

FACILITATOR'S GUIDE

HALF DAY

12 Week Year Trainer



12 week year

INTRODUCTION

To The 12 Week Year



INTRODUCTION MODULE

PURPOSE:

- Create Interest and Excitement in the 12 Week Year
- Establish the value of Execution
- Overview the 12 Week Year
- Introduce the 12 Week Year Disciplines and Principles

EMOTIONAL CONNECTION:

The 12 Week Year will help you to perform at your best each day. What this means is that participants can get more of what they want in life, including greater income, more free time, and increased confidence and a sense of control.

MODULE AGENDA:

I. WELCOME

- a. Welcome to the session
- b. Personal Story
- c. Introduce Brian and the role of his videos

II. INTRODUCTION

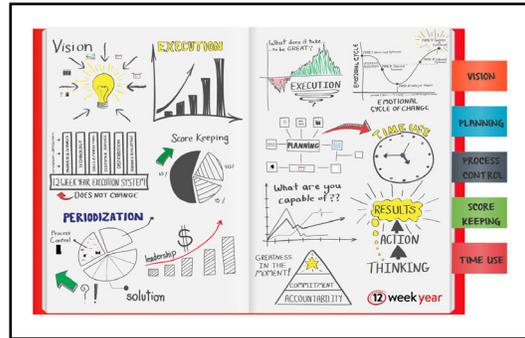
- a. Play VIDEO
- b. Discuss key points from video
- c. Their Expectations of The 12 Week Year

III. THE 12 WEEK YEAR EXECUTION SYSTEM

- a. 12 Week Year is similar to a computer's operating system
- b. The 12 Week Year is an execution system

TRAINER'S NOTES

WELCOME



Show first slide

Welcome to The 12 Week Year!

My name is _____ and I'll be your facilitator for this 12 Week Year session.

If not everyone knows you, state your position and give a brief overview of your professional background.

Today you are going to be introduced to The 12 Week Year. It is a system designed to help you accomplish more in both your personal, and business life.

We are very fortunate to have this opportunity to participate in what I know will be an incredible session for all of you, and a life changing experience for many of you.

When I was introduced to The 12 Week Year...

Tell your personal experience with The 12 Week Year; emphasize the changes in your thinking, your actions and your results. Mention any success stories in your firm that show what might be possible for them if they decide to apply The 12 Week Year.

I'm excited for each of you and the opportunity that you have to apply this powerful concept in your business and in your personal life.

Throughout the session you will hear not only from me, but also from the co-author of the book The 12 Week Year, Brian Moran.

Brian Moran is President and co-Founder of The Execution Company, and has over twenty-five years of expertise as a corporate executive, entrepreneur, consultant and coach.

TRAINER'S NOTES

Brian is an expert in the field of leadership and execution. He realized that most people don't lack for good ideas, but instead struggle with effective implementation of those ideas. This is what led him to the development of The 12 Week Year.

As we get started, please open your Participant Workbook to page 1, and use it to take notes and to capture your insights throughout the session.

Brian will share his thoughts and insights on each training segment throughout our session through short videos.

INTRODUCTION VIDEO

Here are his thoughts as we prepare to kick-off the 12 Week Year training:



*Play video
segment:
Introduction*



*Show 12 Week Year
calendar slide*

What are your thoughts on what you just heard from Brian?

Key Points:

- *Are you capable of more?*
- *To be great, it takes execution*
- *Our results in life are the outcome of our thinking*
- *Annualized thinking limits results*
- *Key is to shift thinking to 12 Week Years (not quarters or 90 day plans)*
- *5 Disciplines - Vision, Planning, Process Control, Scorekeeping, Time Use*
- *3 Principles - Accountability, Commitment, Greatness in the Moment*

TRAINER'S NOTES

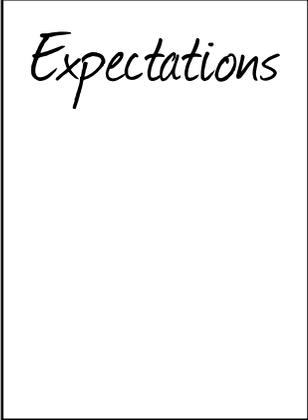
If they don't bring up the key points that Brian discussed, bring them up and ask what they thought about them.

What are your expectations for the 12 Week Year? The greater your expectations, the greater your potential results.

Capture as many expectations as possible on the flip chart.

The 12 Week Year is a system designed to help you execute more effectively. The fundamental breakdown in performance is not in knowing what to do, but actually doing it.

As Brian said, *"The best ideas and strategies are worthless unless they are implemented. The marketplace only rewards those ideas that get implemented."*



Expectations

With The 12 Week Year you will find yourself taking action on the things that matter most and accomplishing more in less time. At its core The 12 Week Year is a system that fundamentally changes the way you think and act.

Over the rest of today's session we will walk through the 12 Week Year Principles and Disciplines that Brian discussed.

EXECUTION SYSTEM

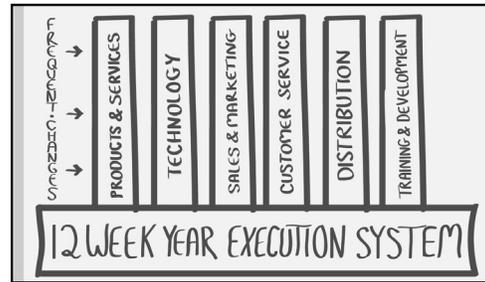
As you learn about the 12 Week Year, I think that it helps to think about the 12 Week Year as being similar to the operating system in your computer. No matter what other software you have, you must have an operating system to make it all function.

In the same way, The 12 Week Year is an execution system that helps all of your other systems to deliver. In a sense it is your personal and business operating system. Without an execution system your results will suffer.

It is important to realize that The 12 Week Year isn't added on top of all of the other things that you have to do, and all of the other systems that you already have. That won't work - you are already busy enough.

Instead The 12 Week Year becomes the foundation for all of your other systems. It becomes the way that you get things done.

TRAINER'S NOTES



*Show the Execution
System slide*

The 12 Week Year underpins all of your other existing systems, and all the systems that you will likely add in the future. Your marketing, CRM, technological, administrative, sales, products, and support systems are all executed through the 12 Week Year.

As your competitive environment changes, as the market shifts, you have to adapt. Your technology has to change to keep up with the market. So does your selling system, and your marketing system, and so on.

