

The 12 Week Year

# PARTICIPANT WORKBOOK

ONE DAY



12

# 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.



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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. \_\_\_\_\_

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

*- Henry Ford*

## ENVISIONING THE FUTURE

Big thinking always precedes big achievement. Our vision of the future will profoundly shape our destiny. Winston Churchill said: "The empires of the future are the empires of the mind." We create things twice – first mentally and then physically.

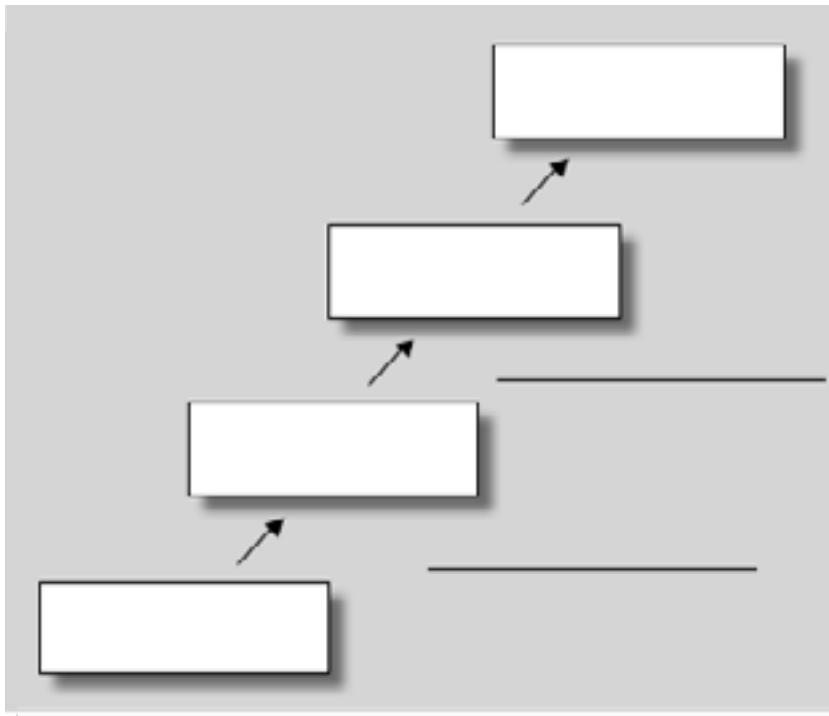
It is essential that we think about, dream about, and ultimately envision our futures. A compelling vision provides meaning and direction. People with a vision can overcome seemingly insurmountable odds. Holding a clear picture in your mind of the desired future will mobilize your creative efforts and generate the desire and energy to perform.

All significant accomplishment began with someone daring to think it possible. So often we sell ourselves short, we aim well below our potential. You can do far more than you've ever dreamed or imagined. You are currently surrounded by breakthrough opportunities. Put aside the doubts and fears; claim the future! At this juncture knowing how you're going to get there is not important. What's important is knowing where you want to be. Once decided, you can determine the best route, and the appropriate tactics to get there. For now *Focus on the Future*.

*"The indispensable first step to getting what you want in life is this: decide what you want."*

- Ben Stein

## ENVISIONING GREATNESS



## DREAMS HOPES AND DESIRES

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## PERSONAL JOURNEY

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## LONG-TERM VISION

### ASPIRATIONAL VISION

What is your vision for the long term - 5, 10, 15 years into the future?

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## 36-MONTH VISION

### 36-MONTH VISION AGE: \_\_\_\_\_

What is your vision? Three years from now what do you want to create in your personal life and in your business:

- Spouse, Family, Health, Spiritual, Social, Financial, Intellectual, Emotional, Life Style
- Income, Customer Profile, Marketing, Value Offer, Staffing, Strategic Partnerships, Time Off

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Three words that describe the future you:

