

FACILITATOR'S GUIDE

ONE 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

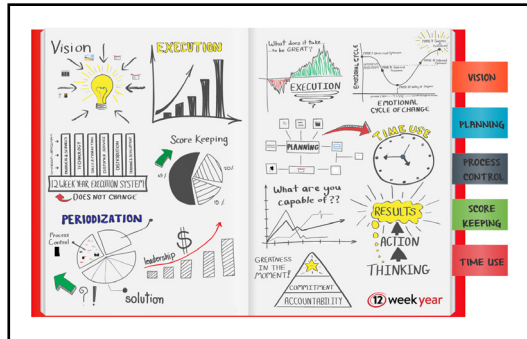
- a. Play VIDEO
- b. Discuss key points from video
- c. Their Expectations of The 12 Week Year

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

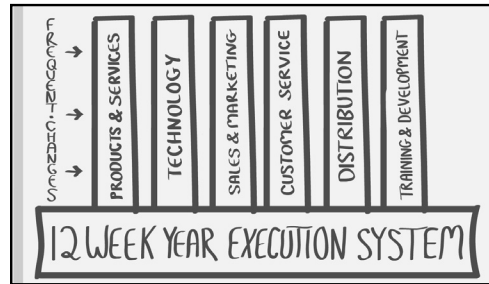
As you learn about the 12 Week Year, I think that it helps to think about the 12 Week Year as being similar to the operating system in your computer. No matter what other software you have, you must have an operating system to make it all function.

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 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.

VISION



VISION MODULE

PURPOSE:

- Create understanding of the power of vision
- Challenge participants thinking about what's possible
- Develop a compelling vision that aligns personal & business

EMOTIONAL CONNECTION:

Vision is the starting point of all high performance. Vision is the emotional connection to everything we do. Creating a clear vision produces a “why” that will help the individual step out and keep moving forward.

MODULE AGENDA:

I. INTRODUCTION

- a. First discipline – first place that we impact results + or -
- b. Play VIDEO
- c. Discuss key points from video

II. VISION EXERCISE – HAVE-DO-BE

- a. Brainstorm Have's, Dyad, 1 person share
- b. Brainstorm Do's, Dyad, 1 person share
- c. Brainstorm Be's, Dyad, 1 person share

III. VISION EXERCISE – PERSONAL JOURNEY

- a. Visualization
- b. Journal

IV. CRAFTING YOUR VISION

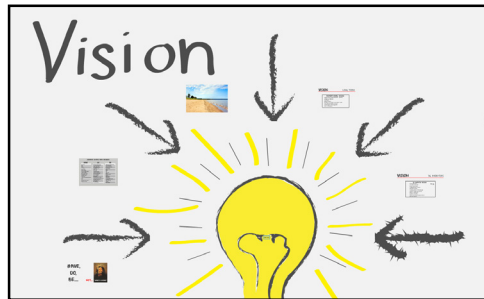
- a. Aspirational Vision
- b. 3-Year Vision

V. CLOSE

- a. Important to dream & challenge
- b. Stay connected – leverage the Vision

TRAINER'S NOTES

INTRODUCTION

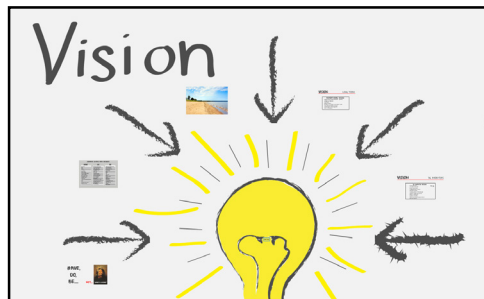


*Advance to
vision slide*

We are about to get started with the real work of our session today. The best place to start is *usually* the beginning, so we will begin with the first discipline of *The 12 Week Year* – vision. Follow along in your workbook as Brian Moran discusses the power of vision in this short video.



Play Video



So what were your key take-aways from Brian's video?

Key Points:

- *Create an understanding of the purpose and power of vision*
- *Challenge participant's thinking about what is possible for them*
- *Participants will develop a compelling vision that aligns personal and business*

As Brian mentioned, vision is the first discipline of *The 12 Week Year*. It is the first place that you either enhance, or limit, your results in life. Your goal is to create a stretch vision that is emotionally compelling for you, one that strikes a balance between your personal, and your business life.

As you work through this exercise, remember that the first challenge that you

TRAINER'S NOTES

will have creating a stretch vision is asking “how?” too soon. Remember to first ask the question “What if?” What would be different if you achieved your vision? The question “how?” is dealt with when you create your 12 week plan.

I think that this quote by Ben Stein sums it up well – *“the Indispensible First Step To Getting The Things You Want Out Of Life Is This: Decide What You Want.”* Well, it’s time to decide....

As you begin to develop your vision, we will go through a couple of exercises designed to help you identify some potential elements to include. They are designed to appeal to different thinking styles.



*Show great
visions slide*

If you think about the accomplishments of human kind since we’ve been on this planet, there are some impressive achievements: Modern Medicine, Space Travel, Electricity - the list goes on and on.

What’s true about all of these accomplishments is that they were preceded by big vision. Great vision always precedes great accomplishments, and it’s true for you as well.

Keep this in mind as you craft your vision.

HAVE - DO - BE

We are going to go through an exercise now that will “prime the pump” for the development of your vision. You are going to look forward into your future from the perspective of today to identify things that are important to you. Have fun with this first exercise – imagining the future should create energy and excitement.

Turn to page ____ in your workbook (Have/Do/Be page). We call this exercise “Have-Do-Be”.

TRAINER'S NOTES

Here's the list of sample "Haves:"

- | | |
|----------------------------|----------------------------------|
| • New house | • 100 acre horse farm |
| • Boat | • Aston Martin DB 9 |
| • Plane | • \$1 million income |
| • Cottage | • 4 day week |
| • Good Health | • 1 week of vacation each Period |
| • Great Family | • Maid |
| • Weekly Massage | • Cook |
| • \$10,000 clothing budget | • Mom and Dad's respect |
| • Condo in Arizona | • Financial security |

As they work, mention the following 2 points:

1. As you find yourself writing things down – be aware of your thinking – if you feel that something you want is impossible – write it down and underline it.
2. Also, be sure that you are not just writing down what you think others would approve of. This list is your list – it needs to be emotionally compelling to you. Not to someone else.

Wait about 4-5 minutes - when about 2/3rds are done writing.

Take another 30 seconds or so and finish up.

If I can get everyone to stop – thank you. Now we are going to share what we've written. Why would we ask you to share? *It increases your commitment to make it happen when you share your vision with someone else, and you have to think more deeply about your vision when you share it.*

DYAD - OK, turn to the person next to you and share what's on your list, real quickly, just to prompt thought. By the way if you hear something you like "steal it."

Give them a few minutes so that both can share their lists. Wait until the energy has started to die down a little.

Ok, let me get your attention back. Who has a good "Have" list that would be willing to share it with the group? If there are some things that are private and too personal to share then don't share those, just the stuff you are comfortable sharing.

Wait until someone volunteers - and thank them after they read their list.

TRAINER'S NOTES

Thank you, as you read that list, are you emotionally connected to making those things happen. Would it feel great to reach those goals?

If you look down your list and you get an emotional – gut level response, then the list is working for you. If not, it just means that you need to stretch a little more.

DO'S

Ok, now I want you to complete the Do column. I'll give you a few minutes to write down all the things that you would like to DO in the time that's left to you on earth.

As the group works individually, about 2-3 minutes in read the sample Dos.

HAVE	DO	BE
New house	Buy Mom and Dad a house	
Boat	Go to the Kentucky Derby	
Plane	Attend a Super Bowl	
Cottage	Go to Masters/US Open	
Good health	Take family to castle	
Largest family	Learn to fly	
Weekly Massage	Write a book	
\$10,000 clothing budget	Act in a play	
Condo in Arizona	Create family wealth	
100 acre horse farm	Go on a ski trip out west	
Ryder Martin D6 9	Play with Jimmy Buffet	
\$1 million income	Start a foundation	
4 day week	Work in a winery	
1 week of vacation each period	Be in a movie	
Maid	Dive the Great Barrier Reef	
Cook	RV with family to the Grand Canyon	
Mom and Dad's respect	Play Augusta, join Augusta	
Financial security	Go on a mission trip	
	Box a kangaroo	
	Run with the bulls	

Read Do's list.

Here's the list of sample Do's:

- Buy Mom and Dad a house
- Go to the Kentucky Derby
- Attend a Super Bowl
- Go to Masters/US Open
- Take family to castle
- Learn to fly
- Write a book
- Act in a play
- Create family wealth
- Go on a ski trip out west
- Play with Jimmy Buffet
- Start a foundation
- Work in a Winery
- Be in a movie
- Dive the Great Barrier Reef
- RV with family to the Grand Canyon
- Play Augusta, join Augusta
- Go on a mission trip
- Box a kangaroo
- Run with the bulls

Remember, this list is what excites you – not what you think others would approve of. If you find yourself saying “that’s impossible” write it down and underline it.

I will give you another minute or so to complete your lists.

Take a few moments and finish up that last thought.

TRAINER'S NOTES

DYAD - Okay, turn to the person next to you and share what is on your lists. Make sure that both of you get a chance to share.

Give them a few minutes so that both can share their lists. Wait until the energy has started to die down a little.

Alright, let me get your attention back please. Who would like to share their “DO” list?

Thanks for sharing that – good stuff!

BE'S

Ok! We've worked through Have and Do, now I would like you to complete the “Be” list. Take a few minutes and write down all of the things that you would like to be in the time that's left you on earth.

As the group works individually, about 2-3 minutes in read the sample Be's.

DREAMS HOPES AND DESIRES		
HAVE	DO	BE
New house	Buy home and had a house	I want to be a servant leader
Boat	Go to the Kentucky Derby	A Godly man/woman
Marriage	Attend a Super Bowl	A great husband/wife
College	Go to Mother's Day	A loving Father/Mother
Good Health	Take family to cattle	An encourager
Great Family	Learn to fly	A servant leader
Weekly Mountain	Write a book	Speaker
\$10,000 a month budget	Act in a play	Pilot
Comed in Arizona	Create family wealth	Loyal friend
80 acre horse farm	Go on a 10 day trip west	Mayor
John Martin OS S	Play with Jimmy Buffet	Community Leader
\$1 million income	Start a foundation	Author
5 day week	Work in a winery	Scratch Golfer
1 week of vacation each period	Go on a safari	Philanthropist
Married	Own the Great Barrier Reef	#1 in the company/system
Goal	Go with family to the Grand Canyon	Trustworthy
Mom and Dad's request	Play Nintendo, join Nintendo	Mayor of my town
Financial security	Go on a million trip	Passionate
	Run a business	More confident
	Run with the bulls	

Read slide of sample Be's

Here's the list of sample Be's:

- I want to be a servant leader
- A Godly man/woman
- A great husband/wife
- A loving Father/Mother
- An encourager
- A business leader
- Author
- Speaker
- Pilot
- Loyal friend
- Mentor
- Community Leader
- Wealthy
- Scratch Golfer
- Philanthropist
- Multi Millionaire
- #1 in the company/system
- Trustworthy
- Mayor of my town
- Passionate
- More confident

Take a few moments and finish up that last thought.

Okay, turn to the person next to you and share what is on your list. Make sure that both of you get a chance to share.

TRAINER'S NOTES

Give them a few minutes so that both can share their lists. Wait until the energy has started to die down a little.

Ok, bring that to a close. Who would like to share their “BE” list?

That’s great, thank you.

PERSONAL JOURNEY



Show lakeshore slide

Now we are going to change the pace up a little and make it a bit more reflective and thoughtful. This exercise is a second way to develop elements for your vision. It sets you up to look backwards on your life from a time when your journey is nearly over. By doing this, we will try to get some further insights into what you want to create in your life.

Let me ask; at what times and places can we be most reflective - where do we tend to have our best insights? (Get sharing – in the car, in the shower etc...) What is common across most of those examples? (Quiet, no interruptions)

Given that we can’t bring showers, cars, or beds into the room, we are going to do the next best thing.

Have you ever seen a college basketball player near the end of an important and close game get ready to take a free throw, what do they often do? *Take responses – get to “take a deep breath.”*

Why do you think they take a deep breath? *Get sharing – get to the answer “it relaxes them.”*

We are going to use a technique now that was originally developed by a medical Doctor from Harvard that has been found clinically to lower heart rates and stress levels.

First take a deep breath and let it out slowly. (Demonstrate) Can you feel the tension begin to leave your body? When you are ready, take another deep breath and slowly exhale. Feel yourself slow down and relax.

TRAINER'S NOTES

Continue to breathe deeply, and I want you to focus on your breathing.

I'm going to ask you to close your eyes, or if you are not comfortable with that, please just look down at the floor.

Play quiet reflective music – such as Enya's Watermark

As you continue to breathe, I want you to visualize the number 10. With each breath, I would like you to count backwards one number, counting down from the number 10. Continue counting backwards, until you reach the number 1. When you reach that number, repeat it until you hear the sound of my voice.

Count backwards silently until you have reached the number 3 or so, and then continue with the script below.

Wherever you are in your counting, please stop and listen to the sound of my voice.

VISUALIZATION - *Read Slowly*

We are going on a short journey together. See yourself in a comfortable chair on the front porch of a cottage on the shore of a beautiful lake. It is a warm summer evening, with the red sky reflecting on the water. In the distance you can hear birds singing and the laughter of children. You notice that there is a gentle breeze coming off the lake.

You are in the twilight of your life – you are 90 years old. In a reflective mood, you decide to look back over your life's journey. *Read each question first silently, and then out-loud so that your pace is slowed.*

Career - Fade out on the porch and bring to mind your career.

- Bring to mind the different jobs you held over your long career. Were you remarkable in the execution of those roles? (Pause) Or did your efforts allow you to “just get by?” (Pause)
- Do you look back on your career satisfied? (Pause) Or do you have a pang of regret for opportunities under-delivered?
- Did you do what you really wanted to do in your career? (Pause) Or did you go with the flow, never tapping into your passions?
- Were you excited to get up each morning? (Pause) Or did you hit the snooze button, wishing that the day was not starting?
- Were you excited about doing the job that you chose to do? (Pause) Or did you go through the motions, passively moving through the day?
- Bring to mind the people that you worked with. (Pause) How did you impact their lives?

TRAINER'S NOTES

- How did you help them? (Pause) How did they help you?
- Did you achieve everything that you thought you could? (Pause) Or did you leave the best undelivered?
- Did you create the results that you were capable of creating? (Pause) Or did just good enough define your work?
- Did you give your best? (Pause) Or did you number yourself with the mediocre?

Spouse/Partner - Fade out on that scene, and fade in on your spouse or partner.

- What was that relationship like?
- Was your relationship close? (Pause) Was it intimate? (Pause) Was it loving?
- Was it everything that you hoped it would be? (Pause) Or was it less than it could have been?
- Did you invest emotionally in your spouse/partner, did you build them up – or were you too busy criticizing?
- Did you bring them to splendor, were you a jewel in their crown? (Pause) Or did you seek your own fulfillment and desires?
- Did you give your best? (Pause) Or did you go through the motions?
- Did you give your best to your mate?

Family - Fade on that scene, and bring to mind your family.

- As you look back how were you as a son, a daughter, a brother, a sister?
- Often times families hurt one another, if that happened to you did you forgive?
- Bring to mind your children (or nieces and nephews), see their faces, what were those relationships like?
- Were you there for them as they were growing up?
- Did you know their dreams, their fears?
- Did you know their hearts?
- Did you treat them as gifts or as inconveniences?
- Did you make time for them – or were you too busy with work and recreation?
- Did you build their confidence and esteem – or did you constantly criticize?
- Did you laugh and play – or were you always serious?
- What did you sow into your kids?
- What was your influence?

Spiritual - Fade on your children, and think about where you are at spiritually

- Do you believe in a creator, did you live in alignment with your beliefs?
- As you look back did you bring your spiritual beliefs into all areas, in difficult times and in good times – or was that just something for Sunday morning?

TRAINER'S NOTES

- Did you tap into that supernatural power – or did you rely on your own power?
- As you sit in that rocking chair realizing that you're nearing the end of your life, what does eternity hold for you?

Legacy – One last time let that scene fade and think about your legacy

- What impact did you have in the world?
- In your community?
- Among your friends and family?
- Is the world a better place for you having been in it?
- What difference did you make?

What was the theme of your lifetime?

Did you live your passion? Did you live your vision? Did you live life your own way?

The great news is that you are not 90. You still have time to create the life that you really want. You can do anything you want, you can be anything that you want to be.

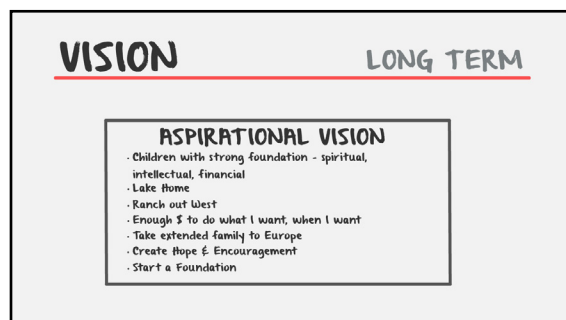
Bring your attention back to the room at your own pace. *Give them a few moments.*

Take a few minutes and record any insights in the space provided in the workbook for personal journey. *Give them a few minutes to do this – play some quiet music.*

CRAFTING YOUR VISION

ASPIRATIONAL VISION

Based upon the work we have done so far, it's time to develop your long term Aspirational Vision. This vision may be 5, 10, 20, or more years into the future. What is important is that it represents a life well lived to you. It may include aspects of both your business and personal life – what is important is that it is meaningful and emotionally compelling to you.



Show the Aspirational Vision slide and read

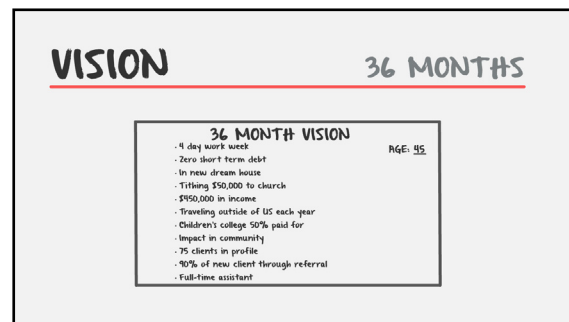
TRAINER'S NOTES

On page ____ of your workbook is a place to capture your Aspirational Vision. Take five minutes and complete that vision now.

As with all exercises, monitor the energy level of the group and be sure not to cut them off too soon.

36 MONTH VISION

Now we are going to set a stake in the ground for your personal and business vision three years, (36 months), out. On page (____) of your workbook is a place to develop your vision three years from today. To begin, write your age three years from today in the space provided. Why would we ask you to do that? (Because time is passing).



*Show the 36
Month Vision Slide
and read aloud*

So, based upon some of the work you did in the earlier exercises, your Aspirational vision, and prompted by the areas to consider work on your own and define your vision three years from today. What does greatness look like for you?

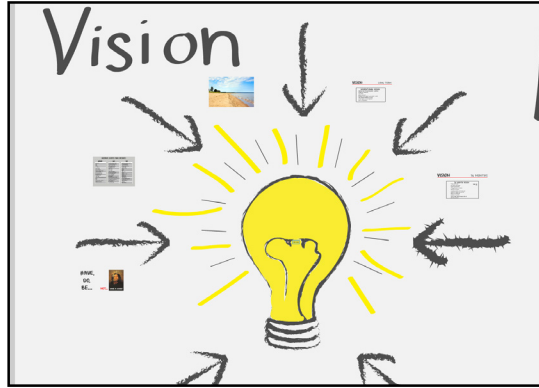
Wait until most have stopped writing

Let me have your attention back at the front of the room. Thank you. Please turn to the person next to you and share what's in your vision three years from today. If there are some things that are private and too personal to share then don't share those, just the stuff you are comfortable sharing.

Wait 3-4 minutes

Finish that up please. As you review your vision, are there elements that excite you? Are there goals that represent greatness for you? If so, you probably have a vision that will work for you.

TRAINER'S NOTES

*Advance slide***CLOSE**

At this point you should have personal and business visions – both of them compelling, inspiring and powerfully aligned.

The truth is an hour or so is not enough time to create your vision. In fact, vision is one of those things that you want to keep coming back to. Don't put this on the shelf. Instead stay connected with it. Continue to dream about your future. Challenge yourself to a future that is bigger than the present: A future that is truly worth living.

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

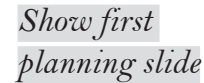
III. DEVELOPING TACTICS

- 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

INTRODUCTION



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

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

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.



Show slide

Page 2. Facilitator's Guide | Planning

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
<div style="border: 1px solid black; padding: 5px;"> <p>FOR THE PERIOD ENDING _____ I HAVE/HAM ...</p> <p>→ Submit \$45,000 in FYC</p> <p>→ Add \$900K in assets under mgt</p> <p>→ 12 WEEK GOALS</p> <p>→</p> </div>	

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

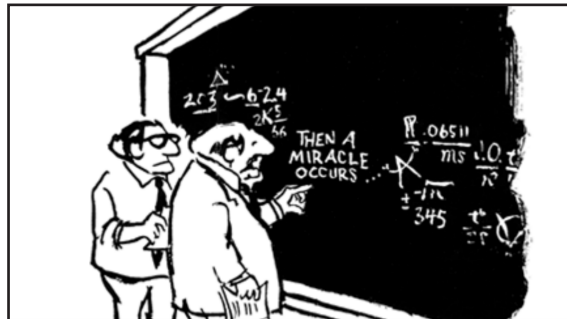
Does anyone need more time?

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?

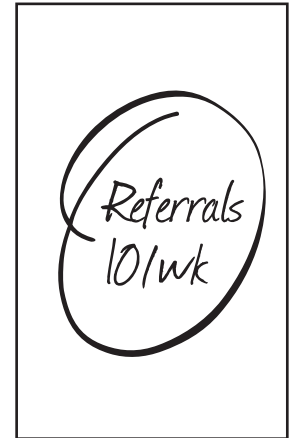
If not you will be in just a moment. Mind Mapping is a method that allows you to creatively brainstorm all the possible actions that you could take. The great thing about Mind Mapping is that it isn't linear. We are going to use it to develop the tactics for your goals. In this way, you tend to get more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

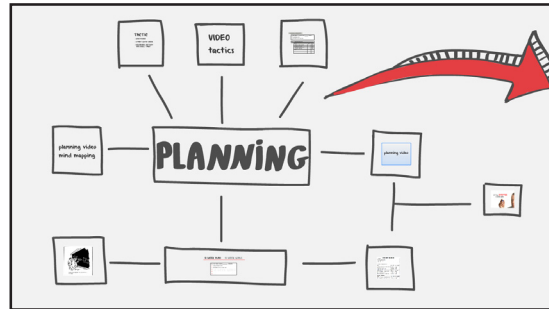
How was that? Did you create a good list?

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.

**planning video
mind mapping**

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.

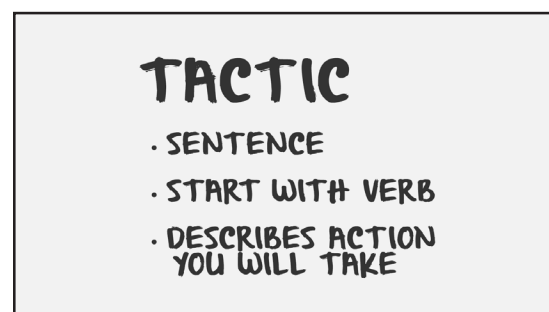
Then stop and decide if that is enough to accomplish your goal. Remember less is more. If you can get it done with 2, you don't need 3. If it takes 5 or 6 than that's fine. Keep it focused.

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

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

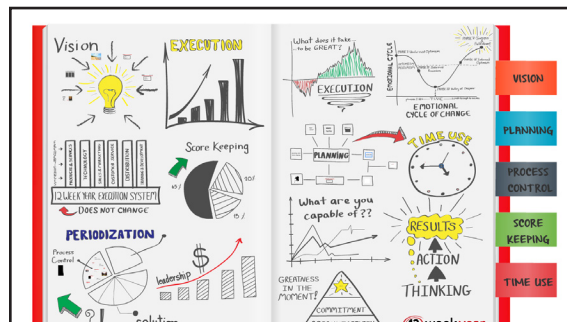
Let's take a couple of examples and critique them as we did with the goals.

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!

PERFORMANCE TIME



PERFORMANCE TIME MODULE

PURPOSE:

- Learn to be more intentional with their time
- Learn how time-blocking works to get more of the critical activity done
- Challenge group to use their time more effectively

EMOTIONAL CONNECTION:

Take back control of your day and your life. Reduce your stress. Free yourself from all the stuff that gets in the way and slows you down. Get more of the important things done every week.

MODULE AGENDA:

I. INTRODUCTION

- a. Introduce time use

II. BLUE CHIP EXERCISE

- a. Create 2 groups – Name & Champion
- b. Create energy – applause meter
- c. Directions
- d. Run exercise
- e. Score the exercise
- f. Debrief – key points

III. WHITE CHIP/BLUE CHIP

- a. Brainstorm and Flp Cht White Chips
- b. Brainstorm and Flp Cht Blue Chips
- c. Select 2-3 White Chips to stop or delegate, & 2-3 Blue Chips to start
- d. Share with partner

IV. TIME BLOCKING

- a. Show VIDEO – discuss key points
- b. Group Discussion
 - i. Strategic Block
 - ii. Buffer Block
 - iii. Break-out Block

V. MODEL WEEK

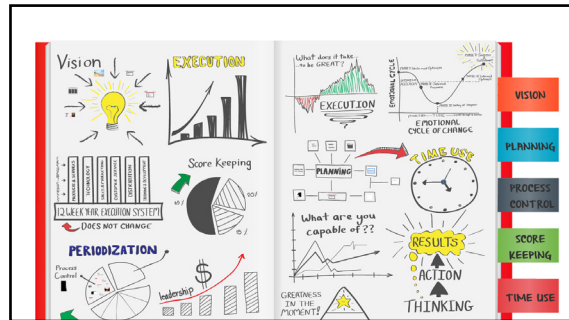
- a. Intro concept & suggest completing on own

VI. SUMMARY

- a. Easy concept to understand, challenging to apply
- b. Come face-to-face with Pain of Change
- c. Apply concepts don't get hung up on mechanics

TRAINER'S NOTES

INTRODUCTION



Advance slide to presentation map

Prepare a table for the Blue Chip exercise in advance. The set-up is two rows of chips with approximately 26-30 White Chips, 12-15 Red Chips and 6-8 Blue Chips in a 2-1-2 pattern. Once the table is set, cover it with a dark tablecloth thick enough to hide the chips, and keep the table off to the side of the room where no one will bother it.

