

12 Week Year For Teams **LEADER GUIDE**

Implementing the 12 Week Year program as your team's execution, high performance and personal accountability system.

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PRE-TRAINING

Manager Introduction

Welcome to The 12 Week Year for Teams! We want to congratulate you on your decision to lead the 12 Week Year training, and thereby create a culture of high performance and personal accountability. You are about to begin an adventure in growth that will be both challenging and rewarding for both you and your team.

The 12 Week Year For Leaders will help you to install the 12 Week Year as your team's execution system. It has what you need to get your team up and running with the 12 Week Year regardless of your experience training others. As a leader you have access to the following on-line tools and materials to help you train effectively:

- 12 Week Year For Leaders Workbook with 12 Week Year training talking points,
- Video supported training materials for each module that play directly from the 12 Week Year Training For Teams website (<https://12weekyear.com/team-training>)
- Participant workbook PDF
- One month free initial subscription to The Accountable Leader program
- Access to Achieve! for up to 9 members of your team included.

Each participant in your training sessions will be supported by the participant workbooks that are downloadable on the 12 Week Year Training For Teams web page. Your team members will also have access to the Achieve! execution system through your annual license.

While the 12 Week Year For Teams program is designed to be turnkey, each module has a section that you will facilitate. By facilitating the training, you will effectively lead the implementation process. The training is best delivered in a group setting to optimize participation and buy-in. We will proceed as if you will present the material in a group setting, but everything we cover, you will be able to adapt to an individual setting as well, as needed for new team members.

Your leadership has a significant impact of the overall success of the 12 Week Year implementation with your team – that's why it is important to plan how you will support The 12 Week Year with your team before you conduct your training. What you communicate, what you role model, and what you recognize, are critical to optimizing your results.

Preparation prior to your 12 Week Year training sessions is vital for success. Practice your scripts, become familiar with the videos and technology. Be sure that your training room is set up and that the presentation technology works well in advance of the training.

If you have any questions or need further support, please reach out to us at 517.708.2096 or email us at Karen@12weekyear.com.

Getting Ready To Train

We have designed these 12 Week Year training materials so that you can effectively train your team within just a day or two of purchase. The key for success is to be familiar enough with the materials to ensure that participants get the most value from the training.

Managers Mindset

The 12 Week Year is a High-Performance system that creates a culture of discipline and accountability. The 12 Week Year will help your team members gain clarity on what matters most to them, and then align their personal goals and aspirations with the success of the team. It will help them understand the critical actions needed to accomplish the team goals. And it will create the personal ownership needed to execute the actions that have been assigned to them.

The 12 Week Year gets everybody in your team on the same platform - a high-performance platform where there's clarity of vision, clarity of goals and tactics, and with visibility into how they're executing. Further, The 12 Week Year allows you to help your team grow as their mentor and coach.

The benefits for you and your team from the application of The 12 Week Year are enormous. It makes the leader's job easier. Everyone is clear on what's expected and there is transparency and evidence as to whether or not it's getting done. The system allows you to pinpoint successes and breakdowns, so you can come up alongside the performer and coach effectively. It enables you to coach with choice and ownership, so that you get movement.

What happens with The 12 Week Year is that you accelerate the success cycle, and achieve greater levels of success in less time – ultimately accomplishing more in 12 weeks than most do in 12 months without “working harder”.

Knowing The Material









As the trainer you will want to know the material and be familiar with the flow of the session. In general, the more prepared you are, the better the session will go and the value to the attendees will be much greater.

There are five training sessions in all, each lasting about 90 minutes to two hours. These sessions will follow a step by step approach to install The 12 Week Year quickly and effectively with your team.

It's OK if this is your first exposure to The 12 Week Year. You can learn right along with your team, you'll just want to be a step or two ahead of them. If on the other hand, you've been applying The 12 Week Year then you will want to prepare some personal stories and experiences to help the attendees relate to the concepts being presented. Below is a recommended approach to preparing for your training sessions:

1. Read, or reread, The 12 Week Year.
2. Read through the Leaders Guide to gain a feel for how the training is organized and for the flow of the training days, and then scan it a second time and highlight the areas you intend to stress.
3. Run through the presentations on the website to familiarize yourself with each module's videos and scripts

Each script has icons that describe actions needed. These icons are:

 Say	 Do
 Play Video	 Key Point
 Group Video	 Give Time to Complete
 Group Discussion	 Lecture

Note: In the script there are also sections that are **greyed out**. These are not part of what you say, but are meant as directions and guidance for the presenter.

Day 1 Session Part I: Introduction

1. Overview of The Introduction Module
2. Learning Points From The Introduction Video
3. Introduction Training Outline

1. Overview:

The 12 Week Year is designed to help your team reach it's stretch goals, while at the same time helping the individuals on your team to identify what is important to them personally, and to make meaningful progress towards those personal goals as well - every 12 weeks.

The Introduction module kicks-off the implementation of The 12 Week Year. It provides an overview of the 12 Week Year execution system, and is intended to generate discussion, prompt questions, cover benefits, and surface and resolve concerns.

2. Video Learning Points:

The 12 Week Year helps teams to accomplish more in less time, not by "working harder," but by working differently. 12 Week Year practitioners consistently experience increased results and revenue, reduced stress, a greater sense of purpose, and improved confidence and self-esteem.

The 12 Week Year will help your team to execute more effectively, and consistently, on your most important actions. One of the key ways that the system works, is to get you out of the "annualized mindset" that generates the unproductive illusion that there is 'lots of time' to get things done. This illusion about time is one of the biggest barriers to effective execution because it reduces urgency and increases diffusion. With the 12 Week Year 12 weeks = 1 "year". This way of thinking about time creates clarity on what matters most and an urgency to get it done.

