

90-day channel checklist

Tick one channel at a time. Weekly time is a ceiling, not a quota. The measure is a count you can see, not a promise of new clients.

The other five sheets: Google Business Profile setup sheet, website page-by-page annotation key, social post rewrite card, referral outreach script, marked ad examples sheet. Open one sheet this week.

Practice: _____ Start date: _____ Owner: _____

Google Business Profile

20 min/week

First action: Open the profile editor and write the category you will confirm before you save. Do not copy a category from this kit.

- ☐ **Wk 1-4** Category, services, hours, and a telehealth note written. Photos are the office, not a client.
- ☐ **Wk 5-8** Each review: reply, or leave unanswered on purpose, with the date noted. One post drafted against the never-include list, or no post.
- ☐ **Wk 9-12** Monthly upkeep on the calendar. Hours still match the week you will actually be open.

Measure: Date the profile matched the setup sheet. Not a ranking.

Practice website

30 min/week

First action: List home, about, fees, specialties, telehealth, and crisis. Mark which lines are missing.

- ☐ **Wk 1-4** Licensure line and fees line written in words a visitor can check.
- ☐ **Wk 5-8** Specialties include a no-list. Telehealth names where the client must be located. Crisis path is a phone number, not an inbox.
- ☐ **Wk 9-12** Read every page against the annotation key. Rewrite any line you marked FIX.

Measure: Count of pages that pass the key. Not traffic.

Organic social

25 min/week

First action: Take one draft you were about to post and run it through the rewrite card.

- ☐ **Wk 1-4** Three rewrites done. Stop rule written where you draft.
- ☐ **Wk 5-8** One post a week that passed the card, or a written decision not to post.
- ☐ **Wk 9-12** Reread the posts closest to a client story. Delete, or leave up only if a colleague agrees no one is identifiable.

Measure: Posts that passed the stop rule. Silence counts.

Referral outreach

20 min/week

First action: Name three sources. Send the script to one. No gift, fee, or fee split.

- ☐ **Wk 1-4** Script sent to source 1. Follow-up date written.
- ☐ **Wk 5-8** Script sent to sources 2 and 3. One follow-up each, then stop.
- ☐ **Wk 9-12** Tracker updated. No second follow-up.

Measure: Conversations booked. Not clients promised.

Directory profile

15 min/week

First action: Open one listing and read it next to the must-say and must-not list on the referral sheet.

- ☐ **Wk 1-4** Must-say lines present. Must-not promises deleted.
- ☐ **Wk 5-8** Fees and telehealth limit match the website.
- ☐ **Wk 9-12** If you named insurance or hours, recheck them. Delete any line you cannot verify this month.

Measure: Date the listing matched the website. Not stars.

Paid ads, only if you spend

20 min, or zero

First action: Do not turn an ad on until one draft is marked on the ad sheet.

- ☐ **Wk 1-4** One draft marked. Failing lines rewritten before any spend.
- ☐ **Wk 5-8** If it is live, record inquiries that name the ad. Pause if a failing line is still up.
- ☐ **Wk 9-12** Decide continue, rewrite, or stop. Stopping is a complete week.

Measure: Inquiries you can tie to the ad. Not a cost-per-client target.

Pick one channel as the only new work this month. The others are maintenance. This checklist does not produce clients. It produces a practice a stranger can understand, and a record of what you actually did.

Google Business Profile setup sheet

Fill this before you save. Confirm every choice in the live profile editor. This sheet does not name a category for you.

Practice: _____ Profile URL: _____ Checked: _____ By: _____

1. Primary category

Write the category you will request, then open the live list in the editor and confirm those words still exist. Do not invent a category, and do not copy one from a blog.

Primary category you confirmed in the editor:

Additional categories, if the editor offers them:

2. Services list

Plain language. No outcome. No timeline. No "best" or "top."

1.

2.

3.

4.

Fictional example, not a category to copy: "Adult individual therapy. Couples therapy. Video sessions for clients located in the states where I am licensed."

3. Photos

- ☐ Exterior or door, if you have an office people visit
- ☐ Waiting room or desk with no client belongings in the frame
- ☐ A headshot you would put on a license wall
- ☐ No client, no session, no whiteboard with names, no before-and-after

Date photos last checked:

4. Hours and telehealth

Office hours you will actually keep:

Telehealth hours, if they differ:

One sentence a stranger can use: "Video sessions for people physically located in _____ at the time of the session."