We are now going to explore the fifth Discipline of The 12 Week Year – Time Use.

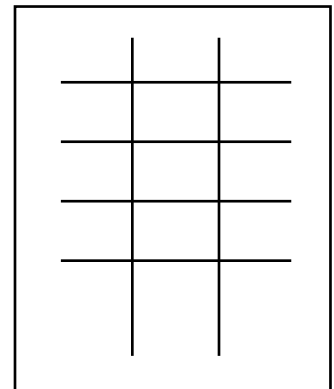
BLUE CHIP EXERCISE

I'd like to get started with a little contest to illustrate a principle about getting results. In order to do that, I'll need all of you to stand up and divide into two groups – so do that now please.

Ask someone from the group to help you position the table in the room so that there is room enough around it for the game to be played. Separate the teams & position them in the room so there is enough space to conduct the exercise. As they are doing this, prepare a Flip Chart with columns as shown below.

Ok, each team will need to come up with a “team name” and a champion. I'll give you two minutes to create a team name and select a champion who will represent the team. If any of you have played this game before, please don't be one of the champions and don't talk about the game to your team.

Give them 2 minutes to do this, and then ask them for the Team Name, and who has been selected as champion.



Alright, your time is up. What is the name of the first team & who is your champion? And the next team, what is your name & who is your champion? *Record the team names and the champions at the top of the middle and right columns.*

TRAINER'S NOTES

Have the champions step forward. If they have not already done so, have the teams gather around the table - one team on one side and one team on the other.

Before we get started, I'd like to check out the support for our two champions. Let's start with _____ (the team name); can I hear the team's applause for _____ (their champion)?

Encourage the team to cheer and applaud. Then do the same for the other team.

How about _____ (team name), can I hear some applause for _____ (champion)?

That wasn't bad but I think you can do better; can I hear the first team cheer for their champion again? Wow! OK let's hear the second team again!

It seems about even, so we're going to have a run-off. If I can have our champions step forward and face me.

Position the champions standing and facing you, side by side, with their backs to the table. Instruct them not to turn around until you say go. Remove the tablecloth without moving the rows of chips. Also instruct the teams to cheer and support but no coaching.

This exercise is about getting results, but as in all games, there are rules to follow:

First, champions do not turn around or look behind you until I tell you to begin.

Second, teams, you may support your champion by clapping and cheering, but no direction or coaching.

In just a moment I'm going to ask the two of you to turn around and get results - but don't turn around until I tell you to do so.

Give the following instructions rapidly, creating excitement and leaving no time for the champions to ask any questions. Once you say go, start cheering and clapping.

Results in this game, are represented by disks on the table behind you. There is a row behind you _____ (name) and you _____ (name).

There are some rules on how you can pick up the disks:

You may pick them up with one hand and place them into the other - let's see your technique - very good!

TRAINER'S NOTES

You cannot sweep or scoop the disks – NO SWEEPING OR SCOOPING!

Work only in your row.

I'll give you 15 seconds to get as many results as you can. Remember teams only cheer your champion on - no instructions or pointing. Ready? Go!

The 15 seconds need not be exact. Allow enough time for them to pick up the White and maybe 1 or 2 Red.

“STOP.”

Because of the excitement and noise you will probably need to yell “Stop” and even reach out onto the table to get their attention. Once they have quieted down, and you have their attention proceed.

Ok, great job! Let's see how your champions have done. Champions count up your White chips!

_____ (champion 1's name) how many White chips did you pick up?

Ten? Good. Incidentally, the white chips are worth \$1 each.

Write \$1 next to “White”, then write in the actual amount of chips picked up x \$1 in the white chip row under the team's name.

So _____ that's \$X. Let's hear it for your champion Team _____ (team name).

How about _____, (champion for the second team), how many white chips did you pick up? X, that's great. \$X for Team _____ (team name).

How about the Red? By the way, the Red is worth \$100 each.

Write \$100 next to Red, and then write in the actual amount in the row under the team's column. Do this for both champions.

Team 1 your champion (name) got \$X so let's hear it for your champion (name)! Team 2 your champion got \$X let's hear it for your champion.

And finally, how about Blue? (Zero)?

That's too bad because the Blue chips are worth \$1,000 each.

	Team_	Team_
White \$1	\$10	\$14

TRAINER'S NOTES

Write \$1,000 next to Blue, and then write in the actual amount in the row under the team's column. And total the scores.

OK team _____ won! Let's hear it for both champions!

How is the way _____ & _____ (champions) approached the game a mirror of the way we often approach our jobs?

Answer: We just jump in and get started on whatever is in front of us.

Right. Often we just start working on stuff without much thought to what is most important.

Someone might bring up the fact that you didn't tell them the value of the chips so they didn't have all the information they needed to be effective. Your response is: That's true, and does that ever happen in the workplace? Do you always have all the information from your boss, the client, the marketplace?

If the champions had taken 4 to 5 seconds of the 15 to look at the table, what clues existed that might have changed the way they performed?

There are 3 points you want to discuss in no particular order:

- 1. More whites, less blues – typically less means higher value*
- 2. Blues further away – more valuable*
- 3. Color – poker, stock market, blue ribbon*

Let me ask you another question: Did the champions work hard? (Yes).

Did they get maximum results? (No).

So what's the relationship between hard work & results?

Hard work does not guarantee results – hard work on the right things produces the maximum results.

The fact is different chips had different values – different tasks have different values.

Another question: Given the time allotted could they have picked up all the chips, was it possible to pick up all the chips? (No).

This is a critical point.

Remember that it's our thinking, our frame of reference, which drives our actions and creates our results.

TRAINER'S NOTES

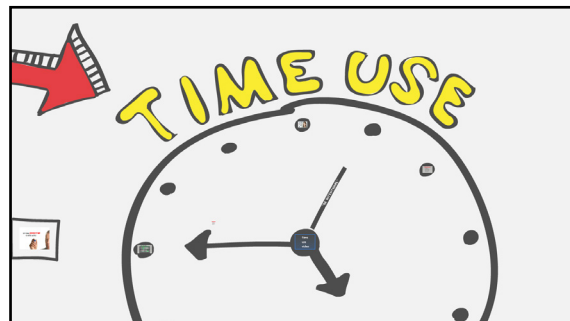
If you are operating under the thinking that you can “get it all done” then you will struggle.

A recent study found that the average manager has 40 hours of work on their desk at the end of each day. If that's true for you, the thinking shift that needs to happen in order for you to be more effective is the realization that “you can't get it all done.”

If you could, then it really wouldn't matter where you started - you'd have time to pick them all up. Once you realize that you can't get it all done, you are forced to prioritize and to be more intentional about the activities that you engage in.

