

ROADMAP · PROFESSIONAL FIRMS · RESOURCE LIBRARY

The 90-Day Growth Systems Roadmap

Install capture, response, booking, follow-up, and reviews in your firm, in three 30-day phases.

INTRODUCTION

Most professional firms do not have a lead problem. They have a gap problem. A call goes to voicemail and nobody calls back. A form comes in on Friday and gets answered on Tuesday. A prospect says "let me think about it" and never hears from the firm again. A booked consultation is missed and never rescheduled.

Speed matters more than most firms think. In a study of 2,241 U.S. companies published in the *Harvard Business Review*, firms that tried to contact a new inquiry within an hour were nearly seven times as likely to have a meaningful conversation with a decision maker as firms that waited even an hour longer (Oldroyd, McElheran, and Elkington, "The Short Life of Online Sales Leads," March 2011). The same study found that 23 percent of the companies never responded at all.

A growth system closes those gaps with five working parts: **capture** every inquiry, **respond** fast, **book** and remind, **follow up** to an outcome, and **earn reviews**. This roadmap shows how a law firm, medical or dental practice, wealth office, real estate brokerage, accounting firm, or consulting practice can install those five parts in 90 days, in three 30-day phases, on one system the firm owns.

It is the same order we follow in the Growth Systems Implementation at Aday Interactive, Inc. You can use it to run the project yourself, or to check the work of whoever runs it for you.

This roadmap is general information for professional firms, current as of October 2026. It is not legal, compliance, or ethics advice, and it is not a promise of results. Results depend on your traffic, how quickly your team responds, the quality of your service, and how fully your team adopts the system. Confirm messaging, consent, and record keeping with your own counsel or compliance officer.

BEFORE DAY 1

Name an owner

One person inside the firm owns this project. Not the managing partner who approves things once a month, but the person who runs daily operations and will still be using the system on day 300. Give them two hours a week for 90 days.

Write down your starting numbers

You cannot tell what improved if you never wrote down where you started. Fill in the ROI worksheet at the end of this roadmap before you change anything. Rough numbers are fine. Write down where each one came from.

Gather access

- website admin or a contact who can add a form or a chat window
 - domain and DNS access, for sending email from your own domain
 - owner access to your Google Business Profile
 - your main phone number and who answers it
 - any calendars your team books from
 - your existing contact lists, wherever they live today
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Submit texting registration early

Business texting from a local number has to be registered with the carriers before it can be switched on. Submit it in the first week. Approval timing is set by the carriers and the platform, not by your firm, so plan around it. Anything that depends on texting is built and tested while you wait, then switched on once approval clears.

DAYS 1 TO 30: FOUNDATION

The first month is unglamorous. It is also where most projects succeed or fail. Nothing goes out to clients yet.

Account architecture

- Open the firm's own account on the platform, in the firm's name, so the firm owns the data and the history.
 - Add each user with only the access they need. Partners, intake staff, and assistants usually need different views.
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- Set up the sending domain for email and the business phone number for calls and texts.
- Decide where each kind of message lives: the shared team inbox, or one person's queue.

Contact cleanup

- Bring existing contacts in from spreadsheets, email, and old systems.
- Merge duplicates and fix obvious errors.
- Record the source of each contact where you know it.
- Record consent status. If you do not know whether someone agreed to texts, treat them as not agreed.
- Archive contacts you will never contact again, instead of carrying them forward.

Pipeline stages

A pipeline shows where every inquiry stands. Keep it to six or seven stages that match how your firm actually works. Two illustrations:

- **Law firm (illustration):** New inquiry, Contacted, Consultation booked, Consultation held, Engagement sent, Retained, Not a fit.
- **Medical or dental practice (illustration):** New request, Contacted, Appointment booked, Seen, Treatment plan accepted, Not scheduled.

Name an owner for each stage, and decide what moves an inquiry forward. Every message tied to a stage carries the compliance line for your profession.

Calendars

- Set appointment types, lengths, buffers, and the notice you need.
- Connect each person's calendar so bookings never double up.
- Turn on confirmations and reminders by email and, once approved, by text.
- Add clear reschedule instructions to every confirmation.

Capture and routing

- Connect every website form so each inquiry lands in the system with its source.
- Send an instant, plain confirmation to the person who inquired.
- Alert the right team member, based on the type of inquiry.
- Make sure calls, forms, and messages all end up in one place your team checks.

Consent

- Add clear consent wording to every form that collects a phone number.
- Make sure STOP and other opt-outs work and are honored. The FCC's rules require you to honor an opt-out made by any reasonable means within 10 business days.
- Keep a record of when and how each person agreed.

Checklist for day 30

- The firm's account is open, in the firm's name, with the right users
- Contacts are cleaned, sourced, and marked for consent
- The pipeline has six or seven stages, each with an owner
- Calendars, confirmations, and reminders work
- Every form lands in the system and alerts the right person
- Consent wording and opt-outs are in place

DAYS 31 TO 60: LAUNCH

The second month turns the foundation into systems that work on their own. Launch one piece at a time, and test each one from a real phone before the next.

Follow-up sequence

Build a short text and email follow-up, for example over 7 days, for new inquiries that have not booked. It should stop the moment the person replies or books. Keep every message short and human, with one clear next step. Regulated firms keep the messages general: never mention the facts of a matter, a health concern, or an account.

