

# 12 week year

## Sample Plan: Financial Rep

### 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	