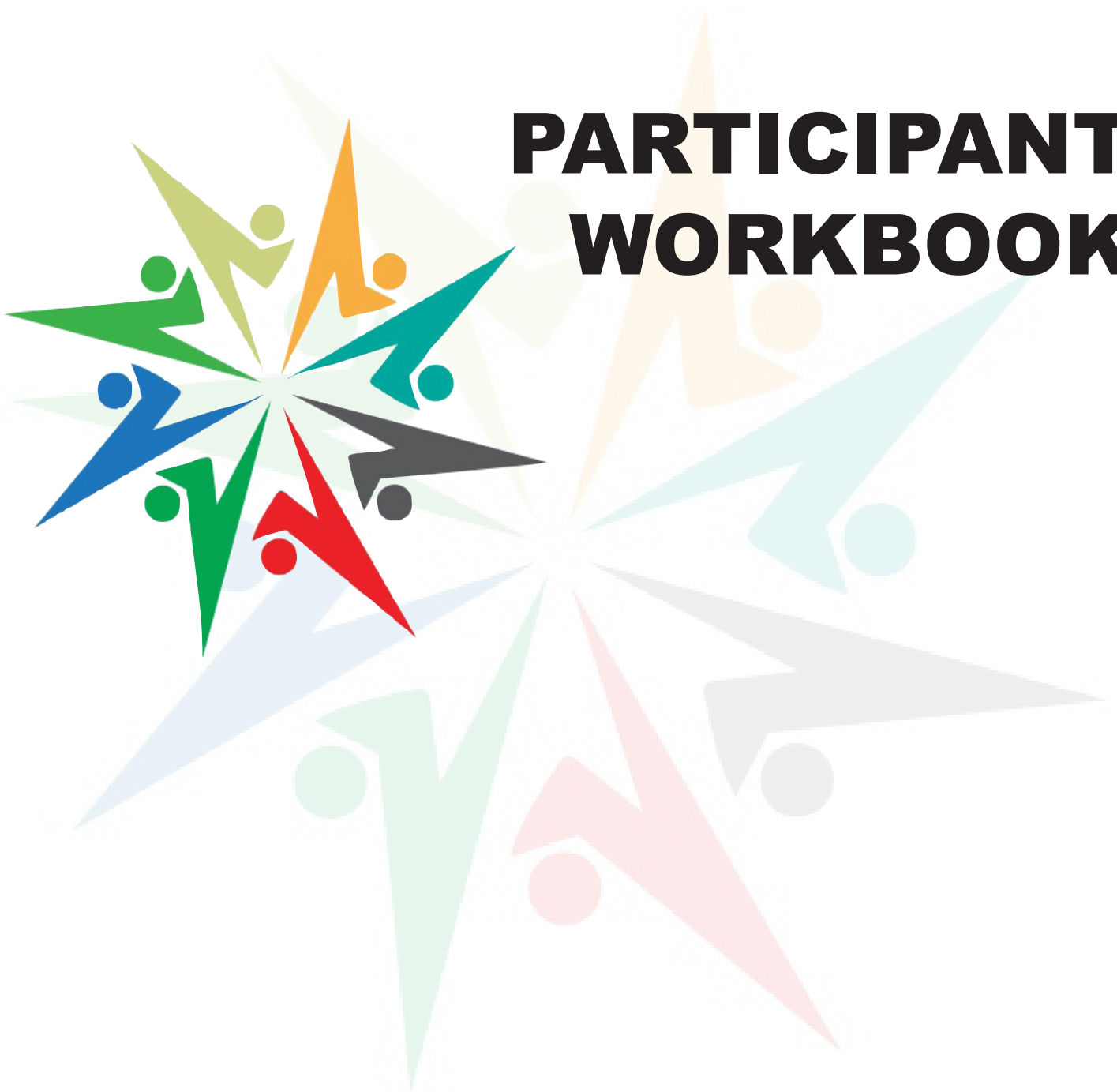


**12** week year  
**12 WEEK YEAR**  
**TEAM TRAINING**

# **PARTICIPANT WORKBOOK**



# WELCOME TO THE 12 WEEK YEAR

You now have in your possession the most powerful goal achievement system ever created. Just owning it won't do much for you though, you will have to work through it, and apply it. This Introduction guide will get you started on your way. In conjunction with the Introduction Video, it will provide you with an orientation to the system, processes and tools that will enable you to achieve more in the next 12 weeks than most do in 12 months.

