

Lead Generation
36:12:3

Power Session 11:
Living Your Goals

Stacia Thompson

Ready to Go 200 mph? Business Planning for the Solo Agent.

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Power Session 11: Living Your Goals

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Power Session 11: Living Your Goals

In this Power Session ...

- [1]** *Introduction*
- [2]** *Your Big Why*
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- [8]** *Putting It All Together*

Notes

Introduction

Ground Rules

1. Arrive to class on time and return promptly from breaks.
2. Move quickly when you are instructed to form small groups or partner with someone to role-play.
3. Limit your side conversations.
4. Turn your cell phones and pagers to vibrate or OFF.
5. Feel free to stand and walk around if you find yourself getting tired.
6. Accept the reality of time and participation.
7. Respect the different learning styles and opinions of others.
8. Help each other learn. None of us is as smart as all of us working together to improve our skills and knowledge.
9. Consider everything we do in class confidential. What is discussed and role-played behind closed doors *stays* behind closed doors.
10. Have fun!

How You Will Learn

Learning Methods

1. In this manual, you will find:
 - **Models and systems** that are tested and proven ways of accomplishing Big Goals.
 - **Exercises and discussion** that allow you to test new skills and clarify your thinking in a safe environment.
 - **Stories, lessons learned, anecdotes, and advice** from top agents who offer invaluable insights.
2. Your classroom learning experience will be enhanced by:
 - **PowerPoint slides** to help keep you on track with the topics inside the course manual.
 - **KWConnect videos** to enrich your understanding of the course material. Watch for the camera icon in your course materials.
 - **Your classmates and instructor.** Don't underestimate the value of what you can learn from your peers, who ask great questions, who share their experiences, and who participate in exercises with you.



Accountability Methods

Accountability is, in the KW experience, the most crucial part of goal achievement. To support your goal setting, we recommend you:

1. Develop a Lead Generation Action Plan. At the end of this course, you will create a plan that outlines the specific actions you will take to achieve your lead generation goals. You will also create a calendar that helps you schedule your specific activities into your daily 3 hours of lead generation time.
2. Select an accountability partner or program to help you measure, evaluate, and make adjustments to your Action Plan. Look to the following resources for an accountability relationship:



- KW MAPS Institute individual and group coaching
- Market Center Productivity Coach
- Team Leader
- ALC Members
- Peers

Where You Are Today

Where are you today with your lead generation efforts? Get into the habit of taking accountability for your actions and your progress. Take time to share with your instructor and your peers your aha's, your challenges, and your next steps.

Directions:

1. List the lead generation activities you completed during the last 24 hours.
2. What were your aha's?
3. What were your challenges?
4. Discuss what you will do differently in the next 24 hours.