- ☐ Hours on the profile match the week you will answer
- ☐ The telehealth sentence matches the website

5. Reviews response rule

Pick a default and write it. Either way, these hold:

- ☐ Do not confirm or deny that the writer is a client
- ☐ Do not mention diagnosis, session content, or attendance
- ☐ If the review names a clinical detail, do not answer the detail
- ☐ If you cannot reply without confirming care, leave it unanswered and note the date

A reply you can use when the review is general and does not identify care: "Thank you for writing. I am not able to discuss care in a public reply. The office phone is on the profile if you need to reach the practice."

My default (reply / leave unanswered) and why:

6. Posts never include

- ☐ A client story, even with the name removed, if the detail could identify them
- ☐ An outcome promise or a time-to-better
- ☐ A diagnosis used as a hook
- ☐ Another clinician's client, or a ranking you cannot show from a named source
- ☐ Crisis instructions that replace a number a person can call now

7. Monthly upkeep

Upkeep date:

- ☐ Hours still match. Telehealth note still matches. One photo still shows the practice, not a client.
- ☐ Reviews replied, or left unanswered on purpose. Post drafted against the list above, or no post.

Website page-by-page annotation key

Mark each line KEEP, FIX, or ADD. Examples are fictional. Replace the license, state, fee, and city with your own.

KEEP: the line does the job a stranger needs. FIX: the line is vague, promising, or unbounded. ADD: the element is absent. License type in the examples is illustrative. Do not copy LMFT or Oregon if that is not you.

Home	Who you see, where, and how to inquire. Not a result.
KEEP	Adult therapy in Portland. Licensed marriage and family therapist. A fit call is the first step, not a promise of an outcome.
FIX	if it says "Change your life in eight sessions."
About / licensure	License type, state, and number, or a link to the public lookup.
KEEP	Jordan Hale, LMFT. Oregon license [your number]. Confirm it on the state board lookup before you book.
FIX	"Jordan is a licensed therapist." ADD if the number is missing.
Fees	Amount, length, and whether you are in network.
KEEP	Individual session, 50 minutes, \$175. Not in network. A receipt you can submit is available on request. Payment is due at the session.
FIX	"Affordable therapy for everyone."
Specialties	Who you work with, and who you do not.
KEEP	Adults, on anxiety, grief, and relationship strain. I do not provide court-ordered evaluations or eating-disorder treatment.
FIX	"I treat all mental health conditions."
Telehealth	Where the client must be located at the time of the session.
KEEP	Video sessions for clients physically located in Oregon at the time of the session. A link the day before. If it fails, call the office.
FIX	"I see anyone, anywhere, online."
Crisis / contact	A number a person can use now, and a statement that the site is not a crisis line.
KEEP	If you are in immediate danger, call 911. In the US, call or text 988 for the Suicide and Crisis Lifeline, and confirm it routes before you rely on this page. This site is not monitored after hours.
FIX	"Email me if you are in crisis."

Your page

Page I am editing:

Line as it stands:

Mark: KEEP FIX ADD

Rewrite:

Social post rewrite card

Three before-and-after drafts, then a blank for the post in your drafts folder. Organic posts, not ads. Ads are the last sheet.

Draft 1	
Original	My client finally left her marriage after six sessions with me. If you are stuck, I can do the same for you.
Issue	A person a reader could try to identify, plus an outcome you are offering to repeat.
Rewrite	I work with adults who are deciding whether a relationship still fits. The first session is a fit conversation, not a promise of an outcome.
Why it holds	Names the work and the first step. No person. No result.
Stop rule	If the only interesting version needs someone's story, do not post.
Draft 2	
Original	Struggling with panic? I fix it fast. Comment CALM and I will send the protocol.
Issue	A diagnosis used as a hook, a speed promise, and care offered in a public comment.
Rewrite	I see adults who want help with panic, avoidance, and the planning that shrinks a week. If you want to ask whether we are a fit, use the contact form. I do not assess or treat anyone in comments.
Why it holds	Plain-language concern, a real intake path, and a refusal of care in public.
Stop rule	If the post asks someone to disclose a diagnosis in public, do not post.
Draft 3	
Original	Five signs your therapist is failing you. Number four is the reason you should switch to me this week.
Issue	Fear, a countdown, and an attack on another clinician used as the offer.
Rewrite	If you are wondering whether your current therapy is helping, that question belongs in the session, or in a consult with someone new. I offer a 15-minute fit call. I do not rank other therapists.
Why it holds	Leaves the existing relationship intact and offers a bounded next step.
Stop rule	If the post needs fear, shock, or a countdown to be worth posting, do not post.