## PERIODIZATION

Periodization began as an athletic training concept that we have adapted to business plans and goals. Using a 12 Week Year model, we move beyond training to focus on the critical factors that drive production and life balance. Periodization moves our thinking out of an annual environment. It provides us with the clarity of what matters most and a healthy sense of urgency to do it.

---

---

---

---

---

---

---

---

## 5 DISCIPLINES OF THE 12 WEEK YEAR

### 1. Vision

---

---

### 2. Planning

---

---

### 3. Process Control

---

---

#### 4. Scorekeeping

---

---

#### 5. Time Use

---

---

## 3 PRINCIPLES OF THE 12 WEEK YEAR

### 1. Accountability

Accountability is not consequences, it's \_\_\_\_\_!

---

---

---

### 2. Commitment

---

---

---

### 3. Greatness In The Moment

---

---

---

*“You can't build a reputation on what you're going to do.” - Henry ford*

# THE 12 WEEK YEAR PROCESS

Throughout the next 12 weeks we will guide, support, coach, and inspire you to accomplish the things that are most meaningful to you.

There is a philosophy and process that all successful people understand and utilize. The key to high achievement is to recognize that knowledge and intellect as well as strategy and ideas only matter if you implement: if you EXECUTE.

Knowledge is only powerful if you act on it. And great ideas are worthless unless they are implemented. It's not enough to know what to do. Knowing and doing are two very different things.

The 12 Week Year will teach you how to execute and provide you with the structure and tools to achieve your goals.

The process begins with you creating your personal long-term Vision, a closer 3 Year Vision, and 1-3 short-term goals to begin your first 12 Week Year. You'll then identify very specific key actions to accomplish each short-term goal. Your 12 Week Year Plan is then entered into *Achieve!* on our Member Site. *Achieve!* is our official software application. It will generate an organized Weekly Plan for you with the tactics (actions) that you need to accomplish each week. Our system also creates a dashboard that tracks your progress as you check off the actions you complete each week.

The 12 Week Year provides you with all the resources you need to be successful. With access to our Member Site, *Achieve!* and our training videos, you have everything you need to achieve your goals in just 12 weeks! Also, additional resources are available for you via "downloads" from the member site.

Make a commitment right now to take full advantage of all that The 12 Week Year has to offer you and get ready for a life-changing 12 weeks!

**Welcome to the 12 Week Year community!**

---

---

---

---

---

---

---

---

---

---

---

---

# ENVISIONING THE FUTURE

Big thinking always precedes big achievement. Our vision of the future will profoundly shape our destiny. Winston Churchill said: “The empires of the future are the empires of the mind.” We create things twice – first mentally and then physically.

It is essential that we think about, dream about, and ultimately envision our futures. A compelling vision provides meaning and direction. People with a vision can overcome seemingly insurmountable odds. Holding a clear picture in your mind of the desired future will mobilize your creative efforts and generate the desire and energy to perform.

All significant accomplishment began with someone daring to think it possible. So often we sell ourselves short, we aim well below our potential. You can do far more than you’ve ever dreamed or imagined. You are currently surrounded by breakthrough opportunities. Put aside the doubts and fears; claim the future! At this juncture knowing how you’re going to get there is not important. What’s important is knowing where you want to be. Once decided, you can determine the best route, and the appropriate tactics to get there. For now Focus on the Future.

*“The indispensable first step to getting what you want in life is this: decide what you want.” – Ben Stein*

---

---

---

---

# BUILDING YOUR VISION

In this **First step** you will be asked to do some initial vision work. While it sounds simple enough, vision work can require a fair amount of effort. In formulating our vision, we must let our mind expand to imagine and even embrace possibilities we often push aside in our daily lives as being not immediate enough to command our attention, impractical, or even too audacious to even consider, let alone pursue. There is no right or wrong answer in vision work.

Please get comfortable, remove distractions, and let’s get started.

On to Exercise #1 – creating your long-term vision....

## ASPIRATIONAL VISION

In this exercise we will start with a long-term, aspirational vision. Construct a vision of your life 5, 10, 15 years into the future. Be bold, be courageous; create a life vision that inspires you and fulfills your purpose. There are no right or wrong answers. This is the life you deeply desire.

