

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: _____	_____