The 12 Week Year is also comprised of a set of high performance Disciplines and Principles:





The 5 Disciplines:

- Vision
- Planning
- Process Control
- Scorekeeping
- Time Use

The 3 Principles:

- Accountability
- Commitment
- Greatness In The Moment

3. Introduction Training Outline:

<p>Introduction To The 12 Week Year</p> <p> Do:</p> <p> Say:</p> <p> Play Video:</p> <p> Say:</p>	<p>Hand-Out The Participant Workbooks</p> <p><i>Welcome and thanks for being here! I have a favor to ask as we get started: please turn your phones on silent and don't use them during these sessions. As you know, we will be meeting this week for 90-minutes each day to learn together how to apply The 12 Week Year as a team and we need to stay focused and on the same page.</i></p> <p><i>The 12 Week Year helps individuals and teams to accomplish their biggest goals without working harder, or longer hours. In fact, many users find that work becomes less stressful and that the 12 Week Year actually creates more time freedom.</i></p> <p><i>In each of the daily sessions we will be showing videos of Brian Moran, co-author of the 12 Week Year, you can use these workbooks to capture learning from Brian's videos and any insights that occur to you as you participate. We will use these books in each session, so keep them and bring them back each day.</i></p> <p><i>We will start with an Introduction video from Brian Moran the co-author of The 12 Week Year - follow-along in your workbook to capture the ideas that Brian shares.</i></p> <p><i>Are there any questions?</i></p> <p>After answering any questions, play the 12 Week Year Introduction video. After the video is completed, turn off the video.</p> <p>What did you take away from what Brian said?</p> <p>Note: Let the discussion flow and encourage people to participate – it is best to hear what people are really thinking – not just the things that you want to hear. Hold the debrief lightly, and try not to make anyone “wrong” in their opinion.</p>
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If you get an objection or two amidst the questions, do your best to answer them if you feel confident, otherwise let them know that many of their objections will be addressed in the training. One of the most important goals of the training is to foster ownership of the team vision, goals, and tactics so it is important to let them voice both their excitement and their concerns.

Suggested Debrief Questions:

- What jumped out to you from what Brian said?
- What are some of the positive things you heard?
- What things, if any, concerned you?

If they don't get to the all of the concepts in the debrief, here are some additional questions to prompt the discussion:

- What is the 12 Week Year?
- What are the benefits?
- What is different about a 12 Week Year plan (as opposed to an annual 12 month plan)?
- What are the five 12 Week Year Disciplines?
- What are the three 12 Week Year Principles?
- Do we have to be perfect in our execution every week?
- What do we do if we have a bad week?



Say:

That's it for today. Keep your workbooks for tomorrow's session on Vision, it is at (remind of the time).

Any Questions?

Thanks – we'll pick it up from here tomorrow!

Day 1 Session Part II: **Vision**

1. Overview of The Vision Module
2. Video Learning Points
3. Vision Training Module

1. Overview:

Preparation:

Develop an initial team vision that, as the leader, you can have your team react to in the team visioning portion of the meeting. You may wish to print copies for everyone or write it on a white board. In either case, craft both an initial aspirational vision (10, 15 or more years into the future), and an initial 3-year vision.

In the initial team vision, include everything that is relevant that you want the team to take ownership of. Consider all the relevant elements that matter to you: revenue, team size, organizational structure and roles, new technology, new processes, new markets, ideal client profile, team culture, locations, office layout, how the team shares in success (salaries/bonuses/ownership), value offer, hours worked per week, time-off, developmental opportunities and so on.

Team Vision Part 1: Developing Individual Visions

Note: In this module, you are going to start by developing individual Visions for each of your team members. To facilitate this exercise, it is often helpful if you have already worked through developing your own personal vision (you can use the participant workbook and the vision video section on individual vision to do this).

Vision is the first Discipline of the 12 Week Year because it is the first place that you either expand, or limit, what you accomplish. Great accomplishments for teams, and for individuals, start with a great vision. That's why it is the first Discipline of the 12 Week Year.

The first exercise that you will lead (see page two of the Vision section of the participant workbook) is the development of the individual Aspirational Visions for each member of your team.

The second individual vision exercise is the development of the personal 3-year Vision for each team member.

The workbook includes language that provides general guidance for the development of both the Aspirational and Three-Year Visions.

Vision Part 2: Developing The Team Vision

The team vision is significantly shaped by the leader (that's you). In fact, we recommend that you have a vision for your team that includes a long-term team vision and a three-year team vision. To create these visions, work through the Vision Video and complete the participant workbook section for Vision on page 4. The initial team vision that you create will be the touch-stone for the visioning exercise with your team.

Once you have developed your team vision, you will get input and possible refinements and additions from your team in the training session that you will conduct.




2. Video Learning Points:

Vision is the first Discipline of the 12 Week Year because it is the starting point of all high performance, the first step to living a life of greatness. You will never outpace your mental models.

Your vision is the fuel you will need to step out and act to create the success in life that you want to create.

When you apply the 12 Week Year fully, it will cause you to stretch beyond what is easy – what you are comfortable with. You will be doing some things differently, and you will be doing some different things. Meaningful change almost always creates some personal discomfort. To work through the discomfort, you will need a compelling reason to take the new actions. That's why a compelling vision matters so much. Ideally you will want your vision more than you desire your short-term personal comfort. The goal is to have a compelling vision of a future that is bigger than, and better than, where you are today. Vision drives passion and passion drives the courage to act.