Stop rule for any draft

Do not post if a client could recognize themselves, including from a detail you think is small. Do not post a sentence you would not say with their partner in the room. Do not give advice a stranger might treat as their treatment. Do not post because the week felt slow. If you are unsure, save the draft and look again in seven days. Not posting is a complete decision.

Your draft

Original post:

Issue you are marking:

Rewrite:

Why it holds:

Stop or post:

Referral outreach script

One source, one note, one follow-up, then stop. The directory list is on this sheet so the profile and the email do not contradict each other.

Referral source

Name, role, and how you know them:

Why this source, in one line (shared population, not "they have clients"):

Outreach script

Hello, I am [name], a [license type] in [city]. I see [age and setting] for [plain-language concerns]. I am writing because we may share families, and I want you to know how to reach me and what I do not treat. I do not treat [one clear no]. I return referral calls within two business days. I am not asking you to send anyone who is not a fit. If a ten-minute call would help you decide when I am the right next step, I am free [two windows]. [name, license, phone, website]

Name and license you will actually sign:

Who you see:

What you do not treat:

Two windows:

Follow-up

Once, ten business days later, then stop: "I sent a short note on [date] about how I take referrals. No need to reply if the timing is wrong. The same phone number is below if a fit question comes up later."

- ☐ Follow-up date written
- ☐ No second follow-up
- ☐ No gift, fee, or fee split. If you are unsure whether a thank-you is allowed, ask your board before you send it.

Directory profile must say

- ☐ Name, license type, license state, and the number or a lookup link
- ☐ Who you see (age and setting), and that an inquiry is not the start of care
- ☐ Fees, or a link to the fees page, and where a telehealth client must be located
- ☐ A crisis number that is not your inbox

Directory profile must not promise

- ☐ A cure, a timeline, or a percentage who get better
- ☐ That you are the best, top-rated, or the only ethical choice
- ☐ That a badge is a board endorsement, unless you have read the badge page and it says that
- ☐ Same-day crisis response, unless you staff it, or insurance you have not verified this month

Tracking

No clinical detail in this log. A name and a date are enough.

Source	Date sent	Follow-up	Reply y/n	Consult booked y/n

Marked ad examples sheet

Four original drafts. Three fail a practice rule. One passes. The rule named here is a practice rule, not a citation of a statute or a platform policy. Read those yourself before you spend.

FAIL Search ad draft

Ad	Anxiety cured in 8 weeks. Book today.
Marked	"Cured" and "8 weeks."
Rule	Do not promise a result or a number of weeks.
Rewrite	Anxiety therapy for adults in [city]. Weekly sessions. Ask about fit.

FAIL Social image ad draft

Ad	After six sessions, sleep came back. Yours can too.
Marked	A before-and-after result offered to the reader.
Rule	Do not use a result, even without a name, as the offer.
Rewrite	Therapy for adults who want help with sleep, worry, and the weeks that shrink around both. The first step is a fit call.

FAIL Directory tile draft

Ad	Best therapist in Austin. 5 stars. Insurance always accepted. Text me in a crisis.
Marked	"Best," "5 stars" with no named source on the tile, "always accepted," and "text me in a crisis."
Rule	No ranking you cannot show from a named source. No insurance line you have not verified this month. No crisis channel you do not staff.
Rewrite	[Name], [license], Austin. Individual therapy for adults. Fees on the website. If you are in crisis, call 911 or 988. This tile is not monitored as a crisis line.

KEEP Any platform, passing draft

Ad	Adult therapy in Portland. Licensed [your type]. \$160 per session. Telehealth for clients in Oregon at the time of the session. Contact form for a fit call.
Marked	None. Who, where, license, fee, location limit, and next step are all on the tile.
Rule	A passing ad can still be checked. It does not need a result to be specific.
Rewrite	No rewrite. Replace the city, license, fee, and state with yours before you use it.

Your draft

Platform:

Ad as written:

Phrase you are marking:

Practice rule:

Rewrite, then on or off: