

12 Week Year Pilot Proposal

ENGAGEMENT SCOPE

The Execution Company is proposing to conduct a pilot implementation of The 12 Week Year in two to four Business Centers. The 12 Week Year™ is our proven process that enables more effective execution and higher performance for individuals, teams, and entire organizations.

PURPOSE

The objectives of the pilot will be to validate the performance improvement potential of the 12 Week Year within specific Business Centers, directly improve sales productivity and production, and increase recruiting and agent retention.

PROGRAM ELEMENTS

We will work with advisors and agency management to effectively apply The 12 Week Year. Specifically we will deliver the following:

1. **Initial Agency Training** – The 12 Week Year pilot kicks-off with a full-day training for the agency advisors, management and staff. This interactive session will prepare the group to fully apply the 12 Week Year in their roles, and will establish the 12 Week Year as their execution platform. Each participant will:
 - Understand the benefits of operating in 12-week execution cycles
 - Develop a vision that combines both personal and business elements
 - Set 12 Week Goals aligned with their vision
 - Build a 12 Week Plan that defines the daily and weekly actions needed to achieve their Goals
 - Learn to apply the simple 3-step weekly execution routine to
 - Develop a set of key lead and lag indicators to monitor progress and adjust if needed each week
 - Learn to apply our powerful, yet simple, time blocking approach that allocates time each week to their top priority activities
 - Develop greater capacity for personal accountability, a stronger ability to keep commitments, and a deeper appreciation for the value of acting now

In the end, they will leave the session with a compelling vision, clear goals, a focused plan and the tools and process necessary to effectively execute.

2. **Leader Track** – As with most agency-wide efforts, the overall success of the 12 Week Year is highly dependent on the effectiveness of the front-line management. Each week we will conduct a short, but impactful, online training session for the leadership team. The leader track focuses on helping the managers apply the 12 Week Year both as a practitioner to drive results in their area of responsibility, and as

a leader to leverage the 12 Week Year as a coaching platform with their advisor groups.

3. **Follow Up Agency Session** – A second live training will be conducted at the end of the first 12 Week Year. In this session, the team will learn how to assess progress and how to identify breakdowns and opportunities. The learning is then leveraged as they create their next round of 12 Week Goals and Plans.
4. **On-going Support** – Each advisor and manager will have unlimited access to a suite of online tools and resources. These include:
 - Achieve: our online execution system that makes applying the 12 Week Year easy and efficient
 - Performance Videos: each 12 Week Year has a series of short daily or weekly videos that provide coaching, guidance, and inspiration.
 - Best Practice Plans: your team will have access to industry best practice plans for sales production and recruiting.

TIMING

The pilot will run for 13 weeks from the initial training session. The Business Centers (advisors and managers) will however have full access to the tools and resources for a full twelve months from the date of the initial training.

PROGRAM FEE

The fee for the program as outlined above, with full access to the member site and available resources for the entire Business Center is \$_____ plus travel related expenses, per center.

These deliverables are proprietary to The Execution Company, and this pilot is restricted to just the advisors and managers directly affiliated with the pilot Business Centers.