3. Vision Training Outline:

<p>Personal Vision Part 1:</p> <p> Say:</p> <p> Play Vision Video Part 1:</p>	<p>Now we are going to work through the first discipline of the 12 Week Year. First, we will build out personal visions for each of us, and then we will build our Team Vision.</p> <p>Any Questions?</p> <p>Play the Vision video and stop at 2:04 then debrief what they heard.</p> <p>Questions to guide the debrief conversation:</p> <p>Why does the 12 Week Year start with the discipline of Vision?</p> <ul style="list-style-type: none"> <i>It's the starting place of all high performance. It's the first place you either limit, or expand, your results in life – you won't outpace your mental models.</i> <p>Is it important to align your personal vision with your business vision? Why?</p> <ul style="list-style-type: none"> Passion comes from our personal life's vision. That's why we start there. The alignment between personal and professional makes sure that your professional vision supports the attainment of your personal vision. <p>What gets in the way when you have stretch goals?</p> <ul style="list-style-type: none"> You will have to sacrifice your personal comfort to get there. <p>How does vision help you to overcome that?</p> <ul style="list-style-type: none"> It provides the passion and courage to act (a meaningful "why") so that even when you don't feel like it, you will do it anyway.
<p> Play Vision Video Part 2:</p>	<p>Start playing the video again and stop it again at 4:00.</p> <p>Questions to guide the second debrief conversation:</p>

What did Brian say about creating your Long-Term Aspirational Vision?

- *Answers the question – What do you want in life?*
- *Ignore what others say – pursue what’s in your heart.*
- *Make it meaningful to you. Defines greatness for you.*
- *Being uncomfortable is part of the process.*
- *You are capable of more than you know.*

After the debrief:



Say:

Go to the top of page two in the Vision chapter of the Participant Workbook and capture your thoughts on what you would like your life to look like 5, 10, 15 or more years into the future. Use the “My Long-Term Vision” text box to do this.

Give them about 15 minutes to do this.



Say:

We have to continue now, but keep working on your Aspirational Vision over the next few days. Create a vision of your long-term future that is compelling for you – that you have an emotional connection to.

Okay, now we are moving to your visions a little closer to today – 3 years from today. Complete your 3 Year Personal Vision section at the top of page 3 in the Vision chapter of the participant workbook.

As they work on their 3-year vision:



Say:

Think about what it will look like 3 years from now if you, are making progress on your Long-Term Aspirational Vision. Be as specific as you can in this vision.

What kind of income will you have?

What work will you be doing? What is your role?

What skills will you have three years from today?

What will your personal life be like?

What will you be known for – how will people see you?

What impact will you be having 3 years from today?



Say:

Who would like to share theirs (be sure that this is voluntary)



Play
Vision
Video
Part 3:

After they have stopped sharing, play the next section of the Vision video on staying connected with their 3 -Year Vision.



Group
Discussion:

What did you hear in the video?

Question to support the 3-Year Vision debrief:

How did Brian suggest that you stay in touch with your vision and connect with it emotionally?

- *Align your 12 Week goals with it,*
- *Involve your family – create a family vision board,*
- *The more you engage with it the more benefits you get,*
- *Create a 3x5 vision card and check in with it in the morning every day,*
- *If the vision makes you uncomfortable – hold it lightly – don't have to be perfect.*

Part 2 Team Vision:



Say:

Now we are going to work on our vision for the team. I am going to start with my thoughts, but I need and want your input as well.

Share your Aspirational and Three Year Visions with the team. Read through them and explain the details.



Group Discussion:

Do you have any questions?

What are your ideas for changes and additions? I want you all to chime in here. What are we capable of doing as a team?

Whatever the level of detail you have in your initial vision, be prepared for, and elicit and encourage your teams feedback and input.

Be sure to listen to all of their ideas, discuss them, and capture their relevant ideas, and discuss why suggestions that you don't add might not be optimal. But remember, the more input and understanding they have – the greater their ownership will be.

The Team Vision development should be as collaborative as possible. The more input and understanding each team member has about the Team Vision and what went into it, the greater the ownership of the vision will be.

As you receive feedback on the vision, capture it and add what seems most relevant to the team vision in the session. Whether or not you add them all to the vision in the session, capture and record as many of your teams ideas as you can. You can use that list to reflect upon after the session and it may cause you to modify the vision even further.

Once you have incorporated the relevant ideas from your team, update the original vision and distribute it to the team at the next training session: 12 Week Year Planning.

Close:

That's it! Next time we will build the 12 Week Plan!

Day 2 & 3 Sessions: 12 Week Planning

1. Overview of The Planning Module
2. Video Learning Points
3. 12 Week Planning Training Module

1. Overview:

The 12 Week Year Planning Module will walk you and your team through the creation of a solid 12 Week Team Plan. Your team will learn how to set effective 12 week goals, and how to write sound tactics that can be executed as they are written in the weeks that they come due.

The 12 Week Year execution cycle is ideally suited for planning. There is enough time to accomplish great things, yet not enough time to lose the needed urgency and focus for effective execution. Even more importantly, the 12 week cycle allows you to get to the action level in your plan - something that annual plans cannot do due to the uncertainty that comes with longer planning cycles.

The 12 Week Plan is the engine that drives your results every 12 Week Year. This module will help you to create one that will help your team to accomplish what you are capable of – in the next 12 weeks!

Note: Good planning takes time. We have allotted two days for the planning session.

If your team completes the plan in one day, we offer an optional 90 minute plan review session with one of our certified 12 Week Year coaches. The 90 minute session could be conducted in lieu of the second planning day, or if two days are needed, the session can be scheduled in addition to the second planning day.

