A clearer quarter starts here.

A practical workbook for a business owner or growth lead. Spend about one useful hour turning a broad goal into two workstreams, specific commitments and a review rhythm.

Business / team

Plan owner

90-day period: from / to

First review date

Before you start

Gather recent enquiry, sales, booking or customer records. Bring the person responsible for follow-up. If a number is missing, mark it unknown and give someone the task of finding it.

How to use the workbook

1. Define the outcome and establish what you know (pages 2-3).
2. Compare opportunities and choose two workstreams (pages 4-5).
3. Sequence the work and confirm budget and ownership (pages 6-7).
4. Set the review rhythm and complete the one-page plan (pages 8 and 10).
5. Use the worked example on page 9 if you need a starting point.

What decision should this plan help you make?

Type into the blank fields or print and write by hand. Save a copy before editing. This workbook has no automatic calculations and sends no data to Clay + Flint. Targets are planning choices, not predictions.

01 / Define a useful outcome.

Choose one commercial priority you can influence. Describe the business problem before choosing a channel. If measurement is missing, making it dependable can be the first deliverable.

What is holding progress back? State the problem, not a tactic.

By [date], we want to change [defined metric] from [baseline] to [target].

What exactly counts?

Source / report / date range

Current baseline, or UNKNOWN

Target + why it is realistic

Who owns this measurement?

Missing data + date to establish it

A useful answer sounds like this

Improve qualified estimate requests for one priority service. Define qualified by service, area and timeframe; use actual records for the baseline. Avoid setting a numerical growth target before you know the starting point.

02 / Find the sticking point.

Describe the customer journey. Use observed behavior, customer questions and operating records. Do not select the weakest stage from opinion alone.

Who is the priority customer?

Which offer or service?

What useful action should they take, and what happens next?

At each stage, record evidence and the gap.

Discover: how do suitable people find you?

Understand: can they explain the offer and fit?

Trust: can they verify the claims and process?

Act: does the enquiry, booking or buying step work?

Follow through: who responds, owns and records the outcome?

03 / Choose the work worth doing.

List up to four possible improvements. Score impact and confidence from 1 to 3, then divide by effort (1 to 3). Use this as a discussion aid; dependency and business judgment still matter.

Scoring guide

Impact: 1 = small, 2 = useful, 3 = directly addresses the main constraint. Confidence: 1 = guess, 2 = some evidence, 3 = strong evidence. Effort: 1 = small, 2 = moderate, 3 = substantial. Score = impact x confidence / effort. Calculate manually.

Option 1: improvement + supporting evidence

Impact / confidence / effort / score

Option 2: improvement + supporting evidence

Impact / confidence / effort / score

Option 3: improvement + supporting evidence

Impact / confidence / effort / score

Option 4: improvement + supporting evidence

Impact / confidence / effort / score

Our two priorities + why they come first

Later / not this quarter: what are we explicitly deferring?

04 / Define two workstreams.

A workstream is an area of focus with a result, not an unlimited list of services. Name concrete outputs, an owner, a dependency and evidence of completion before committing.

Workstream 1

Name + intended change

Specific outputs we will deliver this quarter

Owner + reviewer

Required inputs + dependency owner

Done means... [acceptance evidence] / measure to observe

Workstream 2

Name + intended change

Specific outputs we will deliver this quarter

Owner + reviewer

Required inputs + dependency owner

Done means... [acceptance evidence] / measure to observe

05 / Sequence the next 90 days.

Create a realistic sequence. Include research, approvals, implementation, testing and use. A finished asset is not automatically an adopted workflow or a business result.

Days 1-30 / Establish and prepare

Priority work + deliverable + due date

Completion / adoption evidence

Dependency + owner + review date

Days 31-60 / Build and use

Priority work + deliverable + due date

Completion / adoption evidence

Dependency + owner + review date

Days 61-90 / Review and refine

Priority work + deliverable + due date

Completion / adoption evidence

Dependency + owner + review date

Allow time to learn

A long sales cycle or search investment may need more than 90 days for a useful commercial observation. State the observation window and agree the decision this quarter can actually support.

