help, with the relevant service boundaries visible. Record the problem, buying trigger, market and exclusions together.

Follow one buyer decision through the website.

Walk from discovery to verification to enquiry. How might the buyer first hear about the service? What would they check before trusting the firm? What information would make contacting you useful? Capture actual recurring questions from your team, using approved summaries rather than copying confidential conversations into a planning file.

Inspect what already supports the service.

Use the Current evidence sheet to record the relevant service page, expert profiles, useful articles, published proof and contact path. Open the pages on a phone as well as a larger screen. Note what you actually found, its source and when you checked it. Mark inaccessible reports as unknown. An empty export is not evidence that demand is zero.

Source: [Google's guide to generative AI search features](#), [Google Business Profile representation guidelines](#)

Select connected actions with a clear reason.

Choose the smallest set of actions that makes the buyer journey more complete. Before paying for more visits, check whether a reviewed service-page revision, a useful expert article and an agreed enquiry definition would help the buyer understand the offering and the next step. Equal activity across four channels is unnecessary.

Make the decision with your team.

Make expert input and approval part of the plan.

Every action needs a delivery owner and an approval owner. Record both responsibilities even when one person owns delivery and approval, then specify the client's contribution, such as an interview, technical clarification, approved project evidence, account access or a decision about exclusions. An agency cannot infer professional facts that only the firm knows.

Keep cost assumptions visible and editable.

List external costs and internal time separately. Media spend, agency work, production and third-party costs answer different questions, so identify what each estimate includes. Use your own currency and unit consistently. The workbook contains no recommended fee or standard allocation because the right scope depends on the firm and the work.

Choose checkpoints that lead to decisions.

A 90-day horizon creates a manageable planning conversation. It does not promise a result within 90 days. Set a review date and the evidence needed to continue, change, pause or investigate each action, including early checks that a page, permission and contact journey are ready for activation.

Source: [Avoid sending personally identifiable information to Analytics](#)

Work through an example.

Illustrative example: a consultancy plans one service journey.

A fictional consultancy wants to develop its post-acquisition integration service for finance leaders. Its partners agree to exclude software implementation and individual career advice. The delivery lead confirms capacity for discovery conversations, while the principal can contribute an interview and review an anonymized explanation of the firm's approach.

The team finds that the service page lists capabilities but never explains what happens during the first assessment. It plans a reviewed page revision, a source-backed article about integration readiness and an intake prompt that asks about the business problem without requesting confidential transaction details. Advertising remains a later decision, dependent on the page and measurement brief.

Adapt the review for legal work and architecture projects.

For a law firm, start with matter fit, jurisdiction and the responsible attorney's review. A page explaining how an initial conversation works may be useful, but it must not imply that every enquiry creates a client relationship or that a result is guaranteed. Name the authorized reviewer and keep case-specific information outside the public planning file.

Before preparing an architecture project story, record the studio's exact role, project status, client approval and image rights so the evidence gives a buyer more context than the photographs alone. Identify which design choices can be explained publicly and which collaborators should receive credit. A published project can help a buyer evaluate fit only if the description is accurate and its use is authorized.

Define the decision.

Blank working page. Record only information approved for this planning file. Add a source or an unknown status where evidence is missing.

Priority service

Buyer

Appropriate work

Capacity

Exclusions

Record the next action.

Blank working page. Record only information approved for this planning file. Add a source or an unknown status where evidence is missing.

Checkpoint

Task

Evidence needed

Evidence available

Interpretation

Use, review and keep the context.

Complete the workbook and agree the next decision.

Start in Instructions, then complete Goals and constraints and Buyer questions, and add the pages and evidence you inspected to Current evidence. Enter tasks in Action plan only when their purpose and dependency are clear. Use the dropdowns for pillar and status, while leaving unavailable estimates blank.

The Budget assumptions sheet records the source of cost and time estimates. Review decisions captures the checkpoint, evidence, interpretation and agreed next action. Illustrative example is deliberately separate from the clean working sheets. Read it for the method, then write your own plan in the blank areas without carrying fictional entries into a real budget.

Sources.

[Google's guide to generative AI search features](#)

<https://developers.google.com/search/docs/fundamentals/ai-optimization-guide>

[Google Business Profile representation guidelines](#)

<https://support.google.com/business/answer/3038177?hl=en>

[Avoid sending personally identifiable information to Analytics](#)

<https://support.google.com/analytics/answer/6366371?hl=en>

Current HTML guide and related reading.

<https://www.growthfriday.com/resources/growth-360-planning-workbook>

Recommendations are planning guidance. Platform documents describe their own surfaces. Fictional examples are not results, tests or benchmarks. Review source changes and professional requirements before use.