

The 12 Week Year

PARTICIPANT WORKBOOK

HALF DAY



 12 week year

OVERVIEW OF THE 12 WEEK YEAR CONCEPTS

At The Execution Company we understand what may be the most important concept in business: It's not what you know; it's not who you know; it's what you implement.

In the end market leaders don't necessarily have better ideas; what sets them apart from others is that they execute more effectively.

Great ideas and strategies are worthless unless they are implemented. The marketplace only rewards those ideas that get executed.



There are five disciplines that support effective execution and success, they are:

DISCIPLINES

1. _____
2. _____
3. _____
4. _____
5. _____

There are three principles that are the foundation of high performance:

PRINCIPLES

1. _____

2. _____

3. _____

“You can’t build a reputation on what you’re going to do.”

- Henry Ford

BUILDING YOUR 12 WEEK PLAN

The purpose of a plan is to define what it will take to get you ‘there.’ If your Vision is the ‘what,’ then your 12 Week Plan is the ‘how.’

Remember that planning can be great fun. The process of thinking through, and then setting out what it will take to reach your goals, creates positive emotions and energy. It also makes your Vision seem more attainable. *You begin to shift from possible to probable.*

WHAT’S DIFFERENT WITH 12 WEEK PLANNING:

1. _____
2. _____
3. _____

STARTING WITH THE END IN MIND

Here is a sample *12 Week Plan*. In this lesson, you will create a similar plan. Plans have two tiers. They are:

Brian Moran's 12 WEEK YEAR
Susan Preston's Goals and Plan

12 Week Goals
For the Period ending 9/30/12 I will:
- Achieve 62,000 production credits
- Acquire \$1M under mgt

Goal: Achieve 62,000 production credits

Tactics	Due	Begin in	End in	Completed
Schedule and conduct 2 three-hour prospecting blocks each week	each wk	week 1	week 12	
Schedule 10 appointments/wk	each wk	week 1	week 12	
Conduct 2 client reviews every week	each wk	week 1	week 12	
Develop a prompter list	week 3			
Develop list of 8-10 COI's	week 1			
Meet with a minimum of 1 COI/wk - get 3 referrals	each wk	week 1	week 12	
Ask for referrals at all opens, presents, closes	each wk	week 1	week 12	
Conduct 8 appointments/wk - 5 new	each wk	week 1	week 13	

Goal: Acquire \$1M under mgt

Tactics	Due	Begin in	End in	Completed
Segment current client base and ID investment prospects	week 1			
Meet with a minimum of 1 investment prospect weekly	each wk	week 1	week 12	
Meet with Top 25 investment clients - 2 per week	each wk	week 1	week 12	

Goal: Personal Commitment

Tactics	Due	Begin in	End in	Completed
Work out 4 times/wk	each wk	week 1	week 12	
Date night 1/wk	each wk	week 1	week 12	
Read Bible daily	each wk	week 1	week 12	

12 Week Goals – this is where you want to be at the end of 12 weeks. It links to your vision. You may have multiple goals, just remember that “less is more,” the more focused your plan is the more effective you will be.

Tactics – this is how you will accomplish each Goal. For each goal you create tactics (actions) that you will take in order to achieve your goal.

How the plan is structured and written has a huge impact on your execution. Vague or poorly written goals and tactics will hinder effective execution. Likewise, a well-constructed goal is clear and precise, thereby making implementation easier.

PLAN CRITERIA

There are five criteria to adhere to when writing a plan:

1. Specific & measurable – Quantify and qualify. The more specific, the better!
2. Stated positively – Focus on what you want to happen that is positive. As an example rather than “quit smoking,” you would “become a non-smoker.”
3. Realistic stretch – If you can accomplish the strategy without doing anything different, then you probably need to stretch more; if it is absolutely impossible, then factor it back a little.
4. Accountability – Individual accountability is critical. Everyone’s challenge is no one’s challenge.
5. Time bound – There is nothing like a deadline to get and keep things moving.

12 WEEK GOAL

FOR THE 12 WEEK YEAR ENDING __/__/__ I WILL:

1. _____
2. _____
3. _____

MIND MAPPING EXERCISE



GOAL #1

A 'TACTIC' IS DEFINED AS:

12 WEEK PLAN WORKSHEET

12 WEEK GOALS

To ultimately live my vision, for the period ending ___/___/___ I will:

1. _____
2. _____
3. _____

Goal 1: _____

Tactics	Week Due
A: _____	_____
B: _____	_____
C: _____	_____
D: _____	_____
E: _____	_____
F: _____	_____
G: _____	_____

Goal 2: _____

Tactics

Week Due

A: _____

B: _____

C: _____

D: _____

E: _____

F: _____

G: _____

Goal 3: _____

Tactics

Week Due

A: _____

B: _____

C: _____

D: _____

E: _____

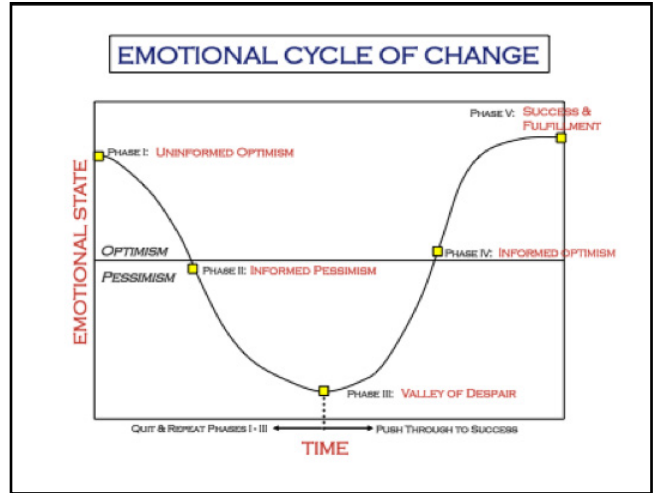
F: _____

G: _____

PROCESS CONTROL & SCOREKEEPING

At this point you have created a compelling vision and a plan to achieve your personal and business objectives: now the work begins. Having a plan is one thing; effectively implementing it is another. This is the stage where most people struggle. Installing a Weekly Routine is the “secret” to effectively implementing your plan.

