

**12** week year

# INTRODUCTION



# WELCOME TO THE 12 WEEK YEAR

You now have in your possession the most powerful goal achievement system ever created. Just owning it won't do much for you though, you will have to work through it, and apply it. This Orientation Guide will get you started on your way. In conjunction with the Orientation Video, it will provide you with an overview of the system, processes and tools that will enable you to achieve more in the next 12 weeks than most do in 12 months.

## PERIODIZATION

A 12 Week approach that moves beyond training to focus on the critical factors that drive production and life balance.



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## 5 DISCIPLINES OF THE 12 WEEK YEAR

### 1. Vision

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### 2. Planning

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### 3. Process Control

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#### 4. Scorekeeping

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#### 5. Time Use

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## 3 PRINCIPLES OF THE 12 WEEK YEAR

### 1. Accountability

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

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### 2. Commitment

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### 3. Greatness In The Moment

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

# THE 12 WEEK YEAR PROCESS

Throughout the next 12 weeks we will guide, support, coach, and inspire you to accomplish the things that are most meaningful to you.

There is a philosophy and process that all successful people understand and utilize. The key to high achievement is to recognize that knowledge and intellect as well as strategy and ideas only matter if you implement: if you EXECUTE.

Knowledge is only powerful if you act on it. And great ideas are worthless unless they are implemented. It's not enough to know what to do. Knowing and doing are two very different things.

The 12 Week Year will teach you how to execute and provide you with the structure and tools to achieve your goals.

The process begins by you establishing one or more goals and identifying a few key actions to accomplish each goal. Your goals and plans are then entered into *Achieve!* on the member site. *Achieve!* will create a Weekly Plan for you each week, organizing the tactics (actions) that need to happen that week. The system also creates a dashboard that tracks your progress as you check off actions that you complete each week.

Every day you will receive a Challenge Video to keep you on track. Most videos are only 2-3 minutes in length, but in those few minutes will provide you with the information and inspiration you need to be successful. Be sure to establish the habit of setting aside a few minutes each day to view the videos.

You will also have the chance to participate in a regular coaching call. The call is an opportunity for you to hear directly from the co-authors Brian Moran and Mike Lennington. You'll gain valuable insights on how to overcome obstacles and make critical game time adjustments.

The 12 Week Year Challenge provides you with all the resources you need to be successful. From the Member Site, to *Achieve!*, to the Daily Videos you have everything you need to achieve your goals in just 12 weeks. Additional resources are available via "downloads" from the member site.

Make a commitment right now to take full advantage of all that The 12 Week Year has to offer you and get ready for a life-changing 12 weeks!

**Welcome to the 12 Week Year community!**

12 week year

# VISION



# 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*

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# BUILDING YOUR VISION

In this **First step** you will be asked to do some initial vision work. While it sounds simple enough, vision work can require a fair amount of effort. In formulating our vision, we must let our mind expand to imagine and even embrace possibilities we often push aside in our daily lives as being not immediate enough to command our attention, impractical, or even too audacious to even consider, let alone pursue. There is no right or wrong answer in vision work.

Please get comfortable, remove distractions, and let’s get started.

On to Exercise #1 – creating your long-term vision....

## ASPIRATIONAL VISION

In this exercise we will start with a long-term, aspirational vision. Construct a vision of your life 5, 10, 15 years into the future. Be bold, be courageous; create a life vision that inspires you and fulfills your purpose. There are no right or wrong answers. This is the life you deeply desire.

*My Long-Term Vision*

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## 3 YEAR VISION

The **Second step** is to bring your vision more near term and craft your three-year vision. Your three-year vision represents a stake in the ground for you. It is time-bound, and more specific than your longer-term vision. It represents progress toward your long-term vision, and it also defines what greatness looks like for you three years from today. It may include elements of your long-term vision, and will most likely be a mix of personal and business/career.

In the box provided, enter your age three years from today. Then determine what you want your life to be like in three years. Consider the following areas:

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



My 3-Year Personal Vision \_\_\_\_\_ Age \_\_\_\_\_

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## LEVERAGING YOUR VISION

Now that you have a compelling vision, the secret is to stay connected with it. Here are three things you can do to make it even more powerful:

### **Action 1: Share it With Others**

By sharing our vision we become committed to it. When we tell someone important to us what we want in life, we feel more responsibility to act.

### **Action 2: Stay in Touch with Your Vision**

Print it out and keep it with you. Review it each morning. Update it every time that you discover ways to make it more vivid and meaningful to you.

### **Action 3: Be Intentional**

At the end of each day, take a few minutes to reflect on the progress that you made today. Did it move you forward, or was it filled with activity that wasn't related to your vision? Resolve to be intentional to make progress on your vision – what action will you take tomorrow?

Armed with our vision for inspiration, it is time to begin the exciting process of creating your roadmap to the future of your dreams – your 12 Week Year™ Plan!