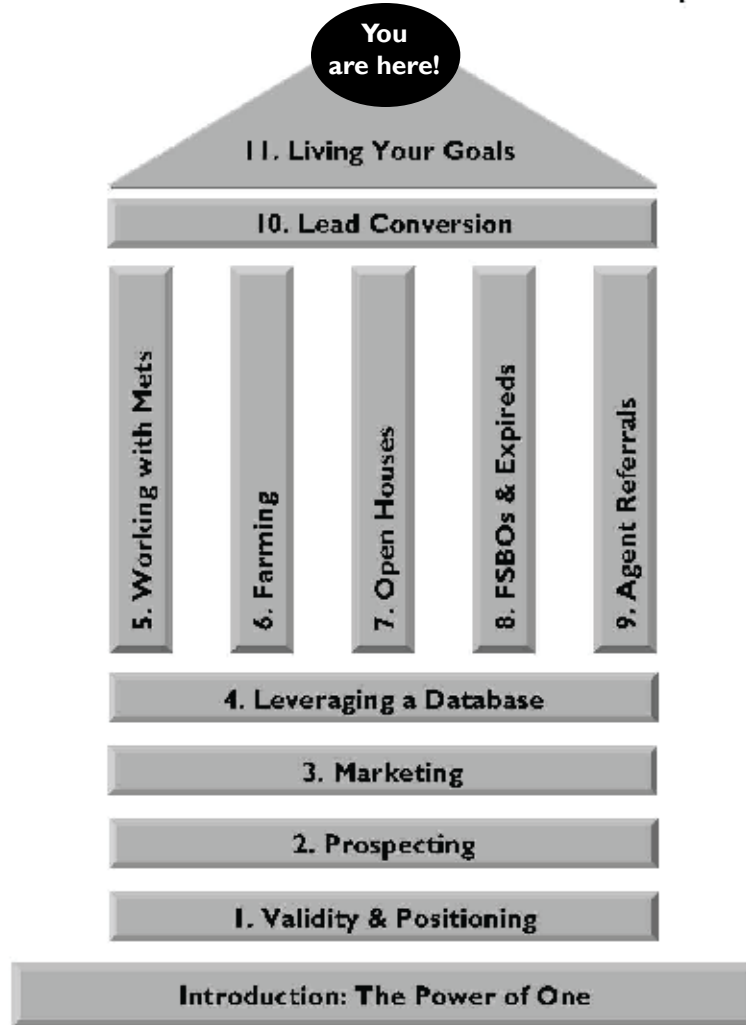
Time: 10 minutes

	<u>Time Spent on Activity</u>
1. Lead Generation Activities:	
2. My aha's from these activities:	
3. The most difficult part of these activities:	
4. What I will do differently in the next 24 hours:	

Why You Are Here

You built a foundation on mindset, validity and positioning, and essential strategies. Then you learned to apply these strategies and convert your leads. Now, you'll conclude the Lead Generation 36:12:3 course with a Power Session on how to meet and ultimately live your goals. This session will direct you to success through business planning for the solo agent.

Lead Generation 36:12:3 Course Map



Ready to Go 200 mph?

Read, underline, and share ...

Do you want to close 36 transactions or more a year? As Gary Keller says, “You’re a Ferrari. Are you ready to go 200 mph? Are *you*?” You can do it. But wishing for it is not going to tell you exactly what you have to do *right now* to achieve it. Business planning will.

Mary Harker, a thriving agent with the Harker Five Star Team from Dallas, Texas, makes it simple. “If you want your business to grow,” she says, “you better have a written goal.” Business planning is all about goals. You set a goal, monitor your progress toward it, and then stay accountable to it.

The Economic Model, the Lead Generation Model, the Budget Model, and the 4-1-1 are your guideposts to business planning. With these tools you can clarify where you want to be, how you’re going to get there, how much it will cost, and what you have to be accountable to on the day-to-day basis to make it happen.

Jana Caudill, prosperous agent with The Jana Caudill Team from Crown Point, Indiana, thinks of business planning like preparing for a vacation. She says, “You don’t just hop in the car, go to the airport, and not know where you’re going. You visualize what it is you’re trying to accomplish and then you put it into action. I know exactly where I am going, what it is I’m going to pack, and who it is I am taking with me on this venture.”

Do you know where you’re going? Get ready to put your foot on the gas! We’re planning for your success right now!

Rick Geha has had many roles at Keller Williams Realty, including OP of multiple Market Centers and KWU Master Faculty. While a top-producing agent with the Rick Geha and Coco Lewis Real Estate Group from Fremont, California, he learned the power of having a business plan and tracking his numbers. For years, Rick would tell people to have written goals in the form of a business plan, though he didn’t have one himself. In 1995, though, he developed a business plan and he tracked his progress toward his goals. “Finally!” he says. “What a difference it made!” He’s had one and lived his goals ever since.



On KWConnect, view Session 1 of the Business Planning course (5:54 minutes) for an overview of what a business plan is.

What Will Make This a Great Training Experience

-
-
-
-

Your Big Why

Why do you want to make 36 or more transactions this year? What does it mean to *you*? Do you want to move from the Growth phase of your career to the Achievement phase? We know you can do it, but why do *you* want to? Do you want to become a Millionaire Real Estate Agent and gross a million? Great! But, why do *you* want it? What's driving you?



You've got to know your Big Why to stay motivated day-to-day. If you don't know why you set your goals in the first place, you're not going to know why you're striving to achieve them. When you answer your Big Why, you've got your answer when you wonder if you should pick up the phone one more time.

Gary Keller says that a Big Why is rarely about the money itself. It's about what the money would empower you to do. What would money empower you to do?

