

12 week year

REVIEW & PLANNING WORKBOOK



CONGRATULATIONS!

If you are reading this then you have just finished a 12 Week Year™. The 12 Week Year is a powerful process that enables you to align your actions with your intentions and actualize the best you possible. This handout will take you through a robust review of the past 12 weeks – the good, the bad, the ugly. It is structured to provide valuable insight and promote learning that you can build off of in the next 12 weeks.

12 WEEK YEAR REVIEW

To begin, we will have you complete a comprehensive review of the 12 Week Year you just finished. An extensive and honest look into your results will be helpful in determining what was effective as well as areas where you can to improve.

RESULTS & EXECUTION

Measurement is the link with reality that tells you how you are doing – how your actions are impacting the world. Metrics provide you with important information you need to make intelligent and productive decisions.

In this first section we will have you document your results and your execution. Let's start with your results. For each goal mark the percentage of achievement. As an example is you accomplished 100% of your first goal, then you would check the box for 10. If you only accomplished about half of your goal then you would check 5. You get the idea.

GOALS		1	2	3	4	5	6	7	8	9	10	
GOAL #1	no real progress											accomplished goal
GOAL #2	no real progress											accomplished goal
GOAL #3	no real progress											accomplished goal

EXECUTION						
SCORES	WK1	WK2	WK3	WK4	WK5	WK6
<div style="border: 1px solid black; padding: 5px; display: inline-block;"> 12 Wk Average _____ </div>	_____	_____	_____	_____	_____	_____
	WK7	WK8	WK9	WK10	WK11	WK12
	_____	_____	_____	_____	_____	_____

Looking at your results and your execution, what insights can you draw – what worked, what didn't?

Did you average 85% or better on your Weekly Plan & Scorecard? If not, what do you need to do differently to achieve this standard?

QUALITY OF LIFE

The concept of life balance is an illusion. We're led to believe that somehow we can spend equal time in all the various areas of life – family, work, spouse, health, friends, and community. That's just not possible. And even if it were, I doubt it would create the joy and fulfillment that it promises.

Rather than seek life balance, we should strive for intentional imbalance. There will be times in life – seasons if you will, when you decide to spend more time in one area over another. There is nothing wrong with that. The key is that it is intentional, and by design.

In this section you will create a snap shot of six key life areas. As you complete this section, base your rating on your level of satisfaction in each area. Then identify the direction of movement with an arrow that points either left, if satisfaction is decreasing, or an arrow that points right if your satisfaction is on the rise.

QUALITY OF LIFE		1	2	3	4	5	6	7	8	9	10	
SPIRITUAL	Spiritually Empty, no Foundation											Living in alignment with beliefs
SPOUSE/KEY RELATIONSHIP	Relationship Strained, Unfulfilling											Relationship is Vibrant, Loving, & Full
FAMILY	Lack Quality Time, Don't Feel Close											Family Life is Full & Meaningful
BUSINESS	Not in Control, Lack Direction, Feel Frustrated											Business is Thriving & Fulfilling
PERSONAL	No Time for Self, Not Growing, Stagnant											Taking Life On with Energy & Enthusiasm
PHYSICAL	Poor Physical Condition, Poor Health											Excellent Physical Condition, Excellent Health

What areas are you pleased with?

What areas do you want to improve this next 12 weeks?

SUCCESS DISCIPLINES

This next grid represents the fundamental disciplines of success. There are five success disciplines, they are: Vision, Planning, Process Control, Measurement, and Time Use. Learning to effectively leverage these disciplines will lead to greater and greater success. Rate your level of engagement with these disciplines over the past 12 weeks.