2. Video Learning Points:

This module will help the team to create meaningful and stretch 12 week goals as well as to write solid tactics to reach those goals. The first step is to set the 12 week goals.

There are 3 things that are different about 12 Week Planning from traditional planning:

1. Greater predictability
2. Greater plan focus
3. Allows a planning structure that has two levels – Goals (outcomes) and Tactics (Actions)

We have greater control over actions than we do outcomes and that is why 12 week plans are more effective than annual ones.

There are two types of plans: Individual and Team. Individual plans are used to accomplish individual goals such as weight loss or an individual sales goal. Team plans are used to pursue team or shared goals. For teams both goals and the tactics needed to reach them are shared. However, each tactic is assigned to only one person. More than one person might be needed to complete a tactic, but the responsibility for it's completion can belong to one person only.

The planning process starts by deciding on the goals (outcomes). *The goals describe where we want to be at the end of the 12 Week Year.*

With planning “less is more.” As a team it is best to set 1 to 3 goals each 12 weeks. If you put too much in the plan you are setting yourself up for failure, it is best to err on the side of less.

Well written goals are:

- Specific and Measurable
- Realistic Stretches
- Stated Positively
- Time Bound

Goals describe where you want to be in 12 weeks, tactics describe how you will “get there.” Each goal will be supported by tactics. Too often tactics are written conceptually. “Get referrals” is a good idea but a poor tactic – it can’t be executed.

A good tactic is a statement that describes an action you can take. For example, a better tactic would be: “Ask for referrals at each closing appointment.” That tactic can be executed as written every time it is due.

As with goals, less is more with tactics as well. Strive to add only “the critical few” to your plan. You want the least number of tactics possible to hit your goal. The objective is to create a simple straight-forward and powerful plan.





Each team tactic will be assigned a due date – designate when they come due in the 12 weeks. Some tactics are 1 time only (example: create a call script), while others will repeat from week to week (example: ask for referrals in every client meeting).

Tactics drive weekly execution. To be most effective, goals and plans must be focused. The tactics tells you and the team what matters most in the next 12 weeks. The weekly tactics are tied to making progress on your long-term vision.

Ideally planning is fun, because it creates clarity on what matters most.

Keep in mind that there are no perfect plans.

3. 12 Week Year Planning Training Outline

<p>12 MONTH VISION</p> <p> Say:</p> <p></p> <p>Play Video:</p> <p>Group Discussion:</p> <p></p> <p> Say:</p>	<p>Planning is the second discipline of the 12 Week Year. Planning in 12 Week Years is different from annual planning in several ways that make 12 week plans much more effective. Let's take a look at what Brian has to say.</p> <p>Play Planning Video.</p> <p>Video Debrief Questions:</p> <p>What were some of the points that Brian mentioned about 12 Week Planning?</p> <p>How is a 12 Week Plan different from traditional annual plans?</p> <p>What did Brian mean by "less is more?"</p> <p>What did Brian mean by calling goal outcomes?</p> <p>How are tactics different than goals?</p> <p>What are the criteria for good goals and tactics?</p> <p>OK, it's time to get started on creating our 12 week Plan!</p> <p>First, we are going to set our 12 Week Goals.</p> <p>Let's take a look at the 3-Year Business Vision we created earlier.</p> <p>Give them a minute or two to review the 3-Year Vision.</p> <p>What do we need to accomplish this next 12 months to be on track with our three year vision? In other words, "Where do we want to be four 12 Week Years from today?"</p> <p>What should our revenue target be for the next 12 months?</p> <p>What should our recruiting goals be?</p> <p>How many new clients do we want?</p>
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What else do we need to get done this year?

Allow the discussion to include back and forth exchanges. Be sure to challenge the team to set a realistic stretch for the 12-month objectives. Capture the agreed objectives and edit them as the team gains consensus.

As the leader, you have the final say, but remember the greater the input the team has at the vision at the goal setting and planning stages, the greater the buy-in later.



Do:

Once the 12 month objectives are finalized, be sure to capture them.



Say:

Now it's time to set our 12 Week Year goals.

As we set the 12 week goals, lets consider the most important progress we need to make in the next 12 weeks to reach out annual goal.

Ideally, we will only have one or two 12 Week Goals this first 12 weeks.

Let's start with our revenue or sales target for this next 12 weeks (We recommend that you set a revenue goal as one of your 12 Week Goals).

Just as with the 12 month objectives, allow the team to discuss what's possible and capture their thoughts until you reach a good level of consensus. Remember that you have the ultimate say so.

Try not to just divide the 12 month objectives by four. Discuss what the team has done in the past, and what the team is capable of accomplishing in the next 12 weeks.




Once the team has agreed on one or two 12 Week Goals, take a few minutes with the team to be sure they each meet the criteria for well written goals:



Say:

Is the goal both Specific and Measurable?

Is the goal a Realistic Stretch?

