

12 week year

# PLANNING



# 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

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

**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 prospect list	week 1			
Develop list of 5-10 CDE's	week 1			
Meet with a minimum of 1 COB/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 12	

**Goal: Acquire \$1M under mgmt**

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	

**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

**A 'TACTIC' IS DEFINED AS:**

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## **12 WEEK PLAN WORKSHEET**

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

Tactics

Week Due

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

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

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

**4:** \_\_\_\_\_

**5:** \_\_\_\_\_

**6:** \_\_\_\_\_

**7:** \_\_\_\_\_

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

Tactics

Week Due

1: \_\_\_\_\_

2: \_\_\_\_\_

3: \_\_\_\_\_

4: \_\_\_\_\_

5: \_\_\_\_\_

6: \_\_\_\_\_

7: \_\_\_\_\_

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

Tactics

Week Due

1: \_\_\_\_\_

2: \_\_\_\_\_

3: \_\_\_\_\_

4: \_\_\_\_\_

5: \_\_\_\_\_

6: \_\_\_\_\_

7: \_\_\_\_\_