What doesn't change is your execution system - The 12 Week Year. The strategic actions that you have to take to implement and execute your other systems, are incorporated into your 12 Week Goals and Plan. Regardless of your changing objectives and systems, you always execute from your 12 Week Plan because your plan encompasses what you have to do to execute those systems and reach your goal.

Using this execution system, you become better and more consistent at getting the right things done. The 12 Week Year does not add to your work, instead it makes the work you are already doing more effective.

SESSION AGENDA

Now that we've set the stage, it's time to roll up our sleeves and go to work. Here's the agenda for the session:

Write out the agenda on a flip chart as you walk the group through it.

- *Vision: You will craft an emotionally compelling Vision that balances your personal and business dreams.*
- *12 Week Planning: You will set a meaningful 12 Week Goal and determine the actions to to achieve it.*
- *Effective Time Use: You will learn to use time blocks to take back control of your time.*

Agenda

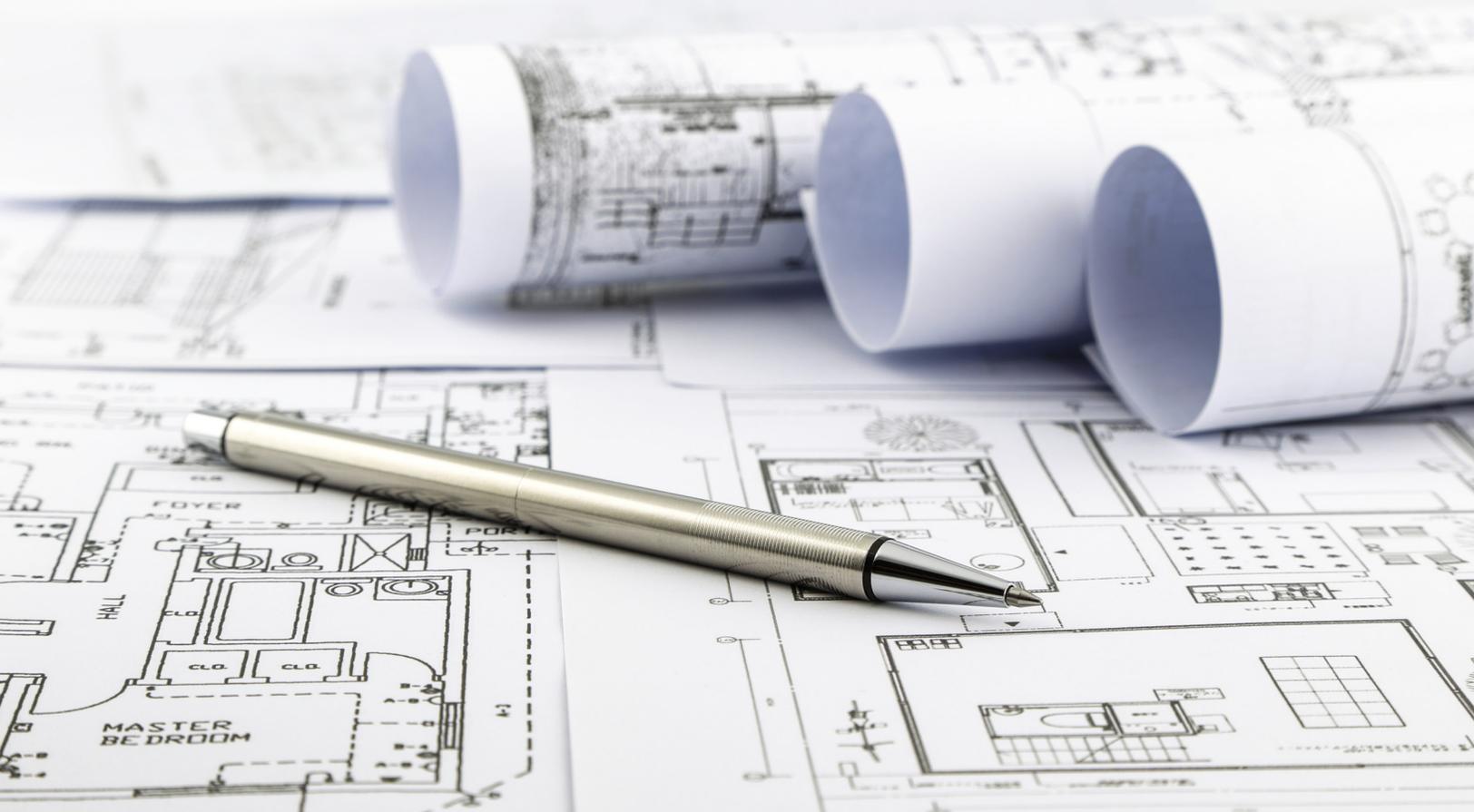
TRAINER'S NOTES

- *Accountability: You will learn how true accountability is the foundation of high performance.*
- *Process Control & Scorekeeping: You will learn how to apply the 12 Week Year tools to stay on track with your plan each week.*
- *Next Steps/Greatness in the Moment: You will learn how each moment is an opportunity to be great.*

Any questions before we start working on your visions?

Answer questions and transition to Vision Module.

PLANNING



PLANNING MODULE

PURPOSE:

- Establish benefits of planning – especially planning in 12 week cycles
- Learn to write goals & tactics that drive execution
- Create a focused 12 Week Goal & Plan

EMOTIONAL CONNECTION:

Planning is the first step to making your vision real. With a written plan your odds of success greatly increase. If your vision matters, then planning is a fun next step. When you connect your long-term vision to daily action then 12 week planning becomes exciting.