Chris Heller is a flourishing agent with The Heller Team in Encinitas, California. Chris's Big Why is about traveling with his family. His success means achieving it. He explains, "I have to be making money so that the financial freedom will allow me to do—not only on a daily basis, but on a weekly, monthly, and yearly basis—the things I want to do. We have vacation homes in different parts of the country and out of the country. For the next two months, we are going to be in Mexico. Then, we are going to go from Mexico to the mountains and spend a month there." Chris's Big Why keeps him motivated when he's lead generating, and now he's living his goals!



"The Big Why is everything."

KURT BUEHLER
THE BUEHLERS AND
ASSOCIATES
FLOWER MOUND, TEXAS

"Once you know what you want and why you're working, then the rest is easy. Then you just do a plan to go get it."

BOB ANDREWS
TEAM ANDREWS
CENTREVILLE, VIRGINIA

Exercise

It's About More than Paying the Bills!

Directions:

1. Take a few minutes to think about what a successful real estate career will do for you. How do you want to live? What do you want people to say about you? What matters most to you?
2. Write your Big Why in the space below.
3. Tear out this page. When you get back to your work space, put it in a place where it can remind you why it is so important that *you* develop the daily habit of 3 hours of lead generation.

Time: 10 minutes



**BIG
WHY**



The Models

The Millionaire Real Estate Agent (MREA) defines the models essential to business planning.

1. Economic Model
2. Lead Generation Model
3. Budget Model
4. Organizational Model

Model 1: Economic Model

The Economic Model connects the dots between a desired income goal and the fundamental activities that lead to it. It shows the power structure behind the number of appointments that you go on and your income goal.

We'll examine a simplified version of the Economic Model using some assumptions that will carry through to the other models:

1. Eighty percent of the listing appointments you go on will result in listing agreements, and 65 percent of your listing agreements will result in closed deals.
2. Sixty-five percent of buyer appointments will result in buyer agreements, and 80 percent of your buyer agreements will result in closed deals.
3. Average sales price of a home is \$250,000, and average commission per side is \$7,500.
4. We're splitting the business evenly between listings and buyers.

If you don't know your actual conversion rates, you can use these assumptions while creating your business plan. But you must start tracking your numbers now. Next year and thereafter, you'll plug in your actual numbers. See *Power Session 10: Lead Conversion* for more information on conversion rates.