<p>End of Planning Day 1:</p> <p>TACTICS:</p> <p> Say:</p> <p>Group Discussion:</p> <p></p> <p> Say:</p>	<p>Is the goal Stated Positively?</p> <p>Is the goal Time Bound?</p> <p>Repeat this process for each goal you decide to pursue this next 12 weeks – but remember less is more. Ideally you will have no more than 2, or possibly 3, team goals especially in the first 12 Week Year.</p> <p>Note: depending on the time left, you can stop the planning session after the 12 Week Goals have been written, or continue through the tactics brainstorming session below.</p> <p>Now it’s time to set tactics for each 12 Week Goal.</p> <p>Note: Team brainstorming generates the best tactics. As you work on tactics, it is good to identify all the possible things you could do to hit each goal, and then narrow them down to the critical few tactics that will make it into the 12 week plan.</p> <p>Tactic Development:</p> <p>OK, now we are going to work on deciding what tactics we need to execute to hit our goal.</p> <p>We are going to use brainstorming. What is the one main rule of brainstorming?</p> <p>Every idea gets listed – no debate.</p> <p>After we get everyone’s ideas up, we will decide later which ones will make the final plan.</p> <p>Ready?</p> <p>What are the actions that we will have to do to hit the goal?</p> <p>For each 12 Week Goal, brainstorm all of the tactics that you might take to reach the goal, and write them on a flip chart, white board or capture them on the screen if you are using a computer.</p>
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Make sure someone captures the ideas as they are generated. A flip chart or screen is best as everyone can see what has been suggested.

No ideas should be rejected at this point – the goal is to exhaust the possible things that could be done to hit the goal.

Let the team get stuck and sit in silence 2 to 3 times as you work on tactics – some of the best ideas get generated once the surface level ideas are exhausted.

Once the brainstorming stage is completed, notice that some things are tactical and others are big groups of actions under one concept – that’s OK at this point.



Say:

Let’s decide which tactics are going to make the plan.

Which is the most important tactic?

Let the group come to a consensus (with your input), and circle that one.

If we only did that one “tactic” would we hit the goal?

If the answer is yes, then stop! If no, then ask them to pick the next most impactful “tactic” and circle it.

If we only did these two tactics would we hit the goal?

If yes, stop, if not, keep going with this step by step process until you identify the least number of tactics that will allow the team to hit the goal.

Repeat this brainstorming process for each goal the team will pursue this 12 weeks.







Once each goal has had tactics developed for it, it is now necessary to be sure that the tactics are written in a way that they can be executed.



Say:

A good tactic is a statement that describes an action that can be taken in the week that it comes due without any significant pre-work.

Are there any “tactics” that we picked that are combinations of several actions?

 Say:	<p>If yes, work with the team to break them into the individual actions that make them up.</p> <p>Once the tactics have been broken out, then re-write them as tactics that meet the criteria for a well-written tactic.</p>
 Say:	<p>To increase the odds that we will execute the plan, we have to be sure that the tactics are written correctly.</p> <p><i>Tactics start with an action verb, are a complete thought or sentence, and they can be executed in the week that they are due without significant pre-work.</i></p> <p>Let's work as a team to write each tactic to meet these criteria.</p>
 Do:	<p>Start with the first tactic of the first goal and edit it to meet the criteria. Continue until the tactics for each goal are well written.</p> <p>Once the tactics are completed for each goal, every tactic needs to be assigned a due date, (or a series of due dates for tactics that recur). Due dates are simply the week(s) that the tactic needs to be completed.</p>
 Say:	<p>Now that we have solid tactics, which weeks should each tactic come due in the 12 Week Year?</p> <p>As a team, work through each tactic and assign a week due (1 through 12). Note that some tactics are 1 time only (example: create a call script), while others will repeat from week to week (example: ask for referrals in every client meeting).</p>
 Say:	<p>Finally, each team plan tactic must be assigned to a single member of the team.</p> <p>Be sure to assign each tactic to one person on the team. While the tactic may require team-work to complete, the person who is assigned to the tactic makes sure that it gets done on time.</p>
 Say:	<p>That's it! Now all that's left is to execute! That's what we will cover in the next session.</p> <p>Once the plan is completed, enter it into Achieve!, and print copies for everyone.</p>

Day 4 Session: **Weekly Routine**

1. Overview of The Weekly Routine Module
2. Video Learning Points
3. Weekly Routine Training Module

1. Overview:

The odds of success are at best 50% if you stop with a Vision and a Plan. To increase your odds of success dramatically, you will need to make some changes in your daily routines to support your execution.

That's where The Weekly Routine comes in. It supplies some tools and events that will keep the team executing at its best each week of the 12 Week Year.

Before this session, it is a good idea to watch the Achieve! Tutorial video, sign into Achieve! and become familiar with navigating the site.

2. Video Learning Points:

The Vision is complete, the team's 12 Week Year Plan is in Achieve! Now we cover how to execute the plan in such a way that the team hits its goals 12 Week Year in, and 12 Week Year out.

The Weekly Execution Routine (WER) combines the third and fourth disciplines of the 12 Week Year: **Process Control and Scorekeeping**. The WER has three simple steps to follow each week to stay on top of your 12 week plan:

- The Weekly Plan
- Scorekeeping
- The Weekly Accountability Meeting

THE WEEKLY PLAN

The Weekly Plan is where the rubber meets the road. It is a 1/12 slice of the 12 Week Plan – it just includes the tactics due in the current week. Each tactic in the 12 Week Plan has a weekly due date. The Achieve! systems sorts through those tactics each week and generates the weekly plan. That way you just have to focus on what's due this week.

The Weekly Plan may just be a couple of things – but they are the critical few things that, if you get them done each week you give yourself the best shot of hitting your 12 week goals.

The Weekly Plan clarifies what matters most to the team – the stuff that has to get done to have a great week. Remember that you have greater control over your actions than you do outcomes. If you get the tactics done, the results will follow. When you have a few minutes open up in your week, go to your weekly plan to see what you can move across the finish line.

SCOREKEEPING

Measurement is the anchor of reality – it lets you know if the actions in the plan are creating the desired results.

