

# THE 12 WEEK YEAR GETTING STARTED COURSE

Learn to apply The  
12 Week Year™ to  
reach your goals  
faster than ever before

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12 Week Year

Lesson  
#1

## VISION & PLAN

## Setting Up Your 12 Week Year™

A strong start creates momentum and this lesson is intended to get you up and running right away on your first 12 Week Year™. Using this document, you will create your long-term vision, your 12 week goal, and build your 12 week action plan.

### 1. LONG TERM VISION

The first step is to establish an emotionally compelling long-term vision. That is because when applying *The 12 Week Year™*, there will be some days when you just won't "feel like" taking action on your plan. To help you stay on track you need a powerful "why" – and that's your vision.

The most powerful visions address and align your personal aspirations with your professional dreams. That's because in the end, your professional vision often funds and enables your personal vision.

Take a few minutes right now and think about all of the things that you want to have, to do, and to be in your life. What is most important to you physically, spiritually, mentally, relationally, financially, professionally, and personally? How much time freedom do you want? What income do you need?

Now, in the space provided in the box below titled "Aspirational Vision," capture a compelling vision for your future – 5, 10, 15 years or more into the future:

#### Aspirational Vision:

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## 2. 12 WEEK GOALS

Next, set a specific and measureable 12 week goal that is aligned with your long-term vision, and that also represents greatness for you, *in and of itself*, in the next 12 weeks. The best 12 week goals are realistic, but are enough of a stretch that they will call on you to deliver your very best. Once you've decided, record your 12 week goals in the space provided below:

**12 Week Goal(s):**

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**Power Hint 1:** Share your 12 week goal with business partners and those close to you personally. By sharing your goal, and why it's important to you, studies have shown that you will "own it" more and be that much more likely to act on it.

**Power Hint 2:** At the beginning of each day, pull out your vision, and 12 week goal, and review them. Connect with what it would feel like to reach your biggest dreams. By doing this you are actually training your brain to act on your vision, and you are giving yourself the powerful "why" you need to stay on track.

Why is your 12 Week Goal important to you? If you hit it how would you celebrate?

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## 3. 12 WEEK PLAN

Now it's time to write your first 12 week plan using the template provided below. The plan is the roadmap needed to reach your 12 week goal. The best plans are focused on one or two things that you want to make progress on in the next 12 weeks. The fewer goals and weekly actions, the easier the plan will be to execute.

To get started, write the first element of your 12 week goal in the space provided next to "Goal 1." Write each additional element as a separate goal. Note, that you may only have one element, such as "lose 10 lbs.", or you might have two or more elements.

Next, for each of your goals, define the highest priority daily and weekly actions that you must take to reach that goal. Note: Some actions may be repeating (e.g. “working out each day”), while other actions will happen only once in the 12 weeks (e.g. “join a health club”). Finally, for each action, specify the week (1-12) that it comes due in the ‘Due’ column.

**Goal 1:** \_\_\_\_\_

Weekly Actions:

Due:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**Goal 2:** \_\_\_\_\_

Weekly Actions:

Due:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**Goal 3:** \_\_\_\_\_

Weekly Actions:

Due:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
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**Congratulations! You have just completed your first 12 week plan!**

Before you put your plan down, ask yourself these questions:

➤ What will you struggle with to take these actions? \_\_\_\_\_

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➤ What will you do to overcome those struggles? \_\_\_\_\_

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On the following pages you'll find 12 Week Year sample plans from our online system Achieve!



## Tom Preston's Goals and Plan

<b>Goal</b>
Achieve 60 new Car apps
Achieve 30 new Homes

<i>Goal: Achieve 60 new Car apps</i>				
<b>Tactics</b>	<b>Due</b>	<b>Begin in</b>	<b>End in</b>	<b>Completed</b>
Establish a list of clients w/o Auto	week 1			week 1
Order leads each month	week 2			week 2
Conduct staff training on asking for referrals	week 3			week 3
Track referrals weekly and review in staff meeting	each wk	week 1	week 12	
Call all Auto renewals weekly	each wk	week 1	week 12	
Contact 50 clients/wk off list	each wk	week 2	week 12	

<i>Goal: Achieve 30 new Homes</i>				
<b>Tactics</b>	<b>Due</b>	<b>Begin in</b>	<b>End in</b>	<b>Completed</b>
Pull list of all clients w/o Home	week 1			week 1
Order leads each month	week 1			week 1
Contact 2 new mortgage brokers/wk	each wk	week 1	week 12	
Contact 1 mortgage broker/day (existing relationship)	each wk	week 1	week 12	
Contact 50 clients from list each week	each wk	week 1	week 12	



## Susan Preston's Goals and Plan

### 12 Week Goals

For the Period ending 3/30/13 I will:

- Achieve 62,000 production credits
- Acquire \$1M under mgt
- Weigh 130 lbs

### Goal: Achieve \$62,000 production credits

Tactics	Due	Begin in	End in	Completed
Schedule and conduct 2 three-hour prospecting blocks each week	each wk	week 1	week 12	
Schedule 10 appointments/wk	each wk	week 1	week 12	
Conduct 2 client reviews every week	each wk	week 1	week 12	
Develop a prompter list	week 5			
Develop list of 8-10 COI's	week 2			week 1
Meet with a minimum of 1 COI/wk - get 3 referrals	each wk	week 1	week 12	
Ask for referrals at all opens, presents, closes	each wk	week 1	week 12	
Conduct 8 appointments/wk - 5 new	each wk	week 1	week 13	
Update pipeline with all opens, meetings, and closes	each wk	week 1	week 13	