No-show and reschedule recovery

When an appointment is missed, send a polite note with a link to rebook, and alert the team. Many missed appointments are a schedule problem, not a lost client.

Reactivation

Look at past inquiries that never became clients and have agreed to hear from you. Send one honest message: you are still available, here is how to book. Then stop. Never message anyone who opted out.

Reviews

Set one review request, by text and email, at the moment work is finished, with one reminder. Ask every client, never just the happy ones, and never offer anything in exchange. Google's policies and the FTC rule on consumer reviews (16 CFR Part 465) prohibit both review gating and paid or rewarded reviews. Our free guides, *Reviews Without the Risk* and *Google Business Profile Setup*, cover this in detail.

Missed-call text-back

When a call goes unanswered, send an automatic text that acknowledges the call and gives a next step, such as a booking link or a callback time. Build and test it now; it switches on once texting approval clears.

AI-assisted chat, where scoped

If chat is part of your project, configure it from your firm's approved answers, with booking or a handoff to a person. Chat is not a substitute for legal, medical, financial, or professional advice. Our *AI Chat Readiness Checklist* covers the preparation.

Dashboard

Build one simple dashboard your owner will actually open. Start with five numbers: new inquiries by source, speed of first response, appointments booked, appointments held, and new clients.

Checklist for day 60

- The follow-up sequence runs and stops on reply or booking
- Missed appointments trigger a rebook message and a team alert
- One reactivation message has gone to past inquiries who opted in
- The review request goes out on the same trigger for every client
- Missed-call text-back is built, tested, and live or waiting on approval
- AI-assisted chat is live, if scoped, and passed its test script
- The dashboard shows the five starting numbers

DAYS 61 TO 90: MEASURE AND IMPROVE

The third month is about making the system stick. A system nobody runs stops working within a quarter.

Weekly review

Every week, the owner spends 30 minutes with the dashboard:

- Which inquiries waited longest for a first reply, and why?
- Which pipeline stage is stuck?
- Which follow-up message gets replies, and which gets ignored?
- Did every finished matter or visit get a review request?

Change one thing at a time, and write down what you changed and when.

Training

Train each person on the part of the system they touch: how to work the inbox, move an inquiry through the pipeline, take over a chat, and log an outcome. Short, hands-on sessions with real examples work better than one long demo.

Written procedures

Write a one-page procedure for each routine: the morning inbox check, the after-hours callback list, the weekly review, adding a new team member, and what to do when someone opts out. Keep them where the team can find them.

Ownership

Write down who owns what: what your firm manages, what an outside partner manages, and what needs a partner's or compliance officer's approval before it changes. Every message template, compliance line, and review reply belongs on that approval list.

The day 90 review

Fill in the ROI worksheet again with your new numbers. Compare them with your starting numbers. Decide what to improve next, and what to leave alone because it is working.

Checklist for day 90

- The weekly review is on the owner's calendar, for good
- Every person has been trained on their part
- One-page procedures exist for each routine
- An ownership list says who manages and who approves what
- The ROI worksheet has been filled in a second time

ROI WORKSHEET

Estimate what recovered inquiries could be worth to your firm. Your numbers, your estimate: not a forecast and not a promise. Be conservative, because inquiries recovered late often convert at a lower rate than fresh ones.

Step 1: Your current numbers (one month)

Your number	Before	Day 90
A. New inquiries (calls, forms, chats)	_____	_____
B. Average time to first reply	_____	_____
C. Missed calls not returned the same day	_____	_____
D. Inquiries that never got a reply or follow-up	_____	_____
E. Share of inquiries that become clients	_____ %	_____ %
F. Average value of a new client (first-year fees)	\$_____	\$_____

Step 2: Your estimate

1. Of the inquiries in D, how many would a working system have reached in time? _____ (G)
2. G times E = new clients per month: _____ (H)
3. H times F = monthly value: \$_____. Times 12 = yearly: \$_____

Illustration, invented numbers: 8 inquiries a month got no reply. The firm estimates a system would have reached 4. It turns 25 percent of inquiries into clients, so that is 1 client a month. At \$4,000 per client, that is \$4,000 a month, or \$48,000 a year.

Then compare with the cost. Add up a year of setup, the platform, messaging usage, and your team's time. If the estimate only works with optimistic guesses, trust the cautious version.

AFTER YOU FINISH READING

From the founder.

A note on what to do with what you just read.

Ninety days is long enough to build something real and short enough that nobody loses interest. The firms that finish are the ones that protect the first 30 days: clean contacts, a pipeline that matches how they really work, and consent done right before a single message goes out.

Fill in the worksheet before you change anything. Your own starting numbers are the only honest way to know, on day 90, whether the system earned its keep.

WHEN YOU'D RATHER NOT RUN THE PROJECT ALONE

We install this with you, in your account, in 90 days.

The Growth Systems Implementation follows this roadmap in your firm: account setup, contact cleanup, pipelines, calendars, capture and routing, follow-up and reactivation, reviews, a dashboard, then weekly improvement, training, and written procedures. It starts at \$5,000, and if you completed the Growth Systems Intensive, its fee credits in full. Reply to the email this came in, or book a call.

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