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GREAT VISIONS precede GREAT ACCOMPLISHMENTS





↑ What are you

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PLANNING WORKSHEET

TO WERE GOING FOR THE NEXT QUARTER \_\_\_\_\_ 1 TIME/PERIOD ...

- Select \$750K in FIC
- Add \$750K in assets under mgmt

GOALS: Submit \$75,000 in FIC

TACTICS	MFO	USE
a. Conduct 1 client review/week		UB 1
b. Provide list of 10 COIs		UB 1
c. Meet with 3 COIs/week - 4 wks		UB 3
d. Schedule 7 appointments		UB 1
e. SEC		



TIME USE



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If you're not in control of your time, then you're not in control of your results



PERFORMANCE TIME

- STRATEGIC BLOCK
- RECONSIDER W/ VISION
- BUSINESS REVIEW - PERIOD GOAL, EXECUTION, METRICS, TACTICS
- ASSESSING PERFORMANCE BREAKDOWNS
- PLAN TACTICS - TARGET METS, PROFILE, COIs, MARKETING, PREP FOR SEMINARS
- PRACTICE - REFERRALS/SALES TALK, ETC.
- PLANNING FOR NEXT PERIOD

### PERFORMANCE TIME

- STRATEGIC BLOCK
- BUFFER BLOCK
- WHITE CHIP ACTIVITY  
VOICEMAIL, EMAIL, INTERRUPTIONS, ETC

### PERFORMANCE TIME

- STRATEGIC BLOCK
- BUFFER BLOCK
- BREAK-OUT BLOCK

### MODEL WORK WEEK

DAY	MORNING	AFTERNOON	EVENING	WEEKEND	WEEKEND
MON	STRATEGIC BLOCK	STRATEGIC BLOCK	STRATEGIC BLOCK	STRATEGIC BLOCK	STRATEGIC BLOCK
TUE	STRATEGIC BLOCK	STRATEGIC BLOCK	STRATEGIC BLOCK	STRATEGIC BLOCK	STRATEGIC BLOCK
WED	STRATEGIC BLOCK	STRATEGIC BLOCK	STRATEGIC BLOCK	STRATEGIC BLOCK	STRATEGIC BLOCK
THUR	STRATEGIC BLOCK	STRATEGIC BLOCK	STRATEGIC BLOCK	STRATEGIC BLOCK	STRATEGIC BLOCK
FRI	STRATEGIC BLOCK	STRATEGIC BLOCK	STRATEGIC BLOCK	STRATEGIC BLOCK	STRATEGIC BLOCK
SAT	STRATEGIC BLOCK	STRATEGIC BLOCK	STRATEGIC BLOCK	STRATEGIC BLOCK	STRATEGIC BLOCK
SUN	STRATEGIC BLOCK	STRATEGIC BLOCK	STRATEGIC BLOCK	STRATEGIC BLOCK	STRATEGIC BLOCK

### Susan Preston's Goals and Plan

12 Week Goals  
For the Period ending 30/01/11  
Achieve 100% production results  
Increase 10% working time  
Reduce 10% costs

Task	Due	Start	End	Completed
Review and conduct 1 hour per week	week 1	week 1	week 12	
Schedule 10 appointments	week 1	week 1	week 12	
Conduct 1 hour review every week	week 1	week 1	week 12	
Review progress for	week 1	week 1	week 1	
Review for all 10 100%	week 1	week 1	week 1	
Meet with a minimum of 1 client per week	week 1	week 1	week 12	
Get the volume of all open projects off	week 1	week 1	week 12	
Conduct 1 appointment 2 per week	week 1	week 1	week 12	
Update profiles with all open, pending, and done	week 1	week 1	week 12	

### SETTING EFFECTIVE 12 WEEK GOALS

### 12 WEEK PLAN 12 WEEK GOALS

FOR THE PERIOD ENDING \_\_\_\_\_ 1 000/000 ...

- Submit 100% to 100
- Add 100% in profit under 100
- 12 WEEK GOALS

"I think you should be more explicit here in STEP TWO."

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↑ What are you

# TACTIC

- SENTENCE
- START WITH VERB
- DESCRIBES ACTION YOU WILL TAKE

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↑ What are you

"BE INTENTIONAL"



# ACCOUNTABILITY

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## Process Control



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### THE WEEKLY ROUTINE

- I. The Weekly Plan
- II. Peer Support
- III. Scorekeeping

### WEEKLY PLAN PRODUCER

The image shows two forms for the '12 week year' program. The left form is a 'Weekly Plan Producer' and the right form is a 'Weekly Plan'. A red arrow points from the left form to the right form.

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Your odds of success are 7 times greater when there is peer support!



### WAM AGENDA

#### INDIVIDUAL REPORT OUT

- Period Goal - Actual to Period
- Last week's score
- Focus for this week - Intentionality

\* Note: if individual has scored under 95% two consecutive weeks or more, ask "What are they committed to scoring this week and what will they do different this week from last?"

#### CLOSE

Encourage one another!

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### SCOREKEEPING & MEASUREMENT

#### Lead & Lag Indicators

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

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## WEEKLY SCORECARD PRODUCER

WEEKLY SCORECARD PRODUCTIONS IN WEEK 1
<b>WEEK 1: PLAN TO WIN</b>
<input type="checkbox"/> Plan a minimum of 1 project that it involves a mix of tasks
<input type="checkbox"/> Consider a minimum of 2 other opportunities per week
<input type="checkbox"/> Follow up with prospects weekly to close
<input type="checkbox"/> Break into tracking and graph it weekly weekly

THE WEEKLY SCORECARD PRODUCER  
WAS NOT EXISTING, HE'S THERE!

## THE WEEKLY ROUTINE

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



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What are you  
capable of??