Are there any other observations or insights from the exercise?

Ok, let's give our champions one more round of applause, and find our seats to look at how we can apply the insights from the exercise to be more effective.



*Advance slide
to time use*

WHITE CHIP / BLUE CHIP

Turn to page ____ in your workbook. There are two charts at the top of the page, write WHITE CHIPS on the header on the left. Turn to the person next to you, (or at your table) and brainstorm all the white chips in your world.

Write WHITE CHIPS on a Flip Chart on the left side of the room (to the left of the screen).

Ok, what did you come up with?

List their responses on the flip chart

After all responses, say: there are 3 things you can do with white chips:

TRAINER'S NOTES

Write on a flip chart:

1. Stop doing them – there are often many things you can just stop doing
2. Delegate – other things you can delegate – to a person or to a “system”
3. Increase Efficiency – some of the white chips you’ll still need to do yourself, in those cases, the goal is to improve your efficiency – we’ll show you how to do that in a few minutes

White Chips

Now, let’s look at the other side, take two minutes and brainstorm all the Blue Chip high-value activities for you. Under the header Blue Chips write down with your partner the blue chips in your world.

Give them a few minutes to do this. While they are working, on the chart on the right side of the room, write BLUE CHIPS at the top. If you have just one flip chart, tear off the WHITE CHIPS list and tape it to the wall.

Ok, let’s see how you did with the Blue Chip list.

List their responses on the Blue Chip flip chart.

What I would like you to do now is identify 2-3 white chip activities that you would be willing to stop doing, do less of, or delegate. What we want to do is open up a window of time that we can then fill with blue chip activity.

Blue Chips

Now, let’s identify 1-3 blue chips activities that if you spent more time on would have a positive impact on your performance.

Turn to the person next to you and share the items you highlighted and the impact you believe it will have.

Alright, let’s take a look at how we can structure our time to align with the lessons of this exercise carving out time for blue chips and effectively dealing with the white chips.

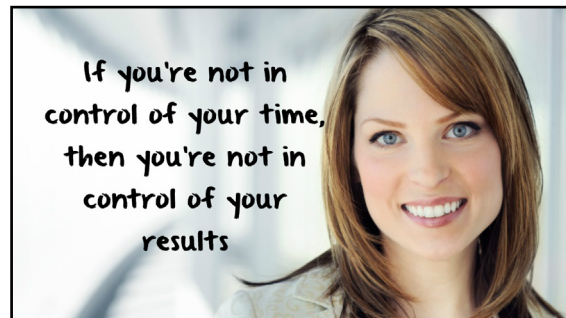
TIME BLOCKING - VIDEO

Let’s take a few minutes to hear what Brian has to say about intentional time use in this video:

TRAINER'S NOTES



Play video



Advance slide and read

What did you take away from what Brian had to say?

If they don't touch on the Key Points, bring them up in the discussion

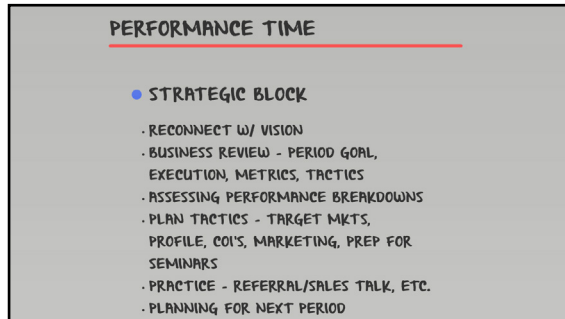
Key Points:

- *Everything happens in the context of time - If you're not in control of your time you're not in control of your results*
- *Performance Time - system to carve out time in your week to get things done*
- *Time blocking - Strategic Block, Buffer Block, Breakout Blocks*
- *Mechanics are easy - thinking about how to allocate your time gets in the way*

Turn to page ____ in your workbook. Brian mentioned time blocking in his video, and I want to share the details of that system with you now. Time blocking is a system that allows you to structure your day in a way that can help you to be profoundly more effective. The system is called Performance Time, and it helps you to take back control of your day. There are three primary time blocks in the system: Strategic Blocks, Buffer Blocks, and Break-out Blocks.

A Strategic Block is a 3-hour block of uninterrupted time that is scheduled in advance. During these blocks you accept no phone calls, no faxes, no e-mails, no visitors - no nothing.

TRAINER'S NOTES



Show the Strategic Block Slide and read the script below for Strategic Blocks

Instead you focus on the strategic and money-making activities - your Blue Chips. Doing so concentrates your intellect and creativity and produces breakthrough results. You will likely be astounded by the quantity and quality of the work you produce.

Here are some of the things you do in a Strategic Block:

- Reconnect with your vision
- Conduct a review of your business – What progress are you making on your 12 week goal, how well are you executing, what progress are you making with your metrics, which tactics are paying off, which tactics are you struggling with
- Assess performance breakdowns – what are the causes, and what can be done about them
- Executing plan tactics that are strategic in nature (for example you might work on defining an ideal client profile, writing a marketing piece, reading an important book, or practicing a script)
- Practice – referral/sales talk
- Building a new plan for your next 12 weeks

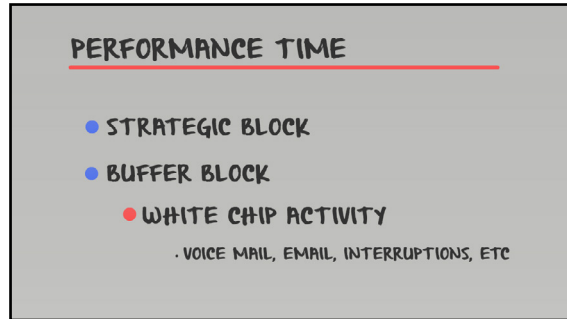
In general these are your strategic activities, not your day-to-day stuff.

One of the questions that is often asked is “Do you make outbound prospecting calls in a Strategic Block?”

If you get this question a good response is: Typically not. Even though this might be a Blue-Chip activity for you, you would instead block out calling time separately from your Strategic Block. The exception might be that if the most strategic thing I can do this week is schedule some meetings with prospects, then I might take 60-90 minutes of my Strategic Block and make calls. If this is a regular occurrence, then you’re missing the concept.

The next time block is the Buffer Block

TRAINER'S NOTES



*Show the Buffer
Block Slide*

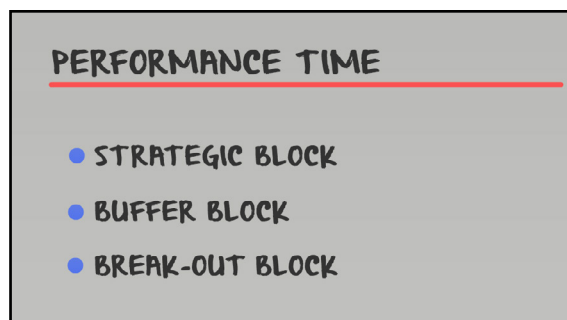
Buffer Blocks are created to deal with all the unplanned items that arise throughout the day. Nothing is more unproductive and frustrating than having to deal with constant interruptions throughout the day. We've all had days where unplanned issues dominated our entire day.