MODULE AGENDA:

I. INTRODUCTION

- a. Second Discipline
- b. Why plan
- c. 12 Week Planning - VIDEO
- d. Discuss key points from video

II. SETTING 12 WEEK GOALS

- a. Criteria
- b. 12 Week Goals
- c. Group discussion – critique 3-4 examples
- d. Dyad – tighten goals up

III. DEVELOPING TACTICS

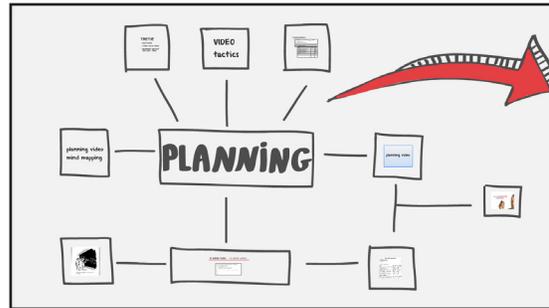
- a. Mind Mapping intro & example
- b. Dyad – mind map goal
- c. Sorting the items – VIDEO
- d. Discuss key points from video
- e. Select Critical Few
- f. Define tactic
- g. Writing tactics – VIDEO
- h. Discuss key points from video
- i. Create tactics
- j. Group discussion – critique 2-3 examples
- k. Dyad – tighten up tactics

IV. CLOSE

- a. Any questions
- b. Planning is skill set, gets easier, next plan better written
- c. No perfect plan – only way to know if plan is effective is to execute

TRAINER'S NOTES

INTRODUCTION



Show first planning slide

Planning is the second Discipline of The 12 Week Year. Once you have crafted a compelling vision, and have set your 12 Week Goal, the logical next step is to build a plan to achieve them.

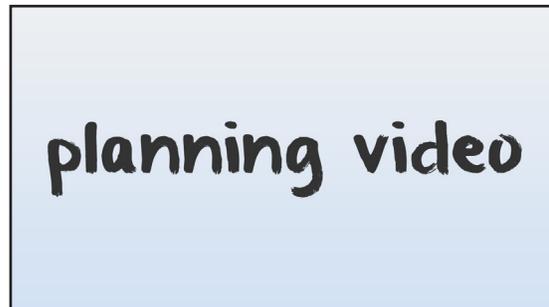
All of you have done some form of planning, why plan, what are the benefits of planning?

Typical responses:

- road map
- helps you track progress
- saves time
- ID key activities
- make mistakes on paper

Have each individual expand on their comment when appropriate

12 Week Planning is different than traditional planning in a number of ways. Let's see what Brian has to say about planning and the structure of a well written 12 Week plan. Turn to workbook page ____ and follow along.



Play video

| 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 promoter list | | week 5 | | |
| Develop list of 8-10 COFs | | week 2 | | week 1 |
| Meet with a minimum of 1 COF/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 calendar with all opens, meetings, and closes | each wk | week 1 | week 12 | |

Show slide

It often helps to see the end before you start. Here is a sample 12 Week Plan.

TRAINER'S NOTES

Point out the 12 week goals, the individual goal, and the tactics.

Ok, so what were your take-aways from what Brian said regarding planning?

Get a discussion going with the group. Be sure to reinforce the Key Points

Key Points:

- *Three things that are different:*
 1. *Greater predictability*
 2. *Increased focus*
 3. *Structured for implementation*
- *Less is more*
- *Goals as outcomes, tactics as actions*
- *Greater control of actions*
- *Tactical vs conceptual*

SETTING 12 WEEK GOALS

As Brian pointed out the planning process starts with our 12 Week Goals. Before I have you establish your goals let's review the criteria for writing effective goals and tactics. There are 5 criteria, they are in your workbook on page _____, what is the first criteria?



Show slide of "Setting Effective 12 Week Goals"

Go through the 5 criteria with the group – get them involved in the discussion as much as possible. Keep in mind that for most this is a review.

Write criteria on flip chart as group responds.

- Specific and Measurable – It is absolutely critical that you are able to define where “there” is. Some goals are more measurable than others. Sales goals typically lend themselves to specific measures, other goals like improving office productivity are less so. If you can't quantify it, qualify it – what will be different 12 weeks from today.

TRAINER'S NOTES

- Stated Positively – Words create focus, so we want to focus on the positive result. As an example, rather than stating my goal as a 2% error rate, which the central focus is on errors, how would I state that – Achieve a 98% accuracy rate.
- Realistic Stretch – This one is interesting because it varies by individual. The general rule is that if you can get there without doing anything different, then it's not enough of a stretch. If on the other hand you break out in a cold sweat when you write down the goal you might want to factor it back a little. A realistic stretch is achievable, but represents significant progress.
- Accountability – This shows up at two levels. First, don't put anything in your plan unless you are willing to own it. Second, if you have staff and you assign specific tactics to them you will need to get their buy-in.
- Time Bound – At one level the plan is bound by the 12 weeks. In addition though, each of your tactics will need specific due dates.

CRITERIA

- Specific & Measurable
- Stated Positively
- Realistic Stretch
- Individual Accountability
- Time Bound

Enough talking, it's time for you to set your 12 Week Goals. Just a reminder "less is more," - one, two or three at the most in any one area. When you have more than three goals in an area you are setting yourself up to struggle.

Also, I want you to think of your goals as outcomes, not actions. Here's an example.

12 WEEK PLAN
12 WEEK GOALS

FOR THE PERIOD ENDING _____ I HAVE/AM ...

- Submit \$45,000 in FYC
- Add \$900K in assets under mgt
- **12 WEEK GOALS**
-
-

Show slide of sample 12 Week Goals, and read the goals.

On page _____ is a section for you to write your goals. Write your goal in this way: "For the 12 Week Year ending month/day/year, I have" Then state what it is that you want to make happen over the next 12 weeks.

Give the group about 5-7 minutes to write their goals - remind them to focus on outcomes. Walk around the room and provide coaching.

TRAINER'S NOTES

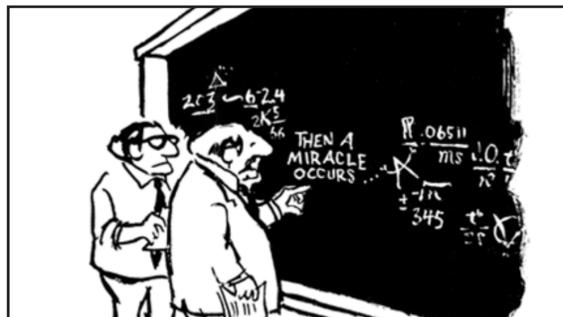
Does anyone need more time?

Ok, let's take a few examples and as a group we'll critique them as a learning experience.

Have 3-4 participants share one of their goals and have the group critique them using the 5 criteria. Refer them to the 5 Criteria on the flip chart. See if you can get one or two that are NOT written well and work to tighten them up.

DEVELOPING TACTICS

Alright, you have your goals: where you want to be 12 weeks from now. At this point we need to figure out the how – how do you get there. I have a fun cartoon for you.