*My Long-Term Vision*

---

---

---

---

---

---

---

---

---

---

## 3 YEAR VISION

The **Second step** is to bring your vision more near term and craft your three-year vision. Your three-year vision represents a stake in the ground for you. It is time-bound, and more specific than your longer-term vision. It represents progress toward your long-term vision, and it also defines what greatness looks like for you three years from today. It may include elements of your long-term vision, and will most likely be a mix of personal and business/career.

In the box provided, enter your age three years from today. Then determine what you want your life to be like in three years. Consider the following areas:

- Spouse, Family, Health, Spiritual, Social, Financial, Intellectual, Emotional, Life Style
- Income, Customer Profile, Marketing, Value Offer, Staffing, Strategic Partnerships, Time Off

My 3-Year Personal Vision \_\_\_\_\_ Age \_\_\_\_\_

---

---

---

---

---

---

---

---

---

---

## LEVERAGING YOUR VISION

Now that you have a compelling vision, the secret is to stay connected with it. Here are three things you can do to make it even more powerful:

### **Action 1: Share it With Others**

By sharing our vision we become committed to it. When we tell someone important to us what we want in life, we feel more responsibility to act.

### **Action 2: Stay in Touch with Your Vision**

Print it out and keep it with you. Review it each morning. Update it every time that you discover ways to make it more vivid and meaningful to you.

### **Action 3: Be Intentional**

At the end of each day, take a few minutes to reflect on the progress that you made today. Did it move you forward, or was it filled with activity that wasn't related to your vision? Resolve to be intentional to make progress on your vision – what action will you take tomorrow?

Armed with our vision for inspiration, it is time to begin the exciting process of creating your roadmap to the future of your dreams – your 12 Week Year™ Plan!

## 3 YEAR VISION

In this exercise we want you to envision yourself exactly three years from today. You are sitting in this room with these same people, only it's three years from now. Describe the organization. How has the firm changed? What degree of success have we achieved – revenue, # of advisors, production levels, etc.? What new opportunities have we undertaken? How have our products & services changed? What differentiates us from the competition? Describe the culture?

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

### Critical 3 Year Commitments

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---



# 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				
<b>Goal</b>				
Achieve unit production of \$525,000				
Generate 15 CPQ's and hire 2 new Advisors				
<b>Goal: Achieve unit production of \$525,000</b>				
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	
<b>Goal: Generate 15 CPQ's and hire 2 new Advisors</b>				
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
<b>A:</b> _____	_____
<b>B:</b> _____	_____
<b>C:</b> _____	_____
<b>D:</b> _____	_____
<b>E:</b> _____	_____
<b>F:</b> _____	_____
<b>G:</b> _____	_____

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

Tactics (Actions)	Week Due
<b>A:</b> _____	_____
<b>B:</b> _____	_____
<b>C:</b> _____	_____
<b>D:</b> _____	_____
<b>E:</b> _____	_____
<b>F:</b> _____	_____
<b>G:</b> _____	_____

# SAMPLE PLANS

## 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			



## 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: 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

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

### *Goal: Achieve 60 new Car apps*

<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	

### *Goal: Achieve 30 new Homes*

<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	



### 3. DON'T GO IT ALONE – PEER SUPPORT & THE WAM

You are 7 times more likely to be successful if you participate in some form of peer support. There was a study conducted with patients that had severe medical conditions that required lifestyle changes in order to live. What they found is that when patients attended group support sessions that their success rate was nearly 7 times higher. The groups not involved in peer support had a 10% success rate. Those participating in support had a 77% success rate. The lesson is clear, if you are facing change, don't go it alone.

A WAM (Weekly Accountability Meeting) is a critical element of your execution process. This is a short meeting (15 – 20 minutes) typically held on Monday morning with a small group of peers that have all agreed to support, challenge, and encourage one another.

Who will be on your support team:

#### WAM PARTNERS

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

#### The WAM Agenda

1. Individual Report Out
  - Results: Actual to Goal
  - Weekly Execution Scores
  - What's working, where I'm struggling
  - Group feedback
2. Encourage & Close