A Buffer Block is a block of time set aside in advance to handle the unexpected. For some, 30 minutes once a day is sufficient. For others, two separate one-hour blocks may be necessary. By grouping together activities that tend to be unproductive, you can reduce the inefficiency and take back control of your day.

So an example is that if I call your office and you're not expecting my call your assistant or voice mail would say that you return calls between 11-12 and 4-5 what time works for me? Or if I stick my head in your office and ask for a couple of minutes, your response is – Sure I'm available between 11-12 or 4-5 what time works?

Does this work with 100% of the interruptions? No, but if you apply the concept you can use it with 60-70% which frees up an enormous amount of your day.

One of the key factors contributing to performance plateaus is the absence of free time. Too often entrepreneurs and professionals get caught up in working longer and harder. This approach is an energy and enthusiasm killer. To achieve greater results what's necessary is not more hours, on the contrary, it is more free time.



*Show the last block -
a Breakout Block*

A Break-out Block is a minimum 3 hour block of scheduled time that is devoid of any work related activities and thoughts. It is time scheduled away from the business during normal business hours. This time is designed to refresh and

TRAINER'S NOTES

reinvigorate so that when you return to work you can effectively focus.

Most people take to this block pretty well. However, if you have Break-out Blocks without utilizing Strategic Blocks & Buffer Blocks your performance will suffer. You earn the Breakout Blocks with good Strategic Blocks & Buffer Blocks.

Getting started, we recommend that you have 1 Strategic Block each week, 1-2 Buffer Blocks each day, and maybe 1 Breakout Block a month.

The Time Blocking concept can be used for more than just Strategic or Buffer Blocks. The more you can structure your days and weeks the more effective your execution will be. Schedule routine tasks on the same day, at the same time each week, if possible. Also consider when you tend to be at your best. Are you a “morning” person or are you better in the afternoon or evening? Schedule the important activities during this time: Strategic and money making activities like your Strategic Block and coaching sessions.

MODEL WORK WEEK							
	SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
7:00 AM				BUFFER BLOCK			
8:00 AM		WEEKLY PLAN & LOG					
9:00 AM		WARM	STRATEGIC BLOCK	APPOINTMENT	PROSPECTING	ADMIN	
10:00 AM				APPOINTMENT			
10:30 AM		PROSPECTING		PROSPECTING			
11:00 AM							
11:30 AM		BUFFER BLOCK			BUFFER BLOCK		
12:00 PM		REFERRAL					
1:00 PM		APPOINTMENT	APPOINTMENT	REFERRAL	APPOINTMENT		
2:00 PM				LUNCH			
3:00 PM		APPOINTMENT	APPOINTMENT	APPOINTMENT	APPOINTMENT	BREAK-OUT BLOCK	
4:00 PM						2nd & 3rd WKS	
5:00 PM				BUFFER BLOCK			

Advance to Model Week slide and advance to show the addition of the time blocks. Mention the time blocks as they come up

MODEL WEEK

In your workbook is a blank weekly calendar for you to create a “Model Week.” After the session, take a few minutes and block out your time blocks for what would be an ideal week. Be sure to include all of your important activities that can be scheduled, and leave enough white space to accommodate the unexpected.

Any questions about the time blocks or the Model Week?

Answer any questions they have regarding the three time blocks.

In the Performance Time video we saw earlier, Brian asked us to discuss how our thinking might get in the way of changing how we spend our time and applying the concept of time blocking.

Take a few minutes with the person sitting next to you and discuss the thinking that might get in your way of implementing the time blocking concepts.

Wait until they begin to quiet down, and get their attention back

TRAINER'S NOTES

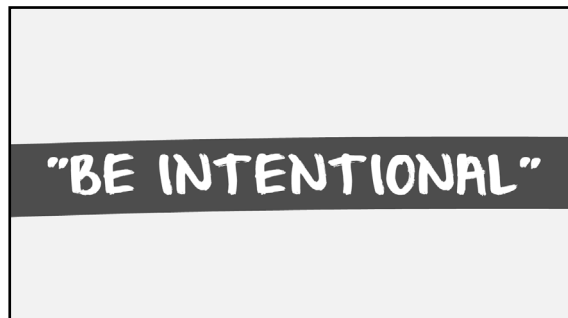
What are some of the thinking barriers that might get in your way?

Capture their responses on the flip chart. Examples might be "I can't do a Strategic Block because I have an open door policy." Or "When the phone rings it might be important so I always answer it," Or "I am ADD I can't focus on anything for 3-hours at a time." Or, "I have way too many interruptions in my day to time block effectively." After you have a good list, ask them how they might overcome these thinking barriers.

SUMMARY

Time use is one of the areas where we come face-to-face with the discomfort of change. Everybody says they want to use their time more effectively. In order to do so you must be willing to change how you structure your time.

As Brian said, the challenge with time is not the mechanics it's our thinking. Don't get hung up on the mechanics, and miss the concept. Block out time for strategic activity and take control of the interruptions.



Show slide

In the end everything happens in the context of time. If you are not in control of your time then you are not in control of your results. Ultimately, personal effectiveness is about INTENTIONALITY.

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

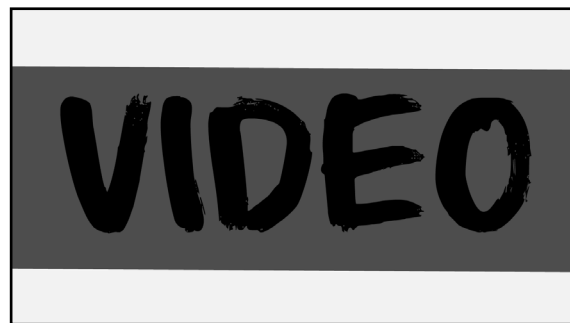
INTRODUCTION & OVERVIEW



*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. Capture your thoughts on page 17 of your workbook.