Show cartoon, and read caption and punch line.

That's the way some people plan. I'm confident we can do better.

I think of planning as problem solving. The problem is how do you get from where you are to where you want to be.

MIND MAPPING

Most of us learned to problem solve in a linear fashion, or outline – step 1, step 2, ect. which limits the options we consider. There is a different way that creates a lot more output that you can then select from. Is anyone familiar with Mind Mapping?

If not you will be in just a moment. Mind Mapping is a method that allows you to creatively brainstorm all the possible actions that you could take. The great thing about Mind Mapping is that it isn't linear. We are going to use it to develop the tactics for your goals. In this way, you tend to get more ideas faster than with traditional step-by-step planning.

Let's see how mind mapping works.

TRAINER'S NOTES

Work through a Mind Mapping example with the group on the flip chart. Do not use a sample goal that many of the participants have as their goal, you want them to do that themselves. We typically use Referrals.



Start by drawing a circle in the middle of a page on the flip chart. Next write the goal such as "Generate 10 referrals per week" as an example and write it in the middle of the circle.

Ask the group "What are all the things we could do to generate referrals." As they respond, write their answers around the circle. You may group some together if they are related. Try to fill the chart – add some of your own if they are needed.

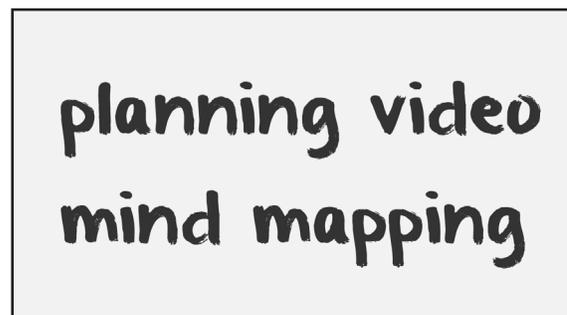
Keep working the group. Be patient, the process will seem to stall out two or three times, stay with it through at least three waves.

I want you to team up with one other person who has a similar goal as you. It may be a different level, in other words you may have a sales goal of "X" and your partner may have a goal of "Y" but they are both focused on driving sales, that's fine. Team up and mind map your goal. In your workbook there is a place for each of you to write it down. If you need any help call me over.

Give the group 5-8 minutes to complete the exercise.

How was that? Did you create a good list?

Ultimately, you don't have to do all these items to accomplish your goal. Let's see what advice Brian has for sorting through these.



Play video

TRAINER'S NOTES



Show slide

What did you take away from Brian’s video?

Key Points:

- *It’s not about creating a long list of items – looking for Critical Few*
- *List of concepts at this point – many items will have multiple tactics*

As Brian mentioned you want to go through the progression of questions to determine your critical few.

Go to your list and ask the question “If I could only do one thing from this list which one would have the greatest impact on me achieving my goal.” Circle that one.

Then ask the next question: “If I could only do one more thing which one would have the greatest impact on me achieving my goal.” Circle that one.

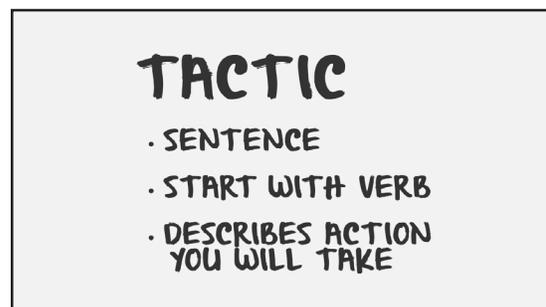
Then stop and decide if that is enough to accomplish your goal. Remember less is more. If you can get it done with 2, you don’t need 3. If it takes 5 or 6 than that’s fine. Keep it focused.

Give them just a few minutes to select their Critical Few.

CREATING TACTICS

At this point you have your Critical Few. These are still concepts only, not yet tactics. We need to turn these into tactics.

Let’s start by defining what a tactic is – please write this down.



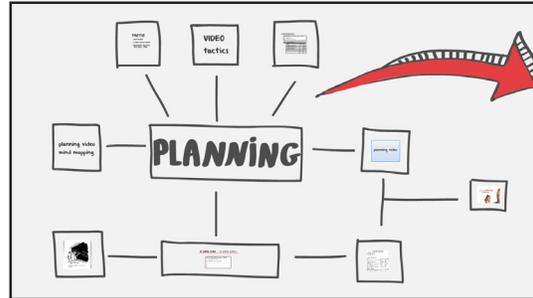
Show Tactic slide – and read through the points. A Tactic is a Sentence, typically starts with a Verb, and Describes an Action That You Can Take.

Brian is going to walk us through an example of creating tactics from your mind map. Let’s take a look.

TRAINER'S NOTES



Play video



Show slide

What did you hear?

Key Points:

- *Mind map items may actually be multiple tactics.*
- *It's critical that you write these as "sentences that describe the action that you will take."*
- *Stay away from words like communicate – instead write down what you will do, if it's call a group then write "call" if it's email then write "email" communicate is not definitive enough.*

This is where 12 Week Planning really separates itself from traditional planning in a big way. When you structure tactics in this way the execution becomes easier. If you're willing to put a little extra time in writing your plan, it pays big dividends during the execution phase.

Turn to page _____. On this worksheet you will want to restate the goal you mind mapped where it says Goal 1, and then turn your items into tactics. Here's my example.

| PLANNING WORKSHEET | | |
|---------------------------------------------------------|--------------------------------|------|
| 12 WEEK GOALS: FOR THE PERIOD ENDING _____ I HAVE/AM... | | |
| → | Submit \$45,000 in FYC | |
| → | Add \$300K in assets under mgt | |
| GOAL #1 <u>Submit \$45,000 in FYC</u> | | |
| TACTICS | WHO | DUE |
| a. Conduct 2 client reviews/wk | | Wk 1 |
| b. Establish list of 10 COI's | | Wk 1 |
| c. Meet with 2 COI's/wk - 4 ref | | Wk 2 |
| d. Schedule 2 connections/wk | | Wk 1 |

Show slide with goal and tactics and read through it.

Are there any questions? Go ahead and construct your tactics. Call me over if you need help or have a question.

TRAINER'S NOTES

Give the group 15-20 minutes to complete their tactics. As they write tactics walk around the room answering questions and offering suggestions.

