

## FOREWORD

Before all else, make a decision to grow this quarter!! This could be team sales growth, personal sales growth, recruiting growth, leadership growth, physical fitness growth, spiritual growth, relational growth. Regardless, if you're not growing you're dying. Once you know in what area you want to grow, you are left with coming up with an actionable plan to achieve the desired growth. The steps below will give you a simple process to follow to formulate a great plan.

Secondly, the purpose of setting goals is to help you accomplish more than you would have without a goal. This is meant to be inspiring, to help push you when you encounter those points in the quarter where you need motivation. Success in our chosen field requires us to do simple things that are challenging because we often don't feel like doing them. It's easier to get ourselves to do those things when we know the results they will bring. You have to find a result that you want bad enough that you'll willingly subject yourself to the pain of the process. That being said, I would encourage you to do 2 things above all else as you sit down to set your goals:

1. Pick out something you're really passionate about having...or doing...or being. Figure out a result you want bad enough that you're willing to do the things you don't want to do, and you'll do them with a smile on your face! You don't have to love the work, you just have to love the results it gets you.
2. Be realistic about the schedule you can commit to. For example: if you missed a day or two in the field every single week last quarter because of scheduling issues with the kids, then be realistic about that! If it's likely to happen again this quarter, then simply plan around it. Say you need to get 20 demos in a week, then plan those 20 demos in for 3 work days rather than 5 days. When you committed to 3 days and then work 3 days, you'll feel really good about it. When you can get 5 full days in, you will feel fantastic! Contrast that with the feeling you have when you committed to 5 work days and then finished the week with 3 work days.

## GENERAL NOTES AS YOU START SETTING YOUR GOALS:

- Get your planner in front of you so you can look at the quarter overall and be aware of what big events will be going on during the quarter.
- First figure out what you really want out of the quarter, then convert that into measurable results. Once you have a measurable result, you can very easily create an actionable plan to achieve the necessary results.
- Think through non-business goals that need to fit in your schedule before work; i.e. plan your work around your "big rocks" rather than trying to squeeze in your big rocks around work. Date nights or workouts are way more likely to happen if they are planned in before the quarter starts rather than the wait-and-see approach going into each week or each day. And date nights and workouts are exactly the kind of things that will make you more effective when you are working.

## HOW TO CONVERT YOUR GOALS TO A GREAT PLAN:

1. Take your desired goal(s) and convert to a measurable result. If your measurable result is an income goal, convert your income goal into the number of families you need to protect then convert that to how many contacts or demos you need to do to protect that many families. Here's how to do that:

**Example: I want to cash flow \$15,000 in advances this quarter (that would put me on track to make \$100,000 for the year). To convert that:**

\$15,000 divided by 60% advance = \$25,000 annual commissions

\$25,000 annual commissions divided by 40% commission (or whatever your % is) = \$62,500 GAP

\$62,500 GAP divided by your package size (pulled from the stats website under statistics reports) of \$800/app = 78 families protected

78 families protected divided by your closing % on demos (pulled from stats website as well) of 25% = 313 demos

2. Plan the slow weeks first by planning the days you're not going to be working (holidays, birthdays, vacations, weddings, family visiting, etc.)
3. Plan your big weeks second (Trainmores, weeks that you're working Saturdays, re-servicing trips, push weeks, wrap arounds, etc.)  
\*\*the earlier in the quarter you plan your big weeks, the better. That momentum carries through the second half the quarter\*\*
4. Fill in your remaining weeks and days with what you need to do to be on track with the quarterly results you're aiming for.

**Example:**

If your goal for the quarter required you to do 300 demos (your measurable result), here's an example of what your quarterly plan might look like:

- There is one entire week you won't be working at all, and then 2 other weeks where you'll only have 3 work days. So, one week you plan for 0 demos and the other two weeks are 15 demo weeks each (total of 30 demos for those 3 weeks)
- There are 4 big weeks in the quarter – 3 Trainmores where you'll be working a full Saturday, and then one other push week that you're going back to reservice or follow up on some dangling leads from a previous Trainmore. Those weeks, you know that you'll be able to hit 40 demos each week, for a total of 160 demos.
- Now we have 6 "normal" weeks left and we've already accounted for 190 of our 300 demos, so that leaves us with 110 demos to achieve in those 6 weeks. That means that each week we'll need to average just over 18 demos, so let's round up to 19 demos per week.

**BONUS NOTES FOR SUPERCHARGING YOUR GOALS:**

- Write a paragraph or two about how you will feel about yourself when you accomplish your goals. Put this somewhere where you will see it and re-read it constantly.
- What things will you need to say "no" to in order to accomplish your goals this quarter? Make a list!! Knowing what you need to *stop* doing is more valuable to becoming successful as knowing what you need to do. Most people know what they need to do, but the reason they fall short of their goal is because of the myriad of good things they could be doing that get in the way of the few great things they need to do. Great results come by consistently doing what you don't feel like doing; mediocre results come by consistently doing what's easy or comfortable. So identify not just what you need to do, but what you need to say no to doing.
- Who can help you hit your goals this quarter? Think of people who have achieved what you want to achieve and plan intentional time with them. "One year from now you will be the same person you are today except for the people you hang around and the books you read."