The problem is that people often shy away from measurement. Measurement is associated with consequences and the fear that I won't look like I want to look.

However, just the opposite is true. Measurement improves success. But it should be well structured to get the benefits that are possible.

A focused combination of lead and lag measures is necessary to optimize execution. Lags are associated with the end results. If I want to lose weight, pounds lost is a great lag measure. If I want to hit a sales target, sales closed or paid is a good lag measure.

Lead measures track the things that lead to the lag results. To lose weight a good lead might be workouts per week or daily calories. Leads for a sales goal might be referrals received or sales appointments held. Leads tell me early in the process if I am on track or not.

You only need a handful - less is more. The most powerful lead indicator is a measure of your weekly execution – the percentage of tactics due each week that you get done. To calculate your weekly score on Achieve! just mark off the tactics that you completed, and the system will give you a score 0 to 100.

If you average 80% or more for the 12 weeks, you are likely to hit your goals. You don't have to be perfect to be successful. In fact, most score 65-75% - this is not failure. It just means you have more opportunity to get better. The question that should get asked is what's getting in the way of scoring 80%?

To execute well track your key measures: Lead and Lags and your weekly execution score. With that information you know the answer to two key questions: Am I executing well and is the plan working.

The most common source of breakdown is in the execution. Most people want to adjust the plan if they're falling short, but if you are scoring less than 80% confront the breakdown in execution first.

Remember that measurement is critical for success. You can't make needed adjustments if you are not measuring. In a 12 Week Year you need to be able to react quickly so that you can hit your goals in just 12 short weeks. In the end your weekly execution score is the single greatest predictor of your future.

PEER SUPPORT

At this point we've covered the Weekly Plan and Scorekeeping now we are going to discuss Peer Support.

If you go it alone with anything new the odds are stacked against you. Your odds of success dramatically increase with peer support. Peer support increases the odds that you will still be executing from the 12 Week Year execution system a year from today by nearly 8 times! Peers accelerate success.

The 12 Week Year uses the Weekly Accountability Meeting (WAM) to apply peer support. In our view accountability equals ownership. The goal is to take ownership of your choices.

The WAM is a weekly meeting where the team gets together to review results and how well the team executed together and as individuals. Each person in the WAM self-reports their execution score and the team reports out on the lead and lags. Peers can see how each member is doing to offer support, challenge, encourage, and to press-in.






If the team is scoring poorly they realize that if they want to hit their goals they can't afford to lose another week. Each team member should be willing to challenge and support every other member of the WAM.




The WAM is not a problem solving session – it's a quick meeting that is a difference maker in the scheme of a 12 Week Year. The meeting is between 15 and 30 minutes per week. Thousands are using the WAM to get better each week.

CLOSE

Execution is not necessarily easy but reaching the goals and your vision are worth it. Engage and stay with the process. Pay attention to feedback from your numbers and your WAM partners. Learn to recover quickly.

3. Weekly Execution Routine Training Module

 Say:	<p>At this point we have a Team Vision and a Team 12 Week Plan. That’s great, but the vision and a plan are worthless unless we execute them.</p> <p>That’s why the next concept we will cover is The Weekly Execution Routine.</p>
 Play Video:	<p>Play Weekly Routine video of Brian</p>
 Say:	<p>Ask: Are there any questions? What did you take away from Brian’s comments?</p>
 Group Discussion:	<p>To prompt discussion, consider the following questions to ask the team as starters:</p> <p>What is a weekly plan?</p> <p>Why is a weekly plan important?</p> <p>When should you print your weekly plan?</p> <p>Answer: after you score the previous week and before the new week begins – ideally first thing Monday morning.</p>
<p>Setting Up Lead and Lags</p>	<p>What are Lead measures?</p> <p>What is the most powerful lead measures?</p>
 Say:	<p>Answer: The Weekly Execution Score – greatest predictor of our future.</p> <p>What are Lag measures?</p> <p>Why do you need both Lead and Lags?</p> <p>What is the Weekly Accountability Meeting (WAM)?</p> <p>What are the benefits of the WAM?</p> <p>How long is a WAM and what do you talk about?</p>

	Say:	<p>Pull out your copy of the 12 Week Team Plan. What are some possible lead and lag measures for each goal?</p>
Achieve! Orientation		<p>After exploring the potential measures select the critical few lead and lag measures for each goal. Remember: "Less Is More".</p> <p>Keep in mind, raw numbers (like the number of sales meetings conducted) are better than %'s because when you have to do the mental math to figure out where the team is in respect to the 12 Week Goal, you lose clarity.</p> <p>Once you have identified the Lead and Lags for each of the team goals, sign into Achieve! and add them to the 12 Week Plan.</p> <p>Without signing off from Achieve!, next show the team where to score their execution each week, how to update key measures, and how to print a weekly plan. Note that the team should only update the team plan lead and lags in the team WAM.</p> <p>Decide together when the team WAM will happen (ideally Monday morning first thing before the new week starts) and how long the WAM will be scheduled for 15 to 30 minutes is ideal depending on the size of the team.</p>
	Do:	
Decide the WAM		
Close		
	Say:	<p>Congratulations, from here on out it's all about the execution!</p>

Day 5 Session: Time Use

1. Overview of the Time Use Module
2. Video Learning Points
3. Time Use Training Module

1. Overview:

One of the biggest and most common issues that performers encounter on a daily basis is that there simply isn't enough time to get everything done. As the average person's workload increases, the amount of time available to do it does not. Working harder only works up to a point. Eventually a choice has to be made – what to get done and what to be postponed, delegated, or eliminated. How a performer, or a team, makes those choices makes all the difference.