Let's take a couple of examples and critique them as we did with the goals.

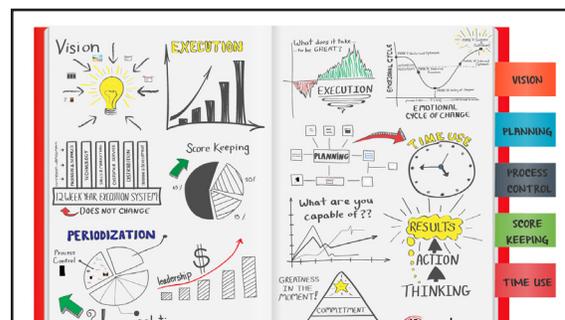
Have 3-5 people volunteer a tactic and have the group critique it and offer feedback. Use some of the examples that you saw as you walked around the room. Pick tactics that are not sentences or don't really describe an action that the individual can take.

Ok, turn to the person next to you and review each other's tactics and tighten them up as best you can.

Give them a few minutes to complete this task.

Any questions?

CLOSE



Advance slide to presentation map

Congratulations – you have just built your first 12 Week Plan!

A couple of final thoughts as we wrap this up.

First, there is no perfect plan. The objective is not to create the perfect plan, rather a solid plan that is implementation focused. Planning is a skill set and the more you do it the better you become. Your next plan will be better written than this one. That's ok. How do you know if your plan is any good or not?

Take answers.

You have to execute it, and then measure it – that's the only way. The first step though is creating a tactical plan that is focused on your highest priority goals and actions. That is what you now have.

Later today I will show you how to use Process Control and Scorekeeping to effectively execute your plan.

Good job everyone!

ACCOUNTABILITY

(Short Version)



ACCOUNTABILITY MODULE

PURPOSE:

- Understand the difference between Accountability and consequences
- Understand Accountability as ownership and choice
- Hold capable

EMOTIONAL CONNECTION:

Debunk Accountability as consequences. Understanding accountability as ownership is empowering and freeing, and allows you to take control of your destiny.

MODULE AGENDA:

- I. INTRODUCTION AND OVERVIEW**
 - a. VIDEO – Accountability as ownership
 - b. Group discussion – reinforce key points
- II. CLOSE**
 - a. Change your thinking regarding accountability
 - b. Game changer

TRAINER'S NOTES

INTRODUCTION & OVERVIEW



*Advance slide to first
accountability slide*

I want to spend just a few minutes on the concept of Accountability.

If you've read *The 12 Week Year* then you know Brian & Mike (Lennington – co-Author) have a very different view on accountability. Let's hear what Brian has for us.



Show accountability slide

What resonated with you from what Brian just said?

Facilitate a robust discussion with the group. Be sure to reinforce the key points.

Key Points:

- *Accountability is not consequences, it's ownership*
- *We always have choice*
- *We only control two things: our thinking and our actions*
- *Stop looking outside yourself*
- *Scrub the notion of "holding others accountable" instead hold the "Capable"*

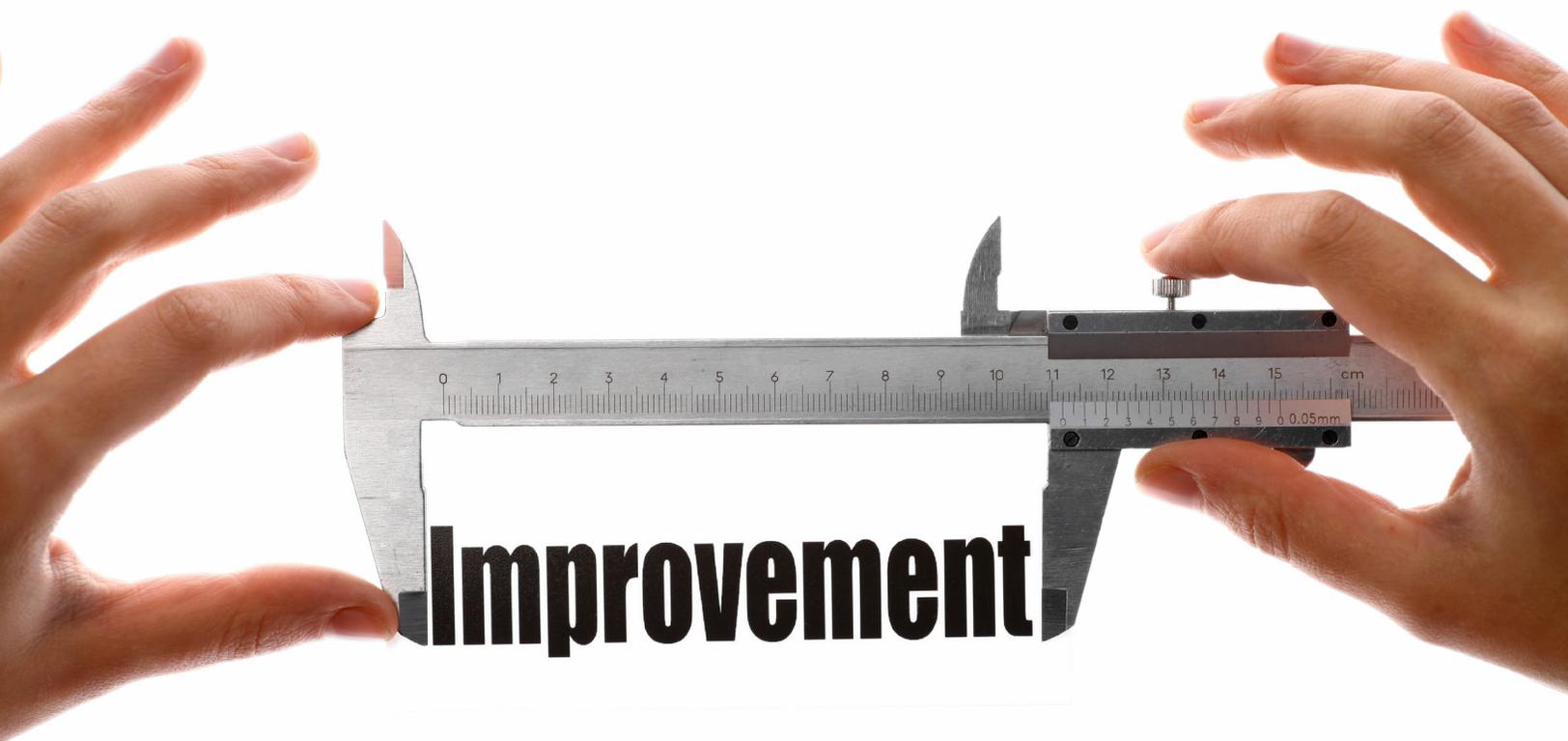
TRAINER'S NOTES

CLOSE

I love what Brian said: “The quality of our choices determines the quality of our life. There are no Have-To’s in life.” In the end accountability is not consequences it’s the realization that we always have choice and taking ownership of our choices.

