



LESSON 3 WORKSHEET

The 90-Day Action Plan

01 The Gap Audit

Instructions. Score yourself on each dimension: Strong, Needs Work, or Not There Yet.

01 WEBSITE

Does your homepage speak directly to your ideal patient, or does it speak to everyone?

☐ Strong ☐ Needs Work ☐ Not There Yet

Is there a clear, low-friction next step for someone who lands on your page?

☐ Strong ☐ Needs Work ☐ Not There Yet

Does your differentiation statement live anywhere on your site?

☐ Strong ☐ Needs Work ☐ Not There Yet

NOTES

02 REFERRAL RELATIONSHIPS

Who in your market sends patients to practices like yours, and do they know you exist?

☐ Strong ☐ Needs Work ☐ Not There Yet

Have you had a direct conversation with any referral source in the last 90 days?

☐ Strong ☐ Needs Work ☐ Not There Yet

When you describe your ideal patient to a referral partner, are you using the profile you built in Lesson 1?

☐ Strong ☐ Needs Work ☐ Not There Yet

NOTES

03 ONLINE PRESENCE

If your ideal patient Googled the problem you solve, not your name, would they find you?

☐ Strong ☐ Needs Work ☐ Not There Yet

Are your Google Business Profile and key directories accurate, complete, and active?

☐ Strong ☐ Needs Work ☐ Not There Yet

Does your social presence reflect what makes you different?

☐ Strong ☐ Needs Work ☐ Not There Yet

NOTES

04 WORD OF MOUTH

NOTE If you're early stage, "not applicable yet" is a real answer.

Do you have a system, even a simple one, for asking the patients you have to refer someone?

☐ Strong ☐ Needs Work ☐ Not There Yet ☐ Not Applicable Yet

Have you given anyone specific language to describe your practice and who it's for?

☐ Strong ☐ Needs Work ☐ Not There Yet ☐ Not Applicable Yet

Could the people who already know your practice describe your ideal patient if someone asked them?

☐ Strong ☐ Needs Work ☐ Not There Yet ☐ Not Applicable Yet

NOTES

05 COMMUNITY VISIBILITY

Are you visible in any professional, civic, or community organizations your ideal patient is part of?

☐ Strong ☐ Needs Work ☐ Not There Yet

Have you spoken, written, or shown up anywhere in the last six months as an expert, not just as a doctor?

☐ Strong ☐ Needs Work ☐ Not There Yet

Does your practice exist in the offline conversation of your community?

☐ Strong ☐ Needs Work ☐ Not There Yet

NOTES

PRIORITIZATION

Look at your scores across all five dimensions and answer these two questions.

Which gap would have the most direct impact on new memberships in the next 90 days?

Which gap can you realistically address with the time and resources you have right now?

Circle your top 2–3 priorities before moving to Part 2.

02 Your 90-Day Action Plan

Instructions. Using your top priorities from Part 1, build your sequence below. For each month, name the priority, list the specific action steps, and note who is responsible for each.

MONTH 1 **FIX THE FOUNDATION**

PRIORITY _____

The test: if a perfect-fit patient looked you up today, would what they find make them take a next step?

DONE	ACTION STEP	WHO	DUE DATE
☐			
☐			
☐			
☐			
☐			

MONTH 2 **BUILD THE BRIDGE**

PRIORITY _____

One channel or relationship, built deliberately. Show up as a resource, not an ad.

DONE	ACTION STEP	WHO	DUE DATE
☐			
☐			
☐			
☐			
☐			

PRIORITY

Consistency before traction. The goal is showing up long enough for word to spread.

DONE	ACTION STEP	WHO	DUE DATE
☐			
☐			
☐			
☐			
☐			

A NOTE ON THE WHO COLUMN

Some of these steps are yours. Some belong to a staff member, a contractor, or someone you haven't hired yet. If a step lands in the "needs outside help" column, name that now, because knowing what you can't do yourself is just as important as knowing what you can.