12 week year

# PLANNING



# BUILDING YOUR 12 WEEK PLAN

In order to set up your 12 Week Year™, you will need to establish specific goals and build a 12-week plan to achieve your goals.

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.*

## STARTING WITH THE END IN MIND

Bill Preston's Goals and Plan				
<b>Goal</b>				
Achieve unit production of \$525,000				
Generate 15 CPQ's and hire 2 new Advisors				
<b>Goal: Achieve unit production of \$525,000</b>				
<b>Tactics</b>	<b>Due</b>	<b>Begin in</b>	<b>End in</b>	<b>Completed</b>
Review each Advisors 12 Week Plan	week 1			week 1
Meet with all new org Advisors weekly and review Execution & Results	each wk	week 1	week 12	
Conduct monthly coaching session with all Sr. Advisors - 2 per week	each wk	week 1	week 12	
Conduct 5 joint work appointments each week with new org Advisors	each wk	week 1	week 12	
Chart team and individual production and progress towards 12 Week Goals weekly	each wk	week 1	week 12	
<b>Goal: Generate 15 CPQ's and hire 2 new Advisors</b>				
<b>Tactics</b>	<b>Due</b>	<b>Begin in</b>	<b>End in</b>	<b>Completed</b>
Meet with 2 COI's each week - min 4 candidate introductions	each wk	week 1	week 12	
Establish a recruiting pipeline and update weekly	each wk	week 1	week 12	
Pull 20 candidate names for cold sources each week and contact	each wk	week 1	week 12	
Meet with 1 advisor per week for candidate referrals - min 1 name	each wk	week 1	week 12	
Identify at least 2 candidates per week from personal observation	each wk	week 1	week 12	
Schedule 4 first interviews per week, conduct at least 3	each wk	week 1	week 12	

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

**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 “achieve a 2% error rate,” you would focus on “achieve a 98% accuracy rate.”
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 PLAN WORKSHEET

The **first step** is to set your goals. Using the vision work you completed in the previous handout, set a specific and measurable goal (or goals), for the upcoming 12 Week Year.

Your goal should represent realistic progress toward your three-year vision, and it should create excitement all on its own. You may find that you need more than one goal. Just keep in mind that “less is more.” It is important that you focus.

Once your goals are clear and focused, we move on to the **second step** where you will need to develop a plan to achieve them. At this stage, keeping it simple is the best approach. For each goal, determine the “critical few” actions that you will need to implement to achieve the goal. Write these tactics in a way that clearly describes the actions you will need to take.

When you’ve completed your plan worksheet, you can transfer your goals and tactics to *Achieve!*, under “My 12 Week Plan.”

### 12 WEEK GOALS

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

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

Goal 1: \_\_\_\_\_

Tactics	Week Due
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A: _____	_____
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B: _____	_____
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C: _____	_____
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D: _____	_____
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**D:** \_\_\_\_\_

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

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

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

**Goal 2:** \_\_\_\_\_

Tactics	Week Due
<b>A:</b> _____	_____
<b>B:</b> _____	_____
<b>C:</b> _____	_____
<b>D:</b> _____	_____
<b>E:</b> _____	_____
<b>F:</b> _____	_____
<b>G:</b> _____	_____

12 week year

# THE WEEKLY ROUTINE



# THE WEEKLY ROUTINE

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.

## 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.

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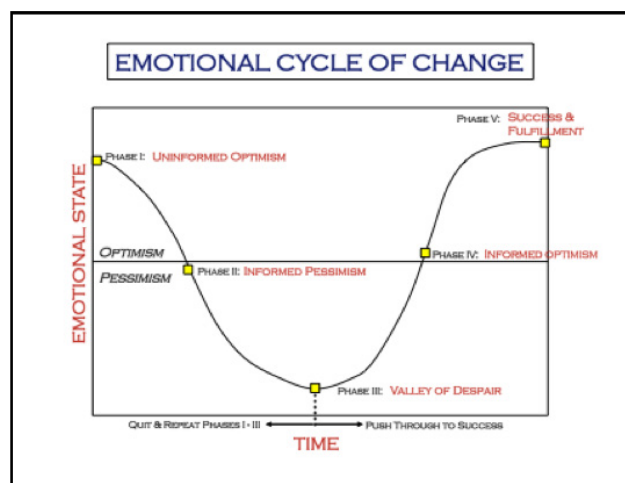
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Please note – the Weekly Plan is not a glorified to-do” list; rather, it reflects the critical strategic activity that needs to take place this week in order to achieve your 12 Week Goals.

## 2. DON'T GO IT ALONE – PEER SUPPORT & 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
  - Group 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.

**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 mgt</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>	



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That's it, 3 simple steps that will take you approximately 20 minutes per week. Three steps that are easy to do, and even easier not to do. So make a commitment to incorporate the Weekly Routine. Will it be uncomfortable at times – yes. Will it be challenging at times – yes. That's what it takes to get better. But that's OK, you can handle it.

As you incorporate the Weekly Routine you will find yourself working with greater focus and getting results faster than ever before.