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**GREAT VISIONS  
precede  
GREAT  
ACCOMPLISHMENTS**



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**Susan Preston's Goals and Plan**

12 Week Goals  
For the Period ending 5/30/11 will:  
- Achieve \$2,000 production credits  
- Acquire \$1M under mgmt  
- Reach 150 lbs.

Goal: Achieve \$42,000 production credits

Tasks	Due	Begin In	End In	Completed
Schedule and conduct 7 flow-line 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 5			
Develop list of 8-10-000's	week 2		week 1	
Meet with a minimum of 1 000/week - get 1 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 12	
Update pipeline with all opens, meetings, and closes	each wk	week 1	week 12	

Goal: Acquire \$1M under mgmt

Tasks	Due	Begin In	End In	Completed
Segment current client base and ID investment prospects	week 1		week 1	
Meet with a minimum of 1 investment prospect weekly	each wk	week 1	week 12	
Meet with Top 20 investment clients - 2 per week	each wk	week 1	week 12	

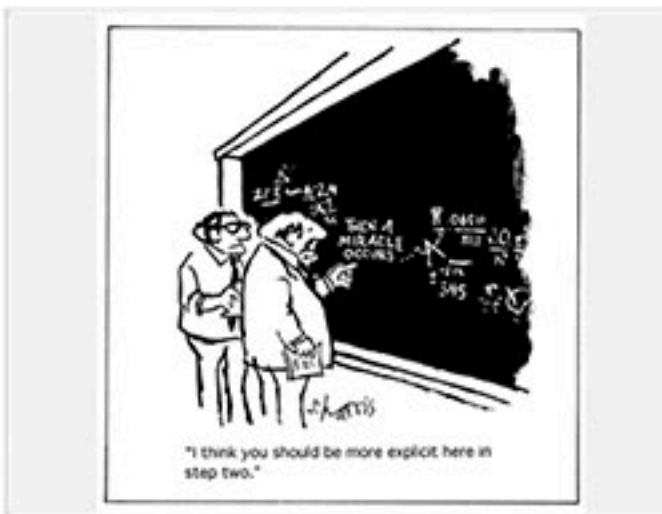


**12 WEEK PLAN 12 WEEK GOALS**

FOR THE PERIOD ENDING \_\_\_\_\_ 1 8M/2PM ...

- Submit \$75,000 in FIC
- Add \$700K in work under mgmt

12 WEEK GOALS



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# TACTIC

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

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## PLANNING WORKSHEET

12 WEEK GOALS: FOR THE PERIOD ENDING \_\_\_\_\_ 1 QTR/6M ...

- Submit \$75,000 in FYC
- Add \$700K in assets under mgmt

GOAL #1: Submit \$75,000 in FYC

TACTICS	WHO	QTR
a. Conduct 2 client reviews/mt		Q3 1
b. Establish list of 30 COIs		Q3 1
c. Meet with 2 COIs/mt - 4 req		Q3 2
d. Schedule 7 openers/mt		Q3 1
e. ect.		



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



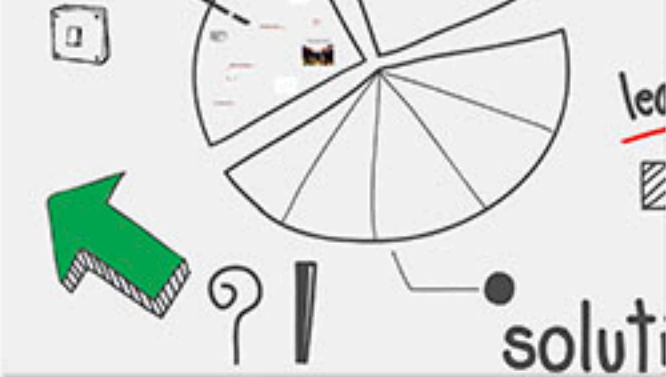
# ACCOUNTABILITY

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GREATNESS  
IN THE  
MOMENT!



Process  
Control



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## THE WEEKLY ROUTINE

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

## WEEKLY PLAN PRODUCER



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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 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?"

### 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

CHECK OFF YOUR ACCOMPLISHMENTS IN WEEK 1	
<b>OVER 200,000 IN 240 BUSINESS</b>	
<input type="checkbox"/> Sell a minimum of 4 properties & include a mix of them	
<input type="checkbox"/> Conduct a minimum of 2 initial appointments per week	
<input type="checkbox"/> Follow up with prospects weekly to close	
<input type="checkbox"/> Create sales tracking and graph & update weekly	
<b>LIFE &amp; LEAD</b>	
<input type="checkbox"/> Eat 1,000 or less calories per day	
<input type="checkbox"/> Do 30 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 THINGS

## 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??