To further complicate the time allocation choice, more and more distractions and interruptions are arising in the workplace. Social media, texts, calls, emails, and so on create an ever increasing intrusive source of potential interruptions and distractions.

Further creating a crisis of time, is the human tendency to seek comfort. In fact, while the amount of work and the speed with which it needs to be completed is increasing, the average American worker wastes approximately 2 hours each day! Many people are wired to put difficult things off until they can avoid them no longer.

The combination of increasing demands, time in-elasticity, and the tendency to avoid difficult work is creating a crucible of stress and mediocre results. However, the real problem is that time is an inelastic resource. It cannot be saved for later, the allotment of time can't be increased - no one can get more of it, and it passes at the same rate for everybody. Since everything that gets done happens in the context of time, learning how to allocate it more effectively is a key component of sound execution.

Simply stated, everything that individuals and teams accomplish, is an outcome of how they spend their time. Those teams that perform significantly better than others are allocating their time more effectively – they spend more of their time executing their *highest priority actions*.

In general, there are two broad ways to allocate time. The first, and easiest way, is to simply react to what occurs, spending time on the emergent and urgent tasks of the day. This approach to allocating time is often referred to as reactive. Since there is a virtually inexhaustible supply of urgent tasks, the belief that one will get around to the strategically important tasks when the urgent stuff is handled is an illusion.

The second approach to allocating time requires more discipline and intentionality, this approach is often called proactive. In this approach, performers intentionally allocate more time to the strategically important, though often not urgent, tasks.

To help individuals and teams be more strategically effective with their time, we apply a time blocking approach called Performance Time. This approach allocates time each week to deal with the urgent tasks more efficiently, while at the same time isolating other activities from the constant barrage of interruptions.

2. Video Learning Points

Everything happens in the context of time, but if you are not in control of your time you are not in control of your results.

It isn't possible to eliminate distractions, instead carve out time for the important things each week.

Performance Time, the time blocking approach that we use as part of The 12 Week Year execution system, is the best system we know of to allocate time effectively.

The problem is that any time you change the way you spend time, you bump into the pain of change. That reality tends to keep people stuck, yet it also means that there is generally a lot of opportunity for improvement.

The concepts of Performance Time are the key – don't get caught-up in the mechanics at first.

There are three time blocks:

STRATEGIC BLOCKS

- Strategic Block:
- 3 hours in length
- Work on your business not in it
- Carve out time in the week to remove distractions
- If you have a door close it – if not, get to a conference room, or go off site if possible
- Focus on what matters most but may have its' impact in the future
- For most weeks 1 each week is plenty
- Carve out a 3 hour block – many practitioners get more important things done in three hours than they used to in an entire week

The content of a Strategic Block may include:

- Reconnecting with Vision – work on Vision if appropriate
- Conduct a business review – Plan and Tactics, Lead and Lags, Is the plan working?
What needs to change if it's not working
- Complete 12 Week Plan tactics that are due this week that are time consuming
- Working on a call script
- Rehearsing referral scripts
- No voice mail, incoming phone calls, or administrative
- Typically don't make outbound calls unless the calendar is bare – but not every week

This is not an agenda for every strategic block, just a list of things that fit into the category of "strategic."

BUFFER BLOCKS

To enable good Strategic Blocks, use Buffer Blocks. These blocks are designed to handle the interruptions and lower level tasks that you keep out of your Strategic Blocks.

Buffer Blocks typically range from 15 minutes to 60 minutes in length, and you may schedule one or two a day. It all depends on how much of this type of work you have.

Use the Buffer Blocks to handle email, voice mail and drop-in meetings. Don't act on these things as they come in. You lose 20 minutes or more for each interruption – even if it only takes a few minutes to do the work.

Group low-level items together and push them and quick meetings with other people to your Buffer Blocks. Some of the work goes away, the rest you will be faster at.

Thinking often gets in the way of pushing this activity off and not completing it right away. What if someone needs me or wants to buy something. Truly urgent things will get to you, the rest will still be there in a couple of hours.

Buffer Blocks are a great opportunity to get to-do list stuff done as well.

Breakout Blocks

The third time block is called a Breakout Block and is there to avoid burn-out.

A Breakout Block is three hours in length. The only real rules are don't do work or think about work in these time blocks.

Most people love these blocks. The best way to incorporate Breakout Blocks is to earn your way towards them by having great Strategic Blocks and Buffer Blocks.

Breakout Blocks are like mini-vacations in your normal work week. Play the Guitar, go to a museum, talk a walk – whatever.

Start with 1 Strategic Block per week, 1 to 2 Buffer Blocks a day, and maybe 1 Breakout Block per month at first.

MODEL WORK WEEK

Once you have understood the Performance Time blocks, it's time to create a "Model Work Week."




First, layer in when you want to have your Strategic Block. Next schedule your Buffer Blocks. Then put in your ideal Breakout Block time. Finally, schedule in the other things like prospect or client appointments, coaching sessions, administrative blocks, and standing meetings.





The key is to fit these blocks into your model week – remember to leave enough "white space" to handle the unexpected. If you can't make your time allocation work on paper, you won't make it work in reality.

Don't miss the concepts and get caught up too much in the mechanics. If you are "ADD", then try two 90 minute Strategic Blocks.

This will be a little uncomfortable at first, so stick with it, take ownership, make it work for you.