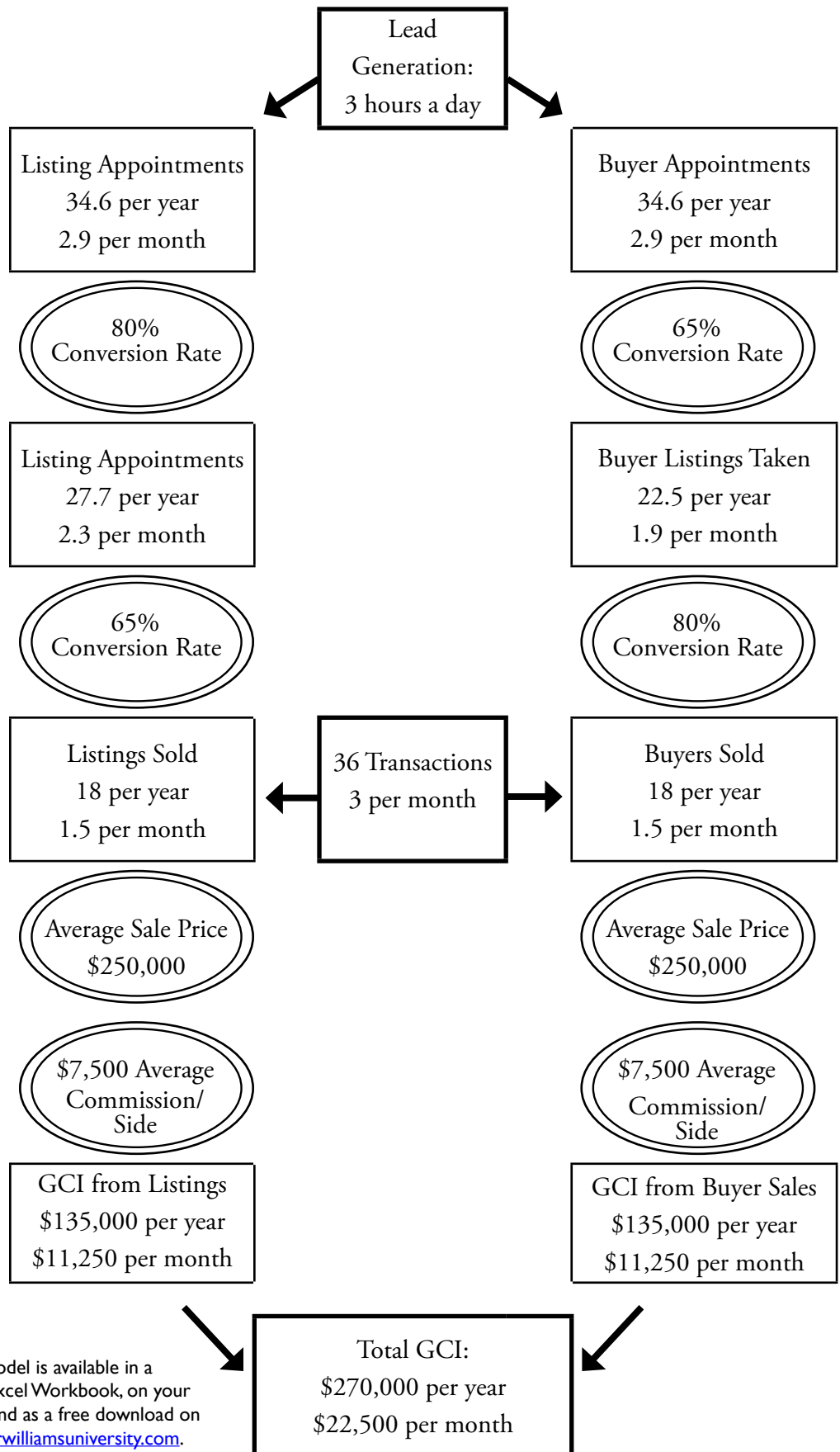
Smokey Garrett is a Team Leader and the owner of the top-producing Garrett and Nguyen Realty Group in Arlington, Texas. As a new agent, Smokey hated tracking his numbers, but he learned early the power of this knowledge. He explains:

"I found value in tracking my numbers after I saw the strength of what knowing the numbers brought. After my first year, I started keeping numbers on everything. It basically allowed me to predict and to duplicate on a very accurate basis absolutely every part of my business."



"Our business planning is simple. We just use the four fundamental models."

JANA CAUDILL
THE JANA CAUDILL TEAM
CROWN POINT, INDIANA



This model is available in a Microsoft Excel Workbook, on your Toolkit CD and as a free download on www.kellerwilliamsuniversity.com.

Look for 36-12-3 Business Planning.

Model 2: Lead Generation Model

To produce the appointments in the Economic Model, you must develop a lead generation plan.

What's the shortest path to profit?

To reap the greatest profits, your lead generation plan should be prospecting based and marketing enhanced.

Kurt Buehler, thriving agent with The Buehlers and Associates from Flower Mound, Texas, explains, "Newer agents typically have lots of time and very little money. So, what can you do with a lot of time and very little money? You can make phone calls and you can try to reach out." Chris Heller agrees that prospecting is a profitable lead generation choice. He says, "I can get better results and earn a higher profit by prospecting and earning the business than by trying to buy the business." You can too.

The Lead Generation conversion ratios are 12:2 for Mets and 50:1 for Haven't Mets. See *Power Session 4: Leveraging a Powerful Contact Database* and *Power Session 5: Working with Mets* for more information on these conversion ratios.

These ratios mean that to close 36 transactions, you must have in your database

- 216 Met contacts if you're only working with Mets.
- 1,800 Haven't Met contacts if you're only working with Haven't Mets.
- Some combination thereof.

Remember, these ratios are only achieved when your contacts have been consistently touched through marketing action plans.

In working through the Lead Generation Model, you'll determine how many people you need to add to your database to achieve your transactions goal. You'll also determine how much it will cost you to touch your database per year.

