

# 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

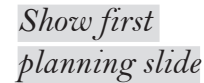
### III. DEVELOPING TACTICS

- 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

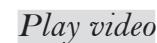
# INTRODUCTION



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

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## 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

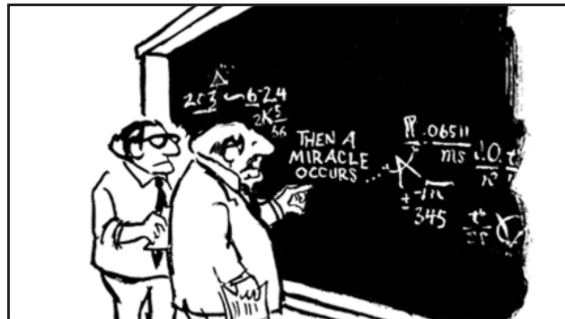
Does anyone need more time?

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?

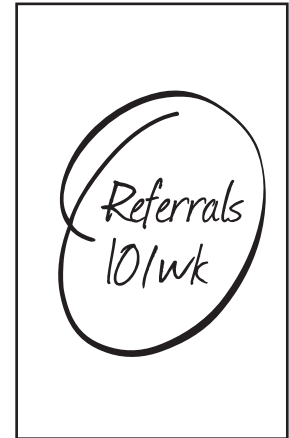
If not you will be in just a moment. Mind Mapping is a method that allows you to creatively brainstorm all the possible actions that you could take. The great thing about Mind Mapping is that it isn't linear. We are going to use it to develop the tactics for your goals. In this way, you tend to get more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

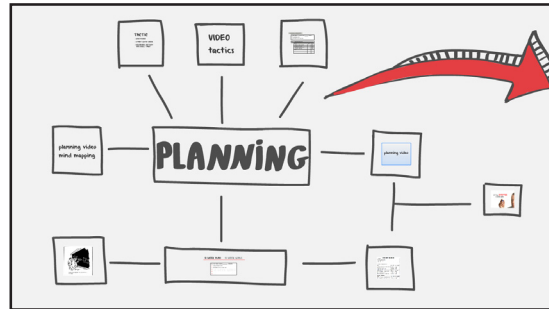
Ultimately, you don’t have to do all these items to accomplish your goal. Let’s see what advice Brian has for sorting through these.

**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.

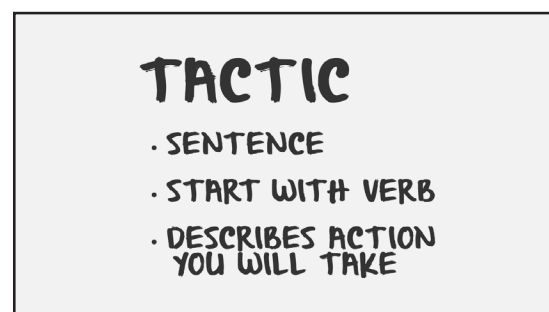
Then stop and decide if that is enough to accomplish your goal. Remember less is more. If you can get it done with 2, you don't need 3. If it takes 5 or 6 than that's fine. Keep it focused.

*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.



# VIDEO tactics

```

graph TD
    PLANNING[PLANNING] --- TEXT[TEXT  
NOTES  
VIDEO  
TEXT]
    PLANNING --- VIDEO[VIDEO  
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## PLANNING WORKSHEET

**12 WEEK GOALS:** FOR THE PERIOD ENDING \_\_\_\_\_ I HAVE/AM... .

- Submit \$45,000 in FYC
- Add \$900K in assets under mgmt
-

**GOAL #1** Submit \$45,000 in FYC

TRACTICS	WHO	DUE
a. Conduct 2 client reviews/wk		Wk 1
b. Establish list of 10 COI's		Wk 1
c. Meet with 2 COI's/wk - 4 ref		Wk 2

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**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.*

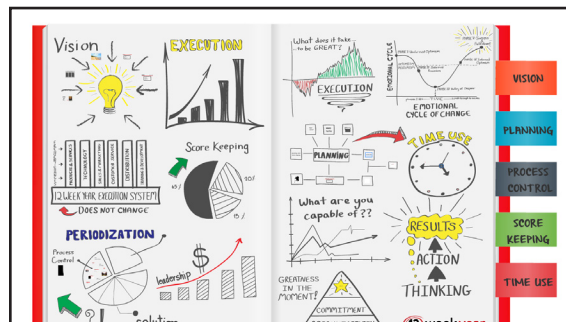
Let's take a couple of examples and critique them as we did with the goals.

*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!