3. Time Use Training Module

 Say:	<p>Performance Time is the fifth discipline of the 12 Week Year, and it is one of the most powerful skills to master as a team. The way that we use time directly impacts the results we can achieve.</p> <p>Let's hear what Brian has to say about Performance Time.</p>
 Play Video:	<p>Play The Time Use video.</p>
 Say:	<p>Ask: What jumped out at you from the video? What did Brian say about Strategic Blocks?</p>
<p>Strategic Block</p>	<p>Questions to prompt discussion:</p> <p>What is a Strategic Block?</p> <p>How long is a Strategic Block?</p> <p>How many do you have in a week?</p> <p>What if you are ADD, how do you apply Strategic Blocks?</p> <p>What are some ways to keep the Strategic Block from being interrupted?</p> <p>How can we work as a team to respect others Strategic Blocks?</p> <p>What happens if someone really needs you and you are in a Strategic Block?</p> <p>Do you take interruptions in a Strategic Block? Why not?</p> <p>What are the things that you personally plan to use the Strategic Block for?</p> <p>Do you execute Tactics from your 12 Week Plan in the Strategic Block?</p> <p>What kind of tactics are suited to a Strategic Block?</p> <p>Do you typically make outbound calls in a Strategic Block?</p>

<p>Workbook</p> <p> Say:</p> <p>Buffer Block</p> <p>Group Discussion:</p> <p></p> <p>Workbook</p> <p> Say:</p> <p>Breakout Block</p> <p> Say:</p>	<p>Turn to the Time Blocking section of the handout and capture the things that you will use your Strategic Block for in the space provided.</p> <p>Now, What did Brian say about Buffer Blocks?</p> <p>What is a Buffer Block?</p> <p>How much time do you need for Buffer Blocks each day?</p> <p>What are some things that you work on in a Buffer Block?</p> <p>What are the advantages for doing emails, to-do lists, and other low-value actions in a Buffer Block?</p> <p>How do Buffer Blocks reduce interruptions across the week?</p> <p>Why is it faster to use Buffer Blocks to do Voicemails, Emails, Text Messages and so on in a Buffer Block?</p> <p>Take a few minutes and capture the tasks you plan to use your Buffer Block for. Use the blank section “Buffer Block Tasks” in the workbook to capture your thoughts.</p> <p>What is a Breakout Block?</p> <p>What do you do in a Breakout Block?</p> <p>Why is it important in a 12 Week Year to recharge with Breakout Blocks?</p> <p>How many Breakout Blocks will you schedule at first?</p> <p>What does Brian mean when he says to “earn your way to Breakout Blocks?”</p> <p>What are the risks of Breakout Blocks used improperly?</p>
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Workbook

Group
Exercise



Say:

Take a few minutes and capture in the workbook Time Use section for Breakout Blocks the activities that you would like to pursue in your Breakout Blocks.

Give them a few minutes to do this.

Great! Now it's time to create your Model Work Week!

On the last page of the Time Use section is a blank weekly calendar. We are going to take 10 to 15 minutes right now to create your model week. You will use this model week on the first day of the week to plan your activities.

Remember as Brian said, you will never work a week exactly like your model week. However, by creating one you create an intention for how to best spend your time each week.

That way when the inevitable interruptions and disruptions occur, you can quickly get back to allocating your time most effectively.

First you are going to put in your Performance Time Blocks.

Decide when you want to have your Strategic Block. Remember to schedule it early in the week so if it gets pushed, you have time to make it up later in the week. Also schedule it at a time when the interruptions from the phone, email, texts, and "drop-by" meetings is likely to be lowest.

Schedule your Buffer Blocks in next. The best way to schedule Buffer Blocks is to have them at the same time each day if possible. Decide how much buffer block activity you need and schedule the length and number of daily blocks accordingly.

Lastly you will schedule the time that you would take a Breakout Block if you have earned one.

Once the Performance Time blocks are in, add the time the team plans to WAM, and a 15 minute block to score and plan your week.

Next schedule blocks for your primary results-creating activity each week. These might include prospecting blocks, client meetings, administrative blocks, referral meetings, and any standing team meetings.

The best weekly calendars have sufficient white space to handle the unexpected and unplanned delays as well.

Once you have your completed ideal week, keep handy so that you can use it to plan your week on the first day of your week.

That's it!

We're officially "12 Week Yearified!"

Next week we start, so if you have not already done so, get your Personal Visions and Plans into Achieve! and remember to print your Weekly Plan on the first day of next week. I will be checking in with all of you to be sure that we start strong, and that you don't have any questions.

Thanks!

Now let's get to work!

Appendices:

Below is a suggested 4 week schedule to train the 12 Week Year with your team. It is meant as a guideline only.

One to Two Weeks Prior to Training

- Verify that the team will be available the week of the training
- Identify who will participate in the training and notify of dates
- Secure training location with screen for videos large enough for participants to view
- Contact Karen@12weekyear.com or call her at 517.708.2096. with technical issues
- Begin preparation to deliver session by practicing videos and scripts.
- Communicate any post-session events (such as the 12 Week Year Review and Planning session) and request that they put them in their calendars immediately
- Print Participant Workbooks (found on the 12 Week Year DIY site) for the 12 Week Year training modules.

One day before event, ensure room set-up is complete:

- Flip chart & markers
- Video equipment and speakers
- Test access to the videos (from the 12 Week Year DIY webpage)
- Refreshments (if planned)

At the end of the final training session, communicate the schedule of post-training events with participants:

- 12 Week Year Review and Planning Session
- Enter Vision and 12 Week Plan into Achieve! before the end of the training week
- Week 1 post training – Monday morning print Weekly Plan from Achieve!
- Week 2 post training – Score week 1, print week 2 plan, attend a WAM

12 Week Year For Teams

LEADER GUIDE

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