In working through our example, we'll assume

1. We want to split our business so that 75 percent of it comes from Mets and 25 percent of it comes from Haven't Mets.
2. We already have 100 contacts in our Met database.
3. All Mets will go through an initial 8 x 8 marketing plan, and will then be on an ongoing 33 Touch plan.

"When Gary Keller says that lead generation is prospecting based and marketing enhanced, he means it!"

DIANNA KOKOSZKA
PRESIDENT OF MAPS
KELLER WILLIAMS REALTY
INTL.
AUSTIN, TEXAS

Lead Generation Model		
	Met	Haven't Met
Business Ratio	12:2	50:1
Contact Numbers	% <u>75</u> of business x <u>36</u> transactions x 6 (12:2 ratio) = <u>162</u> in database	% <u>25</u> of business x <u>36</u> transactions x 50 (50:1 ratio) = <u>450</u> in database
Current Number in Database	- <u>100</u>	- <u>0</u>
Total Number to Add Right Away	= <u>62</u> ÷ <u>4</u> weeks = <u>15.5</u> contacts per week	= <u>450</u> ÷ <u>4</u> weeks = <u>112.5</u> contacts per week
Additional Contacts to Add	= <u>440</u> ÷ <u>11</u> months = 40 contacts per month ÷ <u>4</u> weeks = 10 contacts per week	
Touches	Initial 8 x 8 Yearly 33 Touch	Yearly 12 Direct
Cost	<u>502</u> new contacts x 8 initial touches <u>.50</u> cost per touch = <u>\$2,008</u> for 8 x 8 <u>602</u> total contacts x 33 touches per year x <u>.50</u> cost per touch = <u>\$9,933</u> for 33 Touch = <u>\$11,941</u> Met total cost	<u>450</u> total contacts x 12 touches per year x <u>.50</u> cost per touch = <u>\$2,700</u> Haven't Met total cost

This model is available as a Microsoft Excel Workbook on your Toolkit CD and as a free download on www.kellerwilliamsuniversity.com.

Look for 36-12-3 Business Planning.

Stomp on the Gas!

If you don't have the minimum number of contacts that you need in order to reach your transaction goal, plan to stomp on the gas. Try to add all of those contacts in the next month. You can do it by enacting what you've learned in the previous Power Sessions. Then plan to steadily add additional contacts throughout the year. Remember, your conversion rates might not be 12:2 and 50:1. Until you can accurately predict your conversion rate, you'll want to have an ample cushion of contacts. Since Mets are more cost-effective than Haven't Mets, it would be sensible to select Mets as the additional contacts.



Keep the Cost per Touch Low

You'll touch each of your Mets an initial 8 times and then 33 times per year, and you'll touch each of your Haven't Mets 12 times per year. So, to make the most profit, keep the cost per touch low. You can do this by selecting cheaper touches like prospecting phone calls, "pop bys," and emails. Don't limit costs by limiting touches.

Mary Charters, from Mary Charters and Associates in Gaithersburg, Maryland, became a top agent by selecting low-cost options when her lead generation budget was tight. She recalls:

"I did an open house every single weekend for five years. It was part of my routine. If I had buyers and sellers, they had to work around my open house schedule, because that is where I got new people before I had a big marketing budget to spend. I knocked on doors; I called all of my listings and sales. These are things anyone can do at any level at no expense whatsoever."



Mary even enlisted her family's help. "My husband and I, my two stepchildren, even my parents if they were in town, sat downstairs in front of the TV and literally stuck labels on 5,000 postcards. We did it all ourselves, and we got where we wanted to be."

"So many people start something and then just stop. Then, they think it didn't work."

DEBBIE ZOIS
DEBBIE ZOIS AND
ASSOCIATES
LAS VEGAS, NEVADA

Marketing

Dick Dillingham, a top agent from Plano, Texas and dean of Keller Williams University – Faculty, defines marketing as a technique to funnel people into your Mets database. (See *Power Session 3: Marketing* for more information on marketing tactics and options.) At this point in your career use marketing judiciously, since your focus is prospecting. Then monitor the return on your marketing investment every quarter to six months. Don't monitor the cost effectiveness of any particular marketing tactic more frequently than this. Doing so would be like checking your stock market portfolio daily. If you don't give it time, you might stop an activity that was about to break through!