**The most effective lead indicator available to you  
is your \_\_\_\_\_!**

---

---

---

---

---

---

---

---

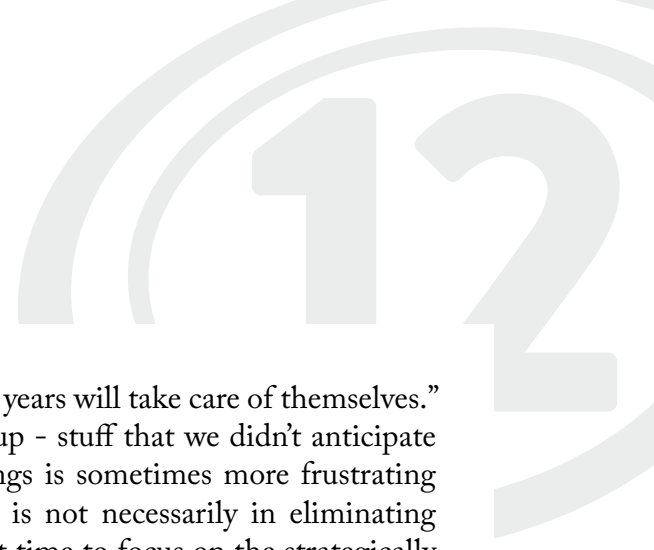
---

---

That's it, 3 simple steps that will take you approximately 20 minutes per week. Three steps that are easy to do, and even easier not to do. So make a commitment to incorporate the Weekly Routine. Will it be uncomfortable at times – yes. Will it be challenging at times – yes. That's what it takes to get better. But that's OK, you can handle it.

As you incorporate the Weekly Routine you will find yourself working with greater focus and getting results faster than ever before.

# BLOCKING



Benjamin Franklin said, “If we take care of the minutes, the years will take care of themselves.” The challenge is that throughout our week “things” come up - stuff that we didn’t anticipate that eats up valuable minutes. Trying to reduce these things is sometimes more frustrating than dealing with them. The key to successful time use is not necessarily in eliminating these unplanned interruptions but in regularly blocking out time to focus on the strategically important items, the “blue chips”.

Performance Time is a system that utilizes “time blocking” to maximize your effectiveness. There are three primary blocks: Strategic Blocks, Buffer Blocks, and Break-out Blocks.

**STRATEGIC BLOCK** – A Strategic Block is a 3 hour block of uninterrupted time that is scheduled in advance. During these blocks you accept no phone calls, no faxes, no e-mails, no visitors – no anything. You focus all your energies on the preplanned items – the strategic and money-making activities. Doing so concentrates your intellect and creativity, and produces breakthrough results. You will be astounded by the quantity and quality of the work you produce.

**STRATEGIC BLOCK ACTIVITY**

---

---

---

---

---

---

**BUFFER BLOCK** – Buffer Blocks are created to deal with all the unplanned items that arise throughout the day. Nothing is more unproductive and frustrating than having to deal with constant interruptions throughout the day. We’ve all had days where unplanned issues dominated our entire day.

A Buffer Block is a block of time set aside in advance to handle the unexpected. For some, thirty to sixty minutes once a day is sufficient. For others, two separate one-hour blocks may be necessary. By grouping together activities that tend to be unproductive we can reduce the inefficiency and take back control of our day.



**BUFFER BLOCK TASKS**

---

---

---

---

**BREAKOUT BLOCK** – One of the key factors contributing to performance plateaus is the absence of free time - so often entrepreneurs and professionals get caught up in working longer and harder. This approach is an energy and enthusiasm killer. In order to achieve greater results what’s necessary is not more hours, on the contrary, it is more free time.

A Breakout Block is a minimum 3 hour block of scheduled time that is devoid of any work related activities and thoughts. It is time scheduled away from the business during normal business hours. This time is designed to refresh and reinvigorate so that when you return to work you can effectively focus.

**YOUR BREAKOUT BLOCK ACTIVITIES**

---

---

---

---

---

The Time Blocking concept can be used for more than just Strategic or Buffer Blocks. The more you can structure your days and weeks the more effective your execution becomes. If possible, schedule routine tasks on the same day at the same time each day of the week. Also consider when you tend to be at your best. Are you a “morning” person or are you better in the afternoon or evening? Schedule the important activities during this time: Strategic and money-making activities, like your Strategic Block and coaching sessions.

**NOTES:**

---

---

---

# *model* WEEK



	Sunday	Mon.	Tuesday	Wed.	Thurs.	Friday	Sat.
7:00 am							
8:00 am							
9:00 am							
10:00 am							
11:00 am							
12:00 pm							
1:00 pm							
2:00 pm							
3:00 pm							
4:00 pm							
5:00 pm							
6:00 pm							
7:00 pm							