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# 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 <b>12 WEEK YEAR™</b>				
Sasan Preston's Goals and Plan				
12 Week Goals				
For the Period ending 6/30/12 I will:				
- Achieve 62,000 production credits				
- Acquire \$1M under mgmt				
<b>Goal: Achieve 62,000 production credits</b>				
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 prospect list	week 1			
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 open, presents, closes	each wk	week 1	week 12	
Conduct 8 appointments/wk - 5 new	each wk	week 1	week 13	
<b>Goal: Acquire \$1M under mgmt</b>				
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	
<b>Goal: Personal Commitment</b>				
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:**

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## 12 WEEK PLAN WORKSHEET

**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:** \_\_\_\_\_

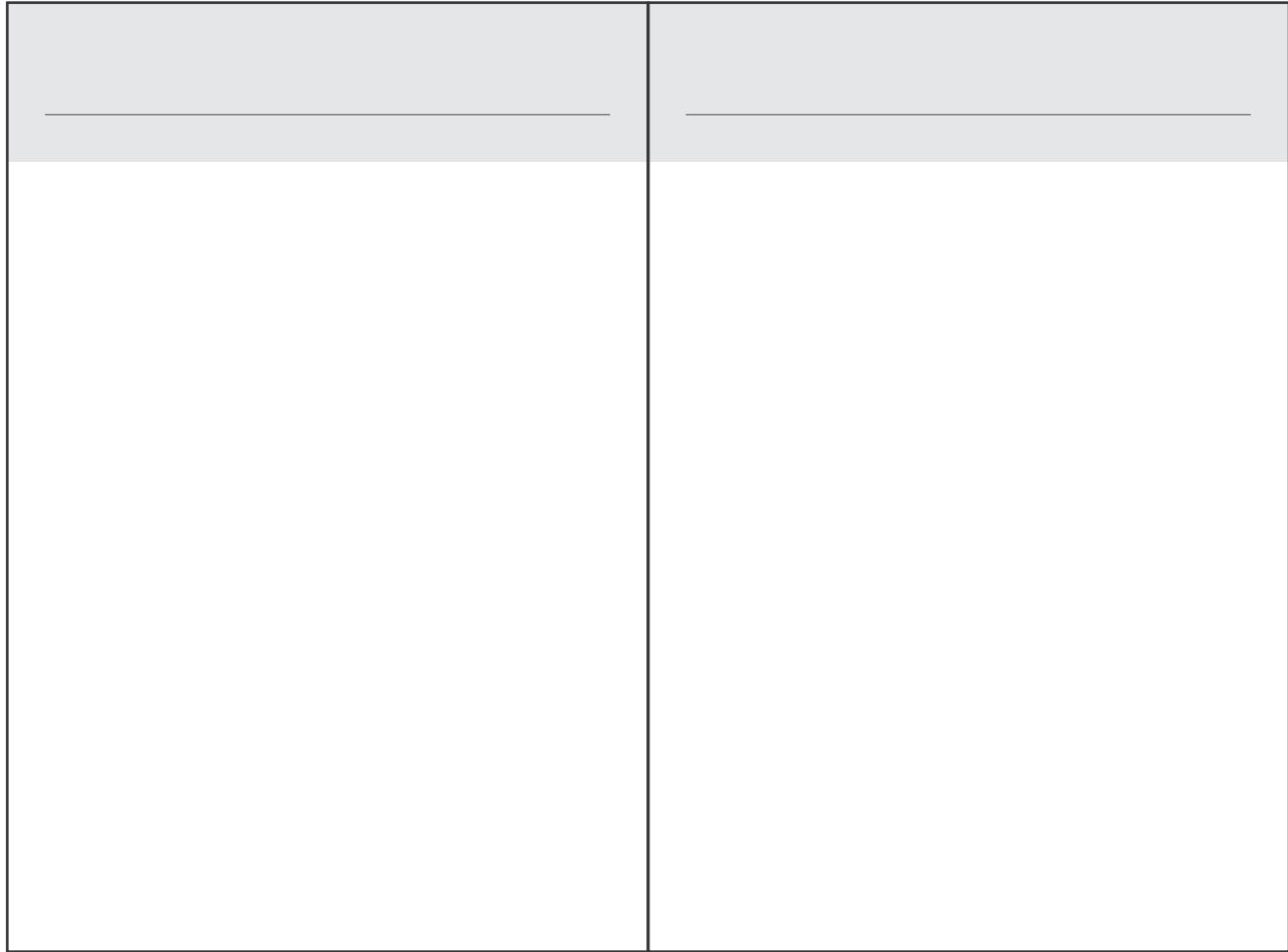
\_\_\_\_\_

**G:** \_\_\_\_\_

\_\_\_\_\_

## EFFECTIVE TIME USE

*"If you are not in control of your time, then you are not in control of your results."*