Model 3: Budget Model

“Lead with revenue.”

GARY KELLER, DAVE JENKS,
AND JAY PAPASAN
*THE MILLIONAIRE REAL
ESTATE AGENT*

The Budget Model sets limits for spending money. A basic premise of the Budget Model is that you must make the money before you spend it. We call this “leading with revenue.”

It states that your biggest expenses fall into two broad categories:

1. Cost of sale – the money you spend to acquire your income. It includes compensation for Buyer or Seller Specialists and your Company Dollar and Royalty caps.
2. Expenses - what you spend on generating leads running your business. Expenses include the costs of your action plans and your rent.

Let’s examine a simplified version of the Budget Model that doesn’t include compensation for Buyer Specialists or Seller Specialists. When you’re ready to expand your team and make those hires, add those costs in as costs of sale. Without a Buyer or Seller Specialist, your only costs of sales will be your Company Dollar and Royalty cap amounts. These are your commission splits until you cap.

Gene Rivers is an OP of multiple Market Centers and a top agent with The Rivers Team in Tallahassee, Florida, so he works with agents regularly. One thing he tries to teach them is to cap as fast as they can. Capping is a good thing for profit sharing in the Market Center, he notes, but it is equally important for agents who want to succeed fast. “Once you cap,” he explains, “you now have an extra 30 percent to spend on marketing and promotion, so your lead generation and your career will really take off when you cap.” Capping in Gene’s north Florida market means selling about \$2.1 or \$2.2 million in real estate, which is the typical production level of the typical agent.



Discussion

The Race to Cap Is On!

Discuss the Company Dollar and Royalty cap amounts in your Market Center. What production level is required to cap? About how many deals is this based on with your market’s average sale price?

Time: 5 minutes

A simple way of viewing the Budget Model is 30-30-40. Broadly speaking, your cost of sales and expenses will each account for 30 percent of your revenue. That means you can bring 40 percent to the bottom line. How many business owners can talk about expecting a 40 percent net profit with a straight face? On your path to 36 sales, your cost of sales and expenses will very likely be far less than 30 percent!

Using the recommended percentages of Total GCI from *The Millionaire Real Estate Agent* and our numbers from our Economic Model example (which assumes a Total GCI of \$270,000), your operating expenses for the year would be

Operating Expenses		
	Percentage of Total GCI	Amount
Salaries	12%	\$32,400
Lead Generation	9.2%	\$24,840
Occupancy	2.0%	\$5,400
Technology	1.5%	\$4,050
Phone	1.0%	\$2,700
Supplies	1.0%	\$2,700
Education	1.0%	\$2,700
Equipment	1.0%	\$2,700
Auto/Insurance	0.5%	\$1,350
Total Expenses	29.2%	\$78,840

This model is available as a Microsoft Excel Workbook on your Toolkit CD and as a free download on www.kellerwilliamsuniversity.com. Look for 36-12-3 Business Planning.

Salaries

Salaries are a substantial chunk of the Budget Model, which is why you shouldn't add any hires until you have more business than you can handle by yourself. You might be there or close to it when you're closing 36 transactions a year. Think of your well-selected administrative hire as an investment. They should pay for themselves in multiples in the form of increased business by the end of their first or second year of hire. If they don't, you'll want to find someone who does.

Lead Generation

“If you go work out one morning, do you expect to see immediate results? Do you quit if you don’t? So, if you call one FSBO, and it doesn’t work out, are you going to give up?”

TERI BRENKUS
THE BRENKUS TEAM
LAS VEGAS, NEVADA

Lead generation is another substantial chunk. In our Lead Generation Model example, we found that we were going to spend \$14,641 on our Met and Haven’t Met database touches for the year. That amount is just a portion of the recommended lead generation budget. You can spend the rest of it on all of your other lead generation activities—like open house materials, marketing, etc. It’s a generous amount, though. Don’t feel like you have to spend all of it.

There are three important rules to remember about your additional lead generation activities:

1. Lead with revenue, which means you have to make money before you can spend it. Don’t put lead generation activities on your credit card because you don’t have the money to spend.
2. Don’t attempt more than three strategies. You want to master each strategy before determining whether or not it will work for you.
3. Hold the money that you spend accountable to a return. Make sure you are making a profit on what you spend. But, don’t evaluate the return too soon. Give it a quarter to six months.