### Goal: Acquire \$1M under mgt

Tactics	Due	Begin in	End in	Completed
Segment current client base and ID investment prospects	week 1			week 1
Meet with a minimum of 1 investment prospect weekly	each wk	week 1	week 12	
Meet with Top 25 investment clients - 2 per week	each wk	week 1	week 12	

### Goal: Personal Commitments

Tactics	Due	Begin in	End in	Completed
Work out 4 times/wk	each wk	week 1	week 12	
Date night 1/wk	each wk	week 1	week 12	
Read Bible daily	each wk	week 1	week 12	



## Bill Preston's Goals and Plan

### 12 Week Goals

For the 12 Week Year ending 12.31 I will:

- Raise \$5M in investor money for the Trust Deed business
- Secure \$1M in investor money for Real Estate
- Contract 8 properties

### Goal: Raise \$5M in investor money for the Trust Deed business

Tactics	Due	Begin in	End in	Completed
Update post card and print	week 3			week 3
Update investor mailing list	week 2			week 3
Send post card to targeted investor list	week 5			
Contact current investors and gain individual commitment	each wk	week 1	week 12	
Follow up with call to post card list - 10/wk	each wk	week 4	week 12	

### Goal: Secure \$1M in investor money for Real Estate

Tactics	Due	Begin in	End in	Completed
Blog 3x/wk	each wk	week 1	week 12	
Contact 2 investors/wk	each wk	week 1	week 12	
Ask for referrals in each investor meeting	each wk	week 1	week 12	
Solicit testimonial letters from current/past investors	each wk	week 1	week 12	

### Goal: Contract 8 properties

Tactics	Due	Begin in	End in	Completed
Contact real estate agents weekly	each wk	week 1	week 12	
Drive targeted neighborhoods each week	each wk	week 1	week 12	
Review Craig's list daily	each wk	week 1	week 12	
Review list of foreclosures daily	each wk	week 1	week 12	
Make a minimum of 1 offer/wk	each wk	week 1	week 12	
Attend Robyn Thompson Millionaire Mastermind Convention	week 4			



## 12 week year

### Sample Plan: Health & Fitness

#### 12 Week Goals

Improve my general health and fitness and lose 15 lbs.

**Goal: Improve my general health and fitness and lose 15 lbs.**

Tactics	Due	Begin in	End in	Completed
Get a complete physical and clearance to exercise from physician	week 1			
Select cardiovascular exercise - walking, jogging, bicycling, elliptical, etc.	week 1			
Do cardio exercise 4 times per week for a minimum of 20 minutes	each wk	week 2	week 13	
Select strength/resistance training exercises	week 1			
Do strength training 3 times per week	each wk	week 2	week 13	
Drink 6-8 glasses of water each day	each wk	week 1	week 13	
Keep a daily journal of food and drink consumer	each wk	week 1	week 13	
No fast food	each wk	week 1	week 13	
Do not eat after 8 pm	each wk	week 1	week 13	
Consume at least 3 helpings of fruits and vegetables each day	each wk	week 1	week 13	

## 12 week year

### Sample Plan: Getting Organized

#### 12 Week Goals

Get my life and home organized over the next 12 weeks

*Goal: Get my life and home organized over the next 12 weeks*

Tactics	Due	Begin in	End in	Completed
Pick a day each week and plan the meals for the week	each wk	week 1	week 13	
At the start of each month check for birthdays & special occasions	each wk	week 1	week 13	
Organize one drawer in your house each week	each wk	week 1	week 13	
Pick one room to clean and organize each week	each wk	week 1	week 13	
Create a file system for the bills	week 3			
Decide on a day and time each week to do laundry	each wk	week 1	week 13	
Create or check your emergency kit	week 4			
Clean out your car & organize the trunk/stowage	week 6			

## 12 week year

### Sample Plan: Business & Weight Loss

#### 12 Week Goals

For the 12 Week Year ending 6.30.13 I will:

- Close \$105,000 in new business
- Lose 12 lbs

#### Goal: Close \$105,000 in new business

Tactics	Due	Begin in	End in	Completed
ID top in-profile opportunities (min of \$10K) likely to close w/in next 12 weeks	week 1			
Call a minimum of 5 prospect/wk & schedule a min of 3/wk	each wk	week 1	week 12	
Conduct a minimum of 2 initial appointments per week	each wk	week 1	week 12	
Follow up with prospects weekly to close	each wk	week 1	week 12	
Create sales tracking wall graph & update weekly	each wk	week 1	week 12	

#### Goal: Lose 12 lbs.

Tactics	Due	Begin in	End in	Completed
Limit calorie intake to 1,200 or less per day	each wk	week 1	week 12	
Do 20 minutes of cardio at least 3 times/week	each wk	week 1	week 12	
Drink at least 8 glasses of water each day	each wk	week 1	week 12	
Train with weights 3 times/week	each wk	week 1	week 12	
Join a health club	week 1			