

12 week year

PLANNING



BUILDING YOUR 12 WEEK PLAN

In order to set up your 12 Week Year™, you will need to establish specific goals and tactics to build a 12-week plan and achieve your goals.

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

Bill Preston's Goals and Plan				
Goal				
Achieve unit production of \$525,000				
Generate 15 CPQ's and hire 2 new Advisors				
Goal: Achieve unit production of \$525,000				
Tactics	Due	Begin in	End in	Completed
Review each Advisors 12 Week Plan	week 1			week 1
Meet with all new org Advisors weekly and review Execution & Results	each wk	week 1	week 12	
Conduct monthly coaching session with all Sr. Advisors - 2 per week	each wk	week 1	week 12	
Conduct 5 joint work appointments each week with new org Advisors	each wk	week 1	week 12	
Chart team and individual production and progress towards 12 Week Goals weekly	each wk	week 1	week 12	
Goal: Generate 15 CPQ's and hire 2 new Advisors				
Tactics	Due	Begin in	End in	Completed
Meet with 2 COI's each week - min 4 candidate introductions	each wk	week 1	week 12	
Establish a recruiting pipeline and update weekly	each wk	week 1	week 12	
Pull 20 candidate names for cold sources each week and contact	each wk	week 1	week 12	
Meet with 1 advisor per week for candidate referrals - min 1 name	each wk	week 1	week 12	
Identify at least 2 candidates per week from personal observation	each wk	week 1	week 12	
Schedule 4 first interviews per week, conduct at least 3	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. Start with 1 - 3 goals and remember that “less is more.” The more focused your plan is, the more effective you will be. Think of goals as outcomes.

Tactics – this is how you will accomplish each Goal. For each goal you create tactics that you will take in order to achieve your goal. Think of your tactics as very specific actions.

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.

12 WEEK PLAN WORKSHEET

The **first step** is to set your goals. Using the vision work you completed in the previous handout, set a specific and measurable goal (or goals), for the upcoming 12 Week Year.

Your goal should represent realistic progress toward your three-year vision, and it should create excitement all on its own. You may find that you need more than one goal. Just keep in mind that “less is more.” It is important that you focus.

Once your goals are clear and focused, we move on to the **second step** where you will need to develop a plan to achieve them. At this stage, keeping it simple is the best approach. For each goal, determine the “critical few” actions that you will need to implement to achieve the goal. Write these tactics in a way that clearly describes the actions you will need to take.

When you’ve completed your plan worksheet, you can transfer your goals and tactics to *Achieve!*, under an Individual Plan or a Team Plan.

GOALS

Criteria for Writing Goals

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

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 “achieve a 2% error rate,” you would focus on “achieve a 98% accuracy rate.”
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.

TACTICS

Criteria for Writing Tactics

Tactics are action statements that describe the highest priority daily and weekly actions that you must take to reach each 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.

There are three criteria to adhere to when writing each tactic.

1. Sentence
2. Starts with a verb
3. Describes the specific action you will take

Goal 1: _____

Tactics (Actions)	Week Due
A: _____	_____
B: _____	_____
C: _____	_____
D: _____	_____
E: _____	_____
F: _____	_____
G: _____	_____

Goal 2: _____

Tactics (Actions)	Week Due
A: _____	_____
B: _____	_____
C: _____	_____
D: _____	_____
E: _____	_____
F: _____	_____
G: _____	_____

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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			



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			

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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	



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			



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	



Tom Preston's Goals and Plan

Goal
Achieve 60 new Car apps
Achieve 30 new Homes

Goal: Achieve 60 new Car apps				
Tactics	Due	Begin in	End in	Completed
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	

Goal: Achieve 30 new Homes				
Tactics	Due	Begin in	End in	Completed
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	