Model 4: Organizational Model

No one succeeds alone. When you can no longer keep up with your prosperous business, you're ready to make your first hire. Examine your schedule and how you've organized your time critically, though, before you decide you're too busy. You should be able to achieve 36:12:3 without the help of a salaried assistant. One of the outcomes of achieving 36:12:3 will be that you've built a business that will soon require talented leverage, and you'll have the steady business to pay for it.

Scott Crouch, an OP at Phoenix Anthem in Arizona, has seen the struggle between an agent's schedule and their first hire. He says, "The reality can be that the agents are mismanaging their time. If you pull up their schedules, odds are they are not time blocking or staying focused on the key competencies of the business, which are prospecting, training, and coaching and consulting. If they are time blocking and stay focused, they are off to the races." When you consistently time block for lead generation and have more business than you can handle, then you will be ready to make your first hire.



Your First Hire

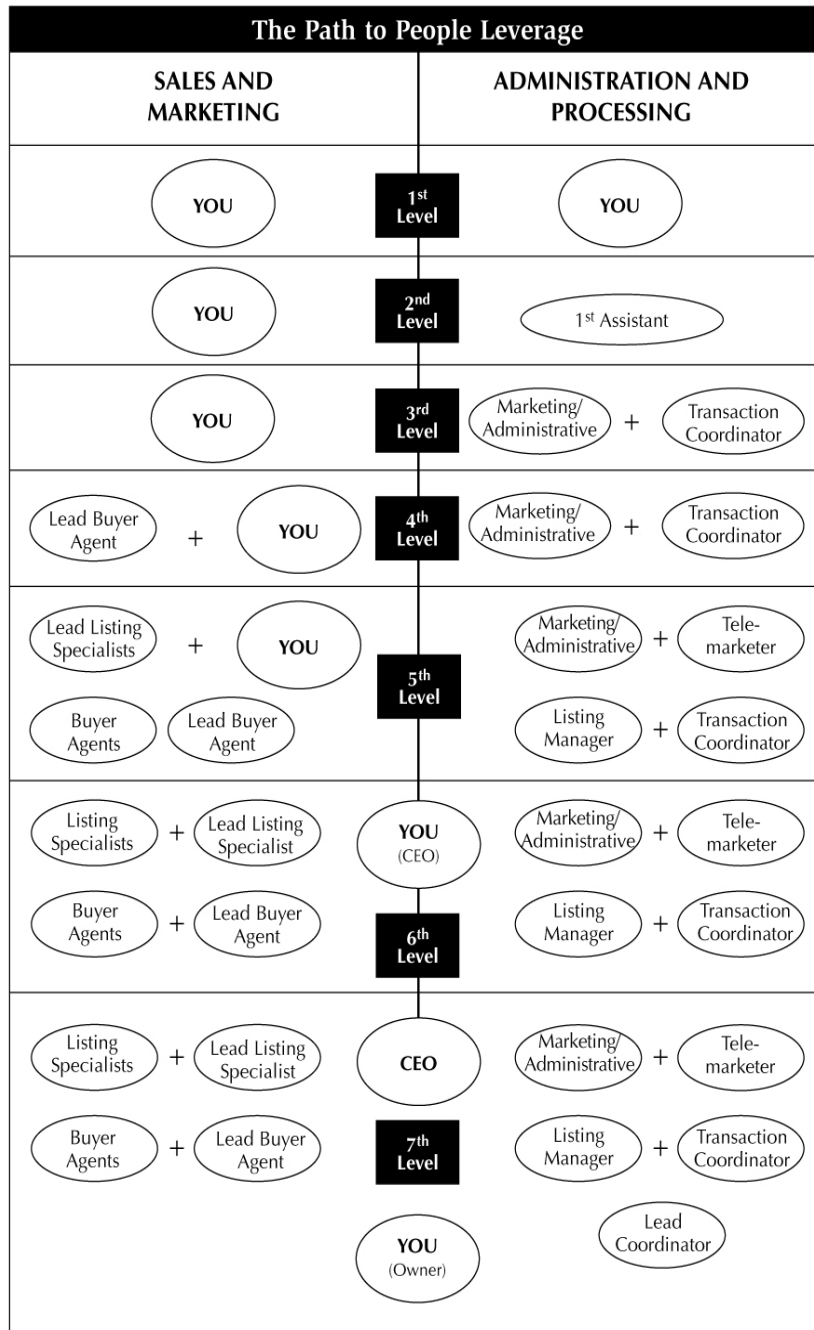
Depending on your personal production limits, your first, second, and possibly even your third hire will be talented administrative help. Select this person carefully and take your time, as he or she will be a big part of your business' growth trajectory. Eventually this person may be someone that you move into a team management position. Initially, however, this person must be capable of implementing the systems and tools that will take you to the next level.