06 / Match ambition to capacity.

Budget for the work and the cost of running it. Separate agency or production fees from media, tools and internal effort. Confirm the total before the plan becomes a commitment.

Project / service / production budget

Media spend budget

Software / platform / API costs

Other costs + contingency

Total budget + payment timing

Budget approver + approval date

Internal team: owner, weekly availability and approval turnaround

If scope exceeds capacity, what will we stop, defer or rescope?

Name the cost assumptions

Record whether figures include taxes, one-time setup and recurring costs. Do not add overlapping fees twice. A budget is only approved when the responsible person agrees it; this worksheet does not authorize purchases.

07 / Review the evidence.

Track delivery, use and commercial observations separately. Select one primary business metric, then supporting measures that explain the journey. Do not treat a launch as proof of growth.

Primary metric + source + review window

Supporting measures + definitions

Weekly delivery review: owner / day

Monthly evidence review: owner / date

The review agenda

- [ ] Delivery: what passed the agreed acceptance check, and what is blocked?
- [ ] Adoption: is the team using it; does the customer journey work?
- [ ] Commercial: what changed in qualified demand, conversion or retention?
- [ ] Context: what else changed, and where is the evidence incomplete?

Decision log

Decision 1: date / evidence / continue, change or stop / owner / next review

Decision 2: date / evidence / continue, change or stop / owner / next review

Worked example / A local service.

Illustrative planning example only. It is not a Clay + Flint client result, a benchmark, a forecast or a package promise. Replace every assumption with your own records.

The situation

The team says it needs more enquiries. A review suggests requests lack job details and follow-up is inconsistent. The first objective is to establish the qualified-enquiry baseline and make the priority service journey dependable.

Choose using evidence, then capacity.

Option A: simplify the service enquiry. Impact 3 x confidence 2 / effort 2 = 3.
Option B: define routing and follow-up. Impact 3 x confidence 3 / effort 1 = 9.
Option C: add another social channel. Impact 1 x confidence 1 / effort 2 = 0.5.
Decision: choose A and B. Defer C until the journey works. Scores support the discussion; the routing dependency also makes B an early priority.

Two workstreams, with completion evidence

1 / Enquiry journey: approved copy for one service, a shorter form and a clear receipt. Done means the page is usable on a phone and with a keyboard, and a test enquiry reaches its owner.
2 / Follow-up: agreed qualification, response templates and an owner for every request. Done means staff can use the process and test records have a next action.

A realistic sequence

Days 1-30: review records, define qualified, identify the owner and test routing.
Days 31-60: improve the page and form, test the handoff and train the team.
Days 61-90: review enquiry quality, estimates and reasons for lost opportunities.
Weekly: inspect open requests and delivery blockers. Monthly: review the journey evidence and decide the next change.

What would change the plan?

If suitable visitors rarely reach the page, demand may become the next constraint. If requests arrive but nobody follows up, fix ownership before buying more traffic. Set a growth target only after the baseline, capacity and observation period support it.

Your 90-day plan / One page.

Use this page in your next planning meeting. Bring the detailed pages when a commitment or assumption needs context. Revisit the plan when evidence changes.

Business + plan owner

Period + next review

Objective + metric definition + baseline / target / source

Workstream 1: outputs + owner + done

Workstream 2: outputs + owner + done

First 30 days: commitment + due date

Later / not in scope

Budget + capacity + approver

Critical dependency + owner + due date

At day 90, we will continue / change / stop based on this evidence...

Before you call this a plan

Check: one objective; two workstreams; real owners; approved resources; clear completion evidence; known data gaps; a scheduled review. If you want help choosing the first scope, visit clayandflint.com/book/.