SUCCESS DISCIPLINES		1	2	3	4	5	6	7	8	9	10	
VISION	Lack connection with Vision											Clear connection between Vision & daily activity
12 WEEK PLANNING	Did not have/use a 12 Week Plan											Created and used a 12 Week Plan
WEEKLY ROUTINE	Did not Plan, Score or WAM each Week											Used Weekly Plan, Scorecard & WAM
PERFORMANCE TIME	No Strategic, Break-Out, or Buffer Blocks											Effective use of Time Blocking System
KEY MEASURES	Not tracking critical measures											Effectively managing lead & lag indicators

Did you enter your plan into the online tool Achieve? ___ Yes ___ No

How many weeks did you print a Weekly Plan? ____

How many weeks did you participate in a WAM? ____
(Weekly Accountability Meeting - Peer Support)

How many weeks did you score your execution? ____
(Using the online tool Achieve)

As you review your engagement with these disciplines what insights emerge for you?

What discipline will you commit to leveraging more effectively this next 12 weeks?

BUILDING YOUR 12 WEEK PLAN


The purpose of a plan is to define what it will take to get you ‘there.’ If your Vision is the ‘what,’ then your 12 Week Plan is the ‘how.’

Remember that planning can be great fun. The process of thinking through, and then setting out what it will take to reach your goals, creates positive emotions and energy. It also makes your Vision seem more attainable. *You begin to shift from possible to probable.*

WHAT’S DIFFERENT WITH 12 WEEK PLANNING:

1. _____
2. _____
3. _____

STARTING WITH THE END IN MIND


Brian Moran's
12 WEEK YEAR™

Susan Preston's Goals and Plan

12 Week Goals				
For the Period ending 9/30/12 I will:				
- Achieve 62,000 production credits				
- Acquire \$1M under mgt				

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 3		
Develop list of 8-10 COI's		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	

Goal: Acquire \$1M under mgt				
Tactics	Due	Begin in	End in	Completed
Segment current client base and ID investment prospects		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 Commitment				
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	

Here is a sample **12 Week Plan**. In this lesson, you will create a similar plan. Plans have two tiers. They are:

12 Week Goals – this is where you want to be at the end of 12 weeks. It links to your vision. You may have multiple goals, just remember that “less is more,” the more focused your plan is the more effective you will be.

Tactics – this is how you will accomplish each Goal. For each goal you create tactics (actions) that you will take in order to achieve your goal.

How the plan is structured and written has a huge impact on your execution. Vague or poorly written goals and tactics will hinder effective execution. Likewise, a well-constructed goal is clear and precise, thereby making implementation easier.

PLAN CRITERIA

There are five criteria to adhere to when writing a plan:

1. Specific & measurable – Quantify and qualify. The more specific, the better!
2. Stated positively – Focus on what you want to happen that is positive. As an example rather than “quit smoking,” you would “become a non-smoker.”
3. Realistic stretch – If you can accomplish the strategy without doing anything different, then you probably need to stretch more; if it is absolutely impossible, then factor it back a little.
4. Accountability – Individual accountability is critical. Everyone’s challenge is no one’s challenge.
5. Time bound – There is nothing like a deadline to get and keep things moving.

12 WEEK GOAL

FOR THE 12 WEEK YEAR ENDING __/__/__ I WILL:

1. _____
2. _____
3. _____

MIND MAPPING EXERCISE



GOAL #1

12 WEEK PLAN WORKSHEET

12 WEEK GOALS

To ultimately live my vision, for the period ending ___/___/___ I will:

1. _____

2. _____

3. _____

Goal 1: _____

Tactics	Week Due
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A: _____	_____
-----------------	-------

B: _____	_____
-----------------	-------

C: _____	_____
-----------------	-------

D: _____	_____
-----------------	-------

E: _____	_____
-----------------	-------

F: _____	_____
-----------------	-------

G: _____	_____
-----------------	-------

Goal 2: _____

Tactics	Week Due
---------	----------

A: _____	_____
-----------------	-------

B: _____	_____
-----------------	-------

C: _____	_____
-----------------	-------

D: _____	_____
-----------------	-------

E: _____	_____
-----------------	-------

F: _____	_____
-----------------	-------

G: _____	_____
-----------------	-------

Goal 3: _____

Tactics

Week Due

A: _____

B: _____

C: _____

D: _____

E: _____

F: _____

G: _____