



## 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 |           |



## 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 |           |



## 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  |          |         |           |