I’m not sure what your thinking was regarding accountability before today, but when you really understand accountability as choice & ownership it’s incredibly empowering and is a game changer.

PROCESS CONTROL & SCOREKEEPING



PROCESS CONTROL & SCOREKEEPING MODULE

PURPOSE:

- Understand how simple execution tools and events help you to be more successful
- Build in process and structure for greater consistency
- Learn to leverage the Weekly Plan and engage in peer support
- Understand how important measurement is to accomplishing your goals
- Identify a set of lead and lag indicators
- Understand that an execution metric is the best lead indicator we have
- Understand how to effectively use a Weekly Scorecard

EMOTIONAL CONNECTION:

If you've ever wondered how champion athletes and top producers seem to be so disciplined, here's their secret – they build in process to help them do what needs to be done. Process control is a set of tools and events that you can lean on when you don't feel "motivated" to do what you need to do.

In order to make intelligent game-time adjustments you need to measure. Without measurement you are handicapping yourself and greatly reducing your odds of succeeding.

MODULE AGENDA:

I. INTRODUCTION

- a. Emotional Cycle of Change
- b. The Weekly Routine & Weekly Plan – VIDEO, discuss key points

II. THE WEEKLY PLAN

- a. Key points of the Weekly Plan
- b. Breakdowns - what might get in the way of using the Weekly Plan

III. PEER SUPPORT

- a. 7 times more likely to succeed with peer support – VIDEO, discuss key points
- b. The WAM,
- c. Form WAM groups
- d. WAM agenda
- e. Breakdowns discussion

IV. SCOREKEEPING

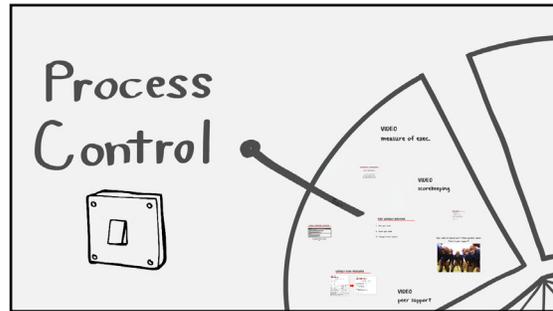
- a. Maslow & Herzberg – VIDEO, discuss key points
- b. Lead & Lag indicators – Flip chart, participants select
- c. The Weekly Scorecard – VIDEO, discuss key points
- d. Weekly Scorecard – discuss how to use
- e. Breakdowns discussion

V. CLOSE

- a. Pain of change – bump into habits & systems – trust the tools & events
- b. Engage – not about being perfect

TRAINER'S NOTES

INTRODUCTION



*Advance to first
Process Control
slide*

At this point you have a compelling vision and a 12 Week Plan. The third and fourth disciplines of The 12 Week Year are Process Control & Scorekeeping and they come together in the concept of The Weekly Routine.

I want to share with you a framework that will be helpful as you move forward with installing The 12 Week Year into your practice and also with really any change you face in the future.

EMOTIONAL CYCLE OF CHANGE

The Emotional Cycle of Change describes how individuals and organizations experience change.

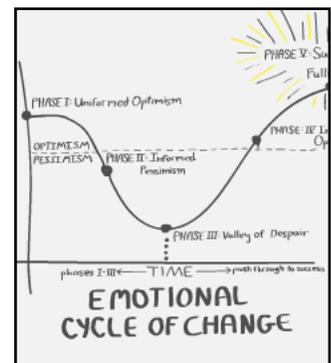
Draw ECOC graph on flip chart as you talk through each phase

For every change there is an initial high called *Uninformed Optimism* (Phase I). At this phase, most of the benefits of an idea are apparent (and sometimes overestimated); while at the same time few of the costs are known.

Phase II is called *Informed Pessimism*. This phase is characterized by rapid declines in the 'three E's' (emotion, energy, and enthusiasm). The costs of change are very clear at this point and many of the benefits don't seem within reach.

This second Phase leads ultimately to Phase III which we call the 'Wall' or the 'Valley of Despair'. At this point most people and organizations give up. In fact, some people and organizations develop the habit of cycling between the first three phases – never fully realizing most of the initiatives they undertake – literally train themselves to run this loop.

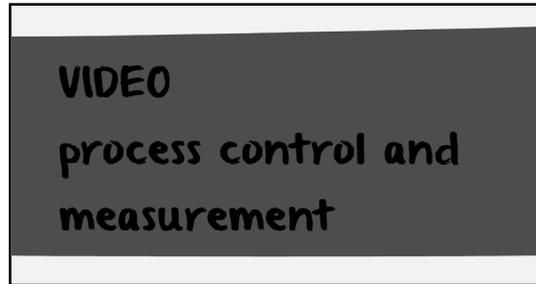
Truly great performers develop the habit of pushing through Phase III to Phase IV - *Informed Optimism* where the benefits of the effort begin to materialize. This phase is characterized by a realistic view of both the challenges and the benefits of the effort. Individuals then progress to Phase V where results are realized – *Success & Fulfillment*.



TRAINER'S NOTES

This is why Vision matters. Without a compelling vision it's too easy to choose what is comfortable and familiar. This is also where Process Control comes in.

Process Control is the tools and events that keep you working the plan. Let's hear Brian discuss Process Control.



Play video



Advance to show Weekly Routine slide.

What did you take away from the video?

Key Points:

- Tools and events to enable us to execute effectively
- The 3 steps of the Weekly Routine
- Vision – one time, Planning – once every 12 weeks
- The Weekly Plan

As Brian mentioned there are three steps to the Weekly Routine. The first is the weekly plan, the second is peer support, and the third is score keeping. Let's start with the weekly plan.