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"*

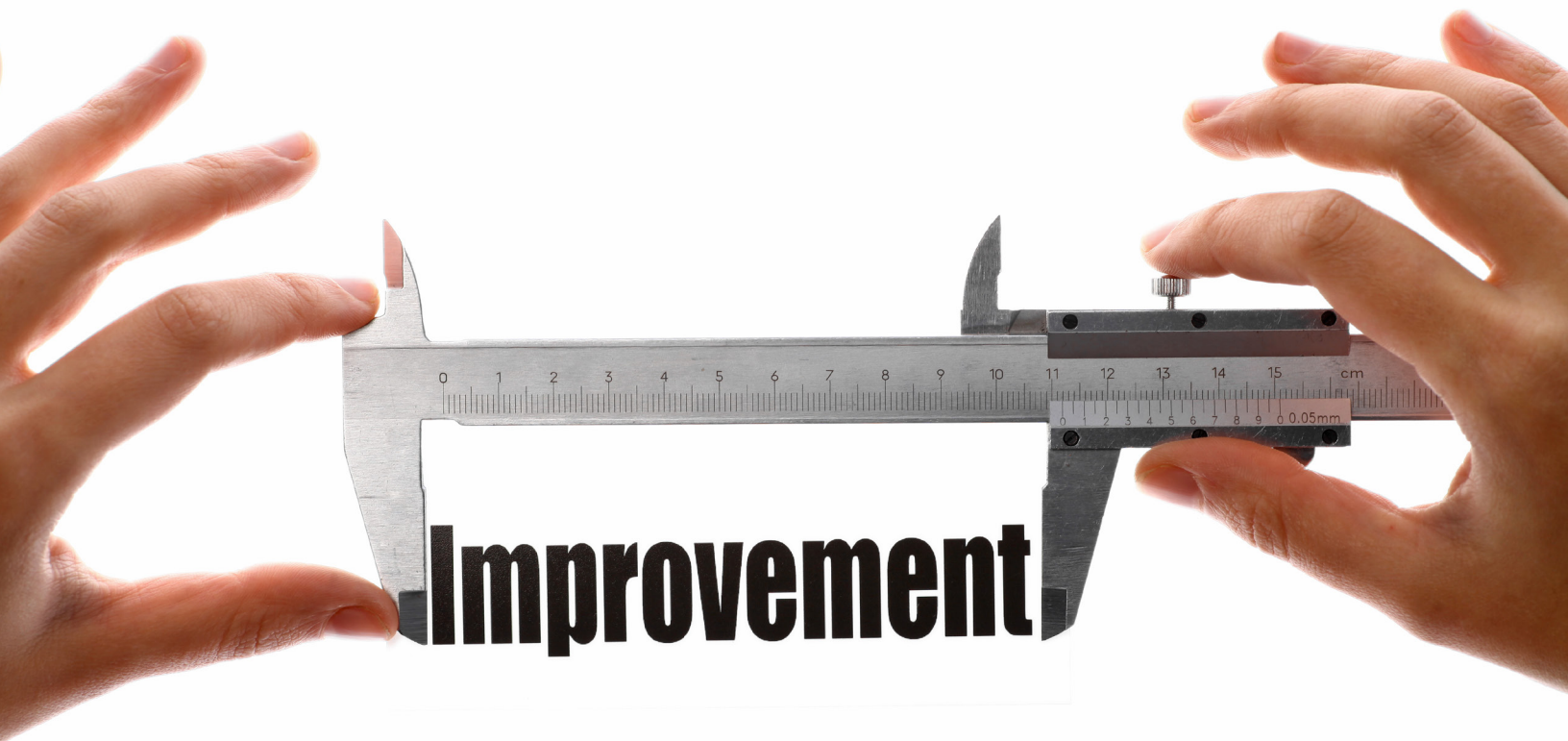
TRAINER'S NOTES

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

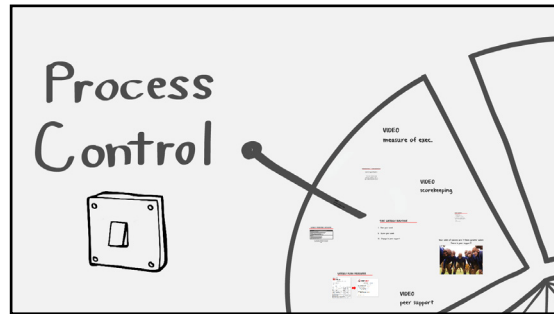
- a. Maslow & Herzberg – VIDEO, discuss key points
- b. Lead & Lag indicators – Flip chart, participants select
- c. The Weekly Scorecard – VIDEO, discuss key points
- d. Weekly Scorecard – discuss how to use
- e. Breakdowns discussion

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.

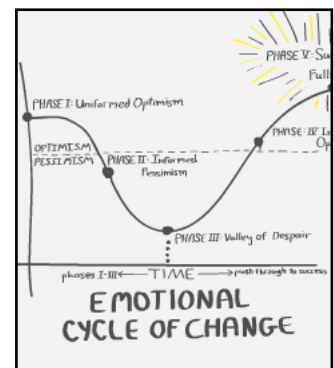
Draw ECOC graph on flip chart as you talk through each phase

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.

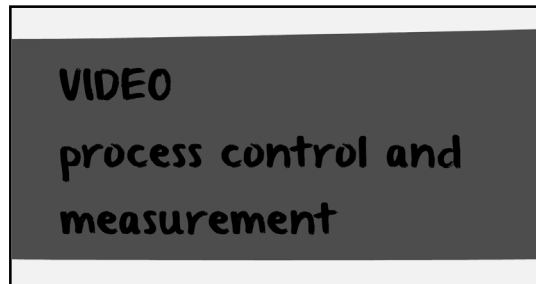
Truly great performers develop the habit of pushing through Phase III to Phase IV - *Informed Optimism* where the benefits of the effort begin to materialize. This phase is characterized by a realistic view of both the challenges and the benefits of the effort. Individuals then progress to Phase V where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

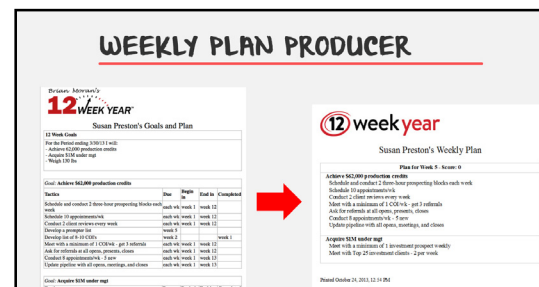
Key Points:

- 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...

VIDEO scorekeeping

Play video

SCOREKEEPING & MEASUREMENT

Lead & Lag Indicators

*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/week & schedule a min of 3/hk <input type="checkbox"/> Conduct a minimum of 3 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 calorie 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.

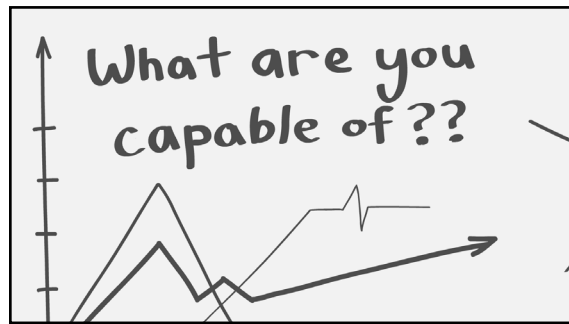
TRAINER'S NOTES

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.