

# Chapter 10: Your First 90 Days — Action Plan

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## Week 1: Build Your Foundation

1. Set up your Ethos agent portal and customize your website (photo, bio, contact info)
2. Add appointment booking integration (Calendly or Google scheduling)
3. Install Meta Pixel and Google Tag on your agent website
4. Order professional business cards with your QR code
5. Create or update social media profiles on Facebook, Instagram, LinkedIn, and TikTok
6. Set up your link-in-bio page (Linktree or similar)
7. Create a professional email signature with your Ethos link
8. Download and save your QR code in high resolution

## Week 2: Launch Your Presence

1. Post your first social media content (commit to 3x/week minimum)
2. Share your Ethos link with your warm market — aim for 100+ contacts
3. Join 2 local networking groups (Chamber of Commerce, BNI, or similar)
4. Send your introduction email to your existing contact list
5. Start creating short-form video content (even if it's just talking to camera)

## Weeks 3-4: Build Momentum

1. Launch your first email campaign (introduction + educational drip)
2. Attend your first networking event with business cards and QR code
3. Ramp up social media to 4-5 posts per week
4. Start tracking all metrics in a simple spreadsheet
5. Connect with 3-5 potential referral partners (mortgage brokers, real estate agents)

## Month 2: Accelerate Growth

1. Begin paid advertising (\$5-10/day on Facebook or Google)
2. Host or co-host your first educational event or lunch-and-learn
3. Formalize 3 referral partnerships with written agreements
4. Optimize your approach based on 30-day data (what's working? what's not?)
5. Expand your email list and launch your monthly newsletter

## Month 3: Scale & Grow

1. Scale paid advertising on your best-performing channel (\$15-20/day)
2. Expand your geographic reach in networking and advertising
3. Identify and recruit your first new agent to join The Policy Shop team
4. Conduct a full 90-day review of all metrics against targets
5. Refine your strategy and set goals for the next quarter

## Daily Agent Workflow

Time Block	Activity	Duration	Key Actions
Morning (8-10 AM)	Social Media & Engagement	1-2 hours	Post daily content, respond to comments/DMs, engage with followers' content
Midday (10 AM-1 PM)	Follow-Up & Outreach	2-3 hours	Follow-up calls, send emails, respond to quote inquiries, client meetings
Afternoon (1-4 PM)	Networking & Events	2-3 hours	Attend events, meet referral partners, host seminars, community outreach
Evening (7-9 PM)	Planning & Content Creation	1-2 hours	Plan tomorrow's posts, create video content, review metrics, update pipeline

### ACCOUNTABILITY TIP

Share this 90-day plan with your mentor at The Policy Shop. Schedule weekly check-ins to review your progress and get coaching. Agents who have accountability partners consistently outperform those who go it alone.