Ok, what were your take-aways from what Brian said regarding the Weekly Plan?

THE WEEKLY PLAN



Show slide of Weekly Plan and discuss the Key Points

TRAINER'S NOTES

Key Points of Weekly Plan

- *1/12 slice of 12 Week Plan*
- *Doesn't contain everything you do – just plan items due this week*
- *Contains most important actions for the week*
- *Use it to manage and guide each day and the week*

The Weekly Plan is a powerful tool that translates the 12 Week Plan to daily and weekly action. The Weekly Plan is the instrument that organizes and focuses your week. It becomes your game plan for each week. It is not a glorified “to-do” list; rather it reflects the critical strategic activity that needs to take place this week in order to achieve your goals.

What might keep you from consistently using this tool? *Take comments. Get as much discussion going as you can.*

Any other questions?

Step one of the Weekly Routine is _____? (The Weekly Plan), Step 2 is _____? (Peer Support). Let see what Brian has to say regarding peer support.

VIDEO
peer support

PEER SUPPORT

Advance slide to football team and read the caption

Ok, so what were your take-aways from what Brian said regarding Peer Support?

TRAINER'S NOTES

Key Points of Peer Support

- *Don't go it alone – 7 times more likely to*
- *Meet with a couple of peers 1/wk for 15 minutes*
- *Hold each other capable, challenge and encourage*
- *With peer support you'll stay the course*
- *Ideal WAM group size is 3-4*

The Weekly Accountability Meeting (WAM) is another way to help you stay on track with your 12 week plan each week. Research shows that if you meet with peers weekly to discuss progress you are 7 times more likely to stick with your plan and thus reach your goals.

The WAM is not a punitive session where we try to “hold people accountable,” and dole out negative consequences for those who are faltering. Just the opposite, we hold each other capable, challenge & support one another.

ESTABLISHING WAM GROUPS

I want to remind you that there are no Have-To's in life – it's all choice. That said, like Brian, I want to encourage you to put this to the test. I'll give you a few minutes to select a couple WAM partners and determine the time and logistics of your sessions.

Ideally WAM's are best held on Monday. They can be in person or via the phone. Select partners that you are willing to be transparent with.

Take a few minutes now and form your group.

Give them 4-6 minutes to form their WAM groups.

Let me give you the Agenda for your WAM.

WAM AGENDA

INDIVIDUAL REPORT OUT

- 12 Week Year – Actual to Date
- Last week's score
- Focus for this week - Intentionality

* Note: if individual has scored under 85% two consecutive weeks or more, ask "What are they committed to scoring this week and what will they do different this week from last?"

Show WAM slide agenda and discuss.

The WAM consists of an individual report out. Each person will get a few minutes to discuss:

1. Progress against goal – here you will announce where you are at against your goals vs where you should be at this point.
2. Weekly execution – Then you will talk about how you executed last week – your Weekly Score, which you'll better understand in a few minutes.
3. Intentionality – Next, what you will be intentional about this week.

TRAINER'S NOTES

Keep in mind this isn't designed to be a problem solving or strategy session, just a brief check in.

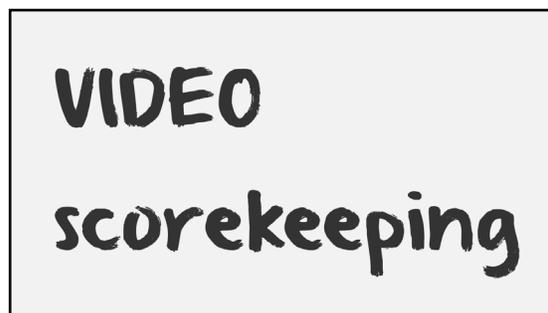
What could get in the way of you consistently participating in a WAM? Where might this break down?

Facilitate discussion – ID potential breakdowns and ways to avoid or overcome them.

Any questions?

SCOREKEEPING

The Weekly Routine – we've covered step 1 & 2, now let's talk about step 3 – which is _____? (Scorekeeping). Here's Brian...



Play video



Show slide of Lead & Lag Indicators

Ok, so what were your take-aways from what Brian talked about?

Discuss the key points.

Key Points of Scorekeeping & Measurement

- *Difficult to know if we're achieving unless measuring*
- *Tendency to shy away from measurement*
- *Measurement is feedback*
- *Important to track a handful of lead and lag indicators*

TRAINER'S NOTES

Turn to the person next to you and make a list of the lead and lag indicators that you might want to track. Don't split hairs on whether it's a lead or lag, just ID the Key Measures that are important to your business.

Give them a few minutes to complete this.

Let's see what you came up with. What are the key measures that you identified?

Write their comments on the flip chart.

Now, select the handful that you feel you need to track over the next 12 weeks.

Give them just a couple of minutes to complete.

Key Measures

- Sales Commission
- Appointments
- Referrals
- Fact Finders
- Meetings
- Dials
- Etc.

SCOREKEEPING & MEASUREMENT

Lead & Lag Indicators

"The most effective lead indicator available to you is your Weekly Execution Score!"

Advance slide to show the most effective lead indicator

THE WEEKLY SCORECARD

You now have a list of lead and lag indicators. In this next video Brian is going to discuss the most powerful lead indicator you have available to you, that you're probably not even aware of. Check it out.

VIDEO
measure of exec.

Play video

TRAINER'S NOTES

| WEEKLY SCORECARD PRODUCER | |
|--------------------------------------------------------------------------|-------------------------------------------------------------|
| CHECK OFF YOUR ACCOMPLISHMENTS IN WEEK 2 | |
| CLOSE \$105,000 IN NEW BUSINESS | |
| <input type="checkbox"/> | Call a minimum of 5 prospects/obj & schedule a min of 3/obj |
| <input type="checkbox"/> | Conduct a minimum of 2 initial appointments per week |
| <input type="checkbox"/> | Follow up with prospects weekly to close |
| <input type="checkbox"/> | Create sales-tracking wall graph & update weekly |
| LOSE 12 LBS. | |
| <input type="checkbox"/> | Limit caloric intake to 1200 or less per day |
| <input type="checkbox"/> | Do 20 minutes of cardio at least 3 times/week |
| <input type="checkbox"/> | Drink at least 8 glasses of water each day |
| <input type="checkbox"/> | Train with weights 3 times/week |
| THE WEEKLY SCORE MEASURES HOW EFFECTIVELY YOU ARE EXECUTING YOUR TACTICS | |

Show slide of the Weekly Scorecard

Ok, what did you learn in that segment?