EMOTIONAL CYCLE OF CHANGE



THE WEEKLY ROUTINE CONSISTS OF THREE ELEMENTS:

1. _____
2. _____
3. _____

1. PLAN YOUR WEEK

At the beginning of each week, you will create a Weekly Plan that contains the actions (tactics) that are due this particular week in your overall 12 Week Plan.

The Weekly Plan is such a powerful tool because it simply and effectively translates the entire 12 Week Plan into more manageable and focused daily and weekly action. It is the instrument that organizes and drives your week, becoming, in effect, your “game plan” for those 7 days. Please note – the Weekly Plan is not a glorified

Plan for Week 4
<p>Achieve 62,000 production credits</p> <ul style="list-style-type: none"> • Ask for referrals at all opens, presents, closes • Meet with a minimum of 1 COI/wk - get 3 referrals • Conduct 2 client reviews every week • Schedule 10 appointments/wk • Schedule and conduct 2 three-hour prospecting blocks each week
<p>Acquire \$1M under mgt</p> <ul style="list-style-type: none"> • Meet with Top 25 investment clients - 2 per week • Meet with a minimum of 1 investment prospect weekly
<p>Personal Commitment</p> <ul style="list-style-type: none"> • Read Bible daily • Date night 1/wk • Work out 4 times/wk

“to-do” list; rather, it reflects the critical strategic activity that needs to take place this week in order to achieve your 12 Week Goals.

2. DON'T GO IT ALONE – THE WAM

You are 7 times more likely to be successful if you participate in some form of peer support. There was a study conducted with patients that had severe medical conditions that required lifestyle changes in order to live. What they found is that when patients attended group support sessions that their success rate was nearly 7 times higher. The groups not involved in peer support had a 10% success rate. Those participating in support had a 77% success rate. The lesson is clear, if you are facing change, don't go it alone.

A WAM (Weekly Accountability Meeting) is a critical element of your execution process. This is a short meeting (15 – 20 minutes) typically held on Monday morning with a small group of peers that have all agreed to support, challenge, and encourage one another.

Who will be on your support team:

WAM PARTNERS

1. _____
2. _____
3. _____

The WAM Agenda

1. Individual Report Out
 - Results: Actual to Goal
 - Weekly Execution
 - What's working, where I'm struggling
 - Team feedback
2. Encourage & Close

3. SCORE YOUR WEEK

Measurement drives the process. It is the anchor of reality. To create your best results you will need to track your *12 Week Year results* daily, weekly, and monthly!

To make The *12 Week Year* work for you, you will need to measure both **lead and lag indicators**. Lag indicators are the end results, while lead indicators are the activities that produce the lag results.

BRAINSTORM LEAD AND LAG INDICATORS

MY INDICATORS

The most effective lead indicator available to you
is your _____!

Check off your accomplishments in Week 4	
Achieve 62,000 production credits <ul style="list-style-type: none"><input type="checkbox"/> Ask for referrals at all opens, presents, closes<input type="checkbox"/> Meet with a minimum of 1 COI/wk - get 3 referrals<input type="checkbox"/> Conduct 2 client reviews every week<input type="checkbox"/> Schedule 10 appointments/wk<input type="checkbox"/> Schedule and conduct 2 three-hour prospecting blocks each week	Acquire \$1M under mgt <ul style="list-style-type: none"><input type="checkbox"/> Meet with Top 25 investment clients - 2 per week<input type="checkbox"/> Meet with a minimum of 1 investment prospect weekly
Personal Commitment <ul style="list-style-type: none"><input type="checkbox"/> Read Bible daily<input type="checkbox"/> Date night 1/wk<input type="checkbox"/> Work out 4 times/wk	

3 PRINCIPLES OF HIGH PERFORMANCE

1. ACCOUNTABILITY

Accountability is not consequences, it's _____!

2. COMMITMENT

3. GREATNESS IN THE MOMENT



“Greatness is achieved in the moment.”

CONCLUSION

That's it! If you've gotten this far, you are officially "Periodized." Congratulations and welcome to the growing community of 12 Week Year™ practitioners! Now, the good stuff happens.

You have a vision and 12 Week Goals. You have a 12 Week Plan to reach those goals. You have the Weekly Routine to keep you on track each and every week of the 12 Week Year.

All that's left is for you to immerse yourself in the energy and focus of the system. Don't start a week without a plan. Don't end a week without scoring. Have the courage to confront your performance breakdowns and learn from them.

Thomas Edison said that if we only did what we are capable of doing, we would astound ourselves. You are capable of great things! You have everything you need to be great right now. Stop waiting to be great and start acting – create your first Weekly Plan and start executing. In a very short time, you will be amazed at the changes in your thinking, actions, and results.

Have an astounding 12 Weeks!

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