### NOTES:

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*"Time is the scarcest resource and unless it is managed nothing else can be managed."*

*- Peter Drucker*

## TIME BLOCKING

Benjamin Franklin said, “If we take care of the minutes, the years will take care of themselves.” The challenge is that throughout our week “things” come up - stuff that we didn’t anticipate that eats up valuable minutes. Trying to reduce these things is sometimes more frustrating than dealing with them. The key to successful time use is not necessarily in eliminating these unplanned interruptions but in regularly blocking out time to focus on the strategically important items, the “blue chips”.

Performance Time is a system that utilizes “time blocking” to maximize your effectiveness. There are three primary blocks: Strategic Blocks, Buffer Blocks, and Break-out Blocks.

**STRATEGIC BLOCK** – 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 anything. You focus all your energies on the preplanned items – the strategic and money-making activities. Doing so concentrates your intellect and creativity, and produces breakthrough results. You will be astounded by the quantity and quality of the work you produce.

### STRATEGIC BLOCK ACTIVITY

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**BUFFER BLOCK** – 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, thirty to sixty 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 we can reduce the inefficiency and take back control of our day.

## BUFFER BLOCK TASKS

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

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

### YOUR BREAKOUT BLOCK ACTIVITIES

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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 becomes. If possible, schedule routine tasks on the same day at the same time each day of the week. 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.

### NOTES:

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## MODEL WEEK

	Sunday	Monday	Tuesday	Wed.	Thursday	Friday	Saturday
7:00 am							
8:00 am							
9:00 am							
10:00 am							
11:00 am							
12:00 pm							
1:00 pm							
2:00 pm							
3:00 pm							
4:00 pm							
5:00 pm							
6:00 pm							
7:00 pm							

# 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

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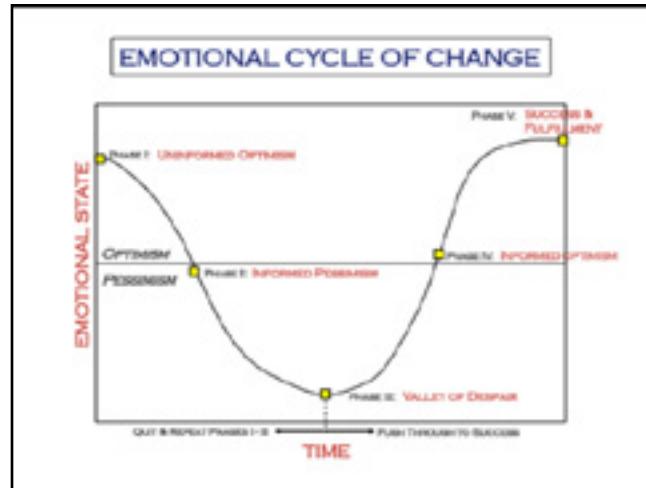
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## THE WEEKLY ROUTINE CONSISTS OF THREE ELEMENTS:

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

- Achieve 62,000 production credits
- 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

#### Acquire \$1M under mgmt

- Meet with Top 25 investment clients - 2 per week
- Meet with a minimum of 1 investment prospect weekly

#### Personal Commitment

- 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

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## MY INDICATORS

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The most effective lead indicator available to you  
is your \_\_\_\_\_!

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

# 3 PRINCIPLES OF HIGH PERFORMANCE

## 1. ACCOUNTABILITY

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Accountability is not consequences, it's \_\_\_\_\_!

## 2. COMMITMENT

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## 3. GREATNESS IN THE MOMENT

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*“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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