Discuss the key points.

Key Points of The Weekly Scorecard

- *Most powerful lead indicator you have is a measure of your execution*
- *Weekly Plan contains most important actions – Scorecard measures to what degree you did those actions*
- *It will be uncomfortable at times, you won't always score well*
- *Have the courage to score your execution and you will get better*

The most powerful lead indicator available to you is the Weekly Scorecard.

The Weekly Scorecard measures how well you executed your plan Tactics, and how effective you were with your time each week. Keep in mind, what you are scoring is not your results, but your execution – did you do what you said was most important!

Typically, if you score 85% or higher, on average each week, in most cases you will achieve your 12 Week Goals. It's not about being perfect.

This is the tool you use to guide each day and your week. If this stuff get's done you had a great week. If it doesn't, you lost a week. It really is that simple.

If we use the Thinking – Actions – Results framework, what Thinking could get in the way of us measuring and scoring our weekly execution?

Facilitate discussion – ID potential issue and how to avoid or overcome them.

Anything else that could get in the way of your scoring your execution every week?

Any other questions on the Weekly Scorecard?

TRAINER'S NOTES

CLOSE

That's it, 3 simple steps that will take you approximately 20 minutes. I promise you that if you enter your plan in the system and do these 3 things each week YOU WILL GET BETTER.

What are the 3 steps? _____ (Weekly Plan),
_____ (Peer Support), _____ (Scorekeeping)

THE WEEKLY ROUTINE

- I. Plan your week
- II. Score your week
- III. Engage in peer support

*Show the slide of the
Weekly Routine*

Any questions on the Weekly Routine?

Three steps that are easy to do, and even easier not to do. So make a commitment to incorporate the Weekly Routine. Will it be uncomfortable at times – yes. Will it be challenging at times – yes. That's what it takes to get better. But, that's OK, you're big boys & girls, you can handle it. As you incorporate the Weekly Routine you will find yourself working with greater focus and getting results faster than ever before.

GREATNESS IN THE MOMENT

and Session Close



GREATNESS IN THE MOMENT MODULE

PURPOSE:

- Illustrate the power of the moment
- Help participants understand that results are created in the moment
- Inspire the group to be great by doing what needs to be done
- Learn to leverage the moment
- To close out session strong

EMOTIONAL CONNECTION:

The difference between mediocre and great, on a daily and weekly basis is small. Life is lived in the moment: Greatness happens in the moment. Learning to be great in the moment will virtually guarantee long-term success.

MODULE AGENDA:

I. INTRODUCTION

- a. Post session logistics – next steps
- b. Full day, saved best for last

II. POWER OF THE MOMENT

- a. Introduce GIM
- b. Greatness in the Moment - VIDEO
- c. Group discussion – cover key points

III. SESSION CLOSE

- a. What are you capable of?
- b. Be Great – times you'll struggle that's ok, come back
- c. Congratulate, dismiss

TRAINER'S NOTES

INTRODUCTION & OVERVIEW

Before we get into our last module, let talk about next steps.

Cover the expectations for plan completion, and any planned follow up.

It's been a very full day, and yet I think we've saved the best for last.



Show slide

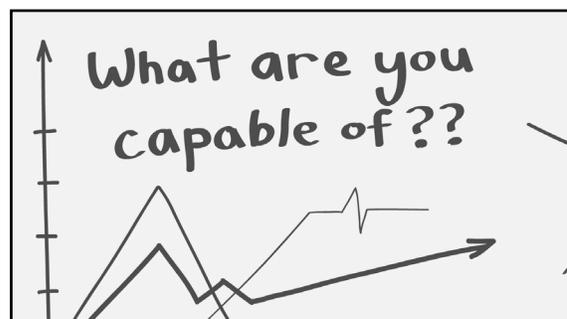
The last concept I want to cover with you today is the principle of Greatness In The Moment.

I'm going to let Brian explain. Take a look.



Play video

Wow, that's powerful!



Show slide

Talk to me about what we just heard?

Discussion the principle of GIM. Be sure to reinforce the key points.

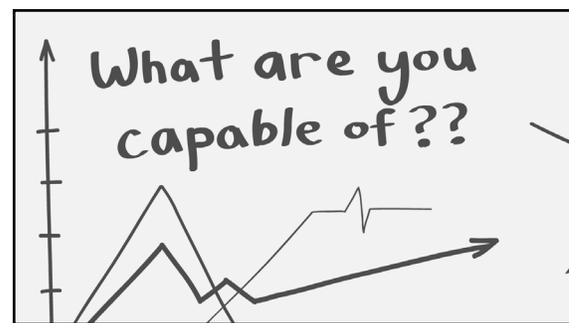
TRAINER'S NOTES

Key Points:

- *Life is lived in the moment, greatness happens in the moment*
- *Results are the confirmation of greatness, not the attainment*
- *Tendency to think we'll be great later, sometime in the future*
- *Difference between great and mediocre is subtle on a daily/weekly basis*

SESSION CLOSE

We began the day by asking the question “What are you Capable of?” The answer might surprise you. I agree with Thomas Edison when he said: “If we all did the things we are capable of doing, we would literally astound ourselves.”



Keep this slide showing; it is the last slide in the presentation

You are capable of more than you know. It's not complicated, but it's not easy either. It takes a willingness to stake a claim and then bring your best every day.

The 12 Week Year provides you with a structured approach to working at your best each and every day, and accomplishing more, faster.

It takes effort to be great. Be willing to put that effort in each day. Challenge yourself to deliver your best. Don't put your future off by choosing activity that is comfortable when you know you need to be engaged in different activity.

Too many people choose comfortable activity over pleasurable results. Be willing to sacrifice your comfort and you will be great.

Teddy Roosevelt said it this way:

“Far better it is to dare mighty things to win glorious triumphs, even though checkered with failure, than to take rank with those poor spirits who neither enjoy much nor suffer much, because they live in the grey twilight that knows not victory, nor defeat.”

Congratulations on completing your training - You are now officially Periodized or a 12 Week Year champion. Now, let's go out there and be great.

Play high energy music – Tom Petty; Running Down A Dream, or something you like.