Month 1:

To-dos:

- Niching
- ICP defining
- Understanding where ideal clients are
- Messaging and choosing channels

WEEK 1 — Identify Your Best-Fit Clients (ICP Definition)

✔ Review your existing client base and identify niches that have already developed.
✔ Make a note of the industry where referral clusters have appeared (e.g., medical, SaaS, e-commerce, banks). ✔ Choose the niche you actually *want* to serve — the one you enjoy and want to be known for.
✔ Define 2–3 ICPs (use Matthew's examples as models):
– For example, a 10-person SaaS startup before their first accountant – 20-person e-commerce brand with sales tax complexity
✔ Document their common pain points (sales tax, cash flow, invoicing, lack of accounting support, etc.).

WEEK 2 — Map Where Your ICP Learns & Hangs Out

✔ Identify conferences, online communities, ecosystems, and software platforms
✔ Note where they get information about accounting and adjacent services
✔ Start following their influencers and tools. As Matthew says, “go where they learn, immerse yourself in their world.”
✔ Identify 3-5 places you can gain exposure (events, LinkedIn groups, app ecosystems)

WEEK 3 — Build Your Positioning & Messaging

✔ Create a one-page positioning statement: - Who do you serve - What business challenges do you eliminate - What business outcomes do you deliver
✔ Build messaging around pain points (Gaynor: “Pain-based messaging + proof”) ✔ Start preparing real proof points:
- Case Studies - Testimonials - Examples of solving niche-specific issues

WEEK 4 — Pick Your Primary Channels

✔ Choose 1-2 core visibility channels - LinkedIn content, monthly webinars, speaking opportunities at targeted niche events
✔ Decide which channel gives you access to the ICP most efficiently
✔ Document which internal team member will own each channel

Month 2:

To-do’s:

- Content targeted to ICP
- Lead magnets
- Webinars/roundtable
- Outbound sequences

Week 5: Launch Your Weekly ICP Content

✔ Start a weekly LinkedIn post series designed for your niche ("insight posts").
✔ Use Gaynor’s framework: Pain → Insight → Proof → Invitation. ✔ Start simple: 1 post per week tied to real ICP frustrations.

WEEK 6 — Create One Lead Magnet / Diagnostic Offer

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✔ Build one practical resource based on niche pain. Examples could include: – Pricing guide – What good bookkeeping looks like – Checklist for solving a recurring pain
✔ Make it downloadable and specific to your ICP

WEEK 7 — Host a Monthly Webinar / Office Hours

✔ Launch a small, niche-focused webinar or office hours session.
✔ Theme should be tied to ICP pain (examples from transcript: sales tax, cash flow, SaaS metrics, WIP). ✔ Use it to test messaging and understand which topics "land."

WEEK 8 — Start Outbound the Right Way (Five-by-Eight)

✔	Build a targeted list of ideal clients (use LinkedIn + digital tools).

✔ Run the outreach pattern referenced by Matthew: Five-by-Eight sequence 1. Email 2. Phone call 3. Email 4. Phone call 5. Email …over eight business days.
✔ Keep scripts human and helpful — not spammy.

Month 3:

To-do's:

- CRM
- Sales System
- Tracking
- Discovery framework
- Follow-up rhythm
- Removing dependency on rainmakers

WEEK 9 — Implement a Light CRM or Tracking Sheet

✔ Start simple: track all leads, conversations, activity, and status.
✔ Use HubSpot, Salesforce, or even a spreadsheet (mentioned in transcript).
✔ Tag ICP type + stage.

✔ Track activity, not assumptions (Matthew's "your close rate is not what you think").

WEEK 10 — Standardize Your Discovery Call Script

✔ Build a discovery script based on: 1. Problem 2. Impact 3. Ideal Future 4. Why Now 5. Next Step
✔ From the webinar's discussion on sales mistakes + structure: - Add qualification criteria (who is NOT a fit). - Add proof points when needed (Matthew: "Some prospects need more proof points").

WEEK 11 — Build Proposal Templates & Offers

✔ Standardize proposals for your core services.
✔ Create packaged offers so every discussion isn't custom.
✔ Define when you bring in SME support

✔	Prepare a second-call structure for larger clients ($2k+/month type).

WEEK 12 — Set Your Follow-Up Rhythm

✔ Define your weekly sales cadence for warm leads.
✔ Use the team-based model discussed: – Marketers → Appointment Setters → Closers
✔ Ensure hand-offs are clean and capacity is planned.
✔ Review pipeline weekly to ensure no lead goes cold (this fixes the “we had a call and nothing happened” problem).
✔ Remove founder dependency by sharing pipeline ownership.

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