Gary Keller's first hire to Keller Williams Realty in October 1983 was someone he selected very carefully, Sharon Gibbons. Sharon's position transformed from a bookkeeping role with Gary to the role of KW's very first MCA. She later went on to head the Finance Department at KWRI, and is presently the vice president of the MCA Division.



See the KWU course Recruit-Select for more information about recruiting and hiring talented help.

Ultimately, your goal is to have a successful business run by other people. This is what we call a 7th Level business.



Pulling the Models Together

Let's pull the models together to see the Big Goals for the year.

The Year's Big Goals	
\$163,160	Net Income (Before Taxes)
\$25,000 + \$3,000	+ Company Dollar and Royalty Caps (Cost of Sales)
\$32,400	+ Salaries (Operating Expense) list any organizational hires. 1 great administrative assistant
\$24,840	+ Lead Generation (Operating Expense) include touches for Mets and Haven't Mets, plus marketing expenses <div style="text-align: center;"> <p>Mets (75%)</p> <p>Haven't Mets (25%)</p> <p>= \$11,941 total cost</p> <p>= \$2,700 total cost</p> <p>502 contacts to add/year</p> <p>450 contacts to add/year</p> <p>Lead Generation Budget</p> <p>How are you going to spend your budget? What will your touches contain? What tactics will you initiate? How long will you let them run before you hold them accountable to profitability? List your campaigns, how much you'll spend on them, and when you'll hold them accountable to profitability.</p> </div>
\$21,600	+ Other Operating Expenses
\$270,000	= Your Gross Commission Income

This model is available as a Microsoft Excel Workbook on your Toolkit CD and as a free download on www.kellerwilliamsuniversity.com.

Look for 36-12-3 Business Planning.

50%	x	% of Business from Listings	50%	x	% of Business from Buyers
\$135,000	=	GCI from Sellers	\$135,000	=	GCI from Buyers
\$7,500	÷	Your Avg. Commission	\$7,500	÷	Your Avg. Commission
18	=	Seller Transactions	18	=	Buyer Transactions
65%	÷	Seller Transaction Conv. %	80%	÷	Buyer Transaction Conv. %
27.7	=	Seller Listings Taken	22.5	=	Buyer Listings Taken
80%	÷	Seller Appt. Conv. %	65%	÷	Buyer Appt. Conv. %
34.6	=	Seller Listings Appts.	34.6	=	Buyer Listings Appts.
12	÷	months/year	12	÷	months/year
2.9	=	Seller Listings Appts./mo	2.9	=	Buyer Listings Appts./mo
3 Hours of Lead Generation / Workday					

In our example, to hit 36 transactions, you need only achieve 2.9 seller listing appointments and 2.9 buyer listing appointments per month. (Let's round that number to 3 for the sake of practicality.)

Have you ever been on a seller or buyer listing appointment? Excellent! You are an achiever! Now just do that 3 times a month for each type of appointment. Or why not aim higher? With the techniques you've learned in the previous Power Sessions, you're ready to put the pedal to the metal and live your goals!

Exercise

Give Yourself a Raise!

Directions:

1. List three numbers that you could change that would ultimately increase your net income. Think about how you could make that change.

2. At your instructor's direction, jump up and write one of your answers on the flip board.

Time: 10 minutes

“It doesn't take that many phone calls per day to build a hugely successful business. People say, ‘I can't make \$500,000 this year,’ but you can.”

SMOKEY GARRETT
DFW METRO SOUTH
ARLINGTON, TEXAS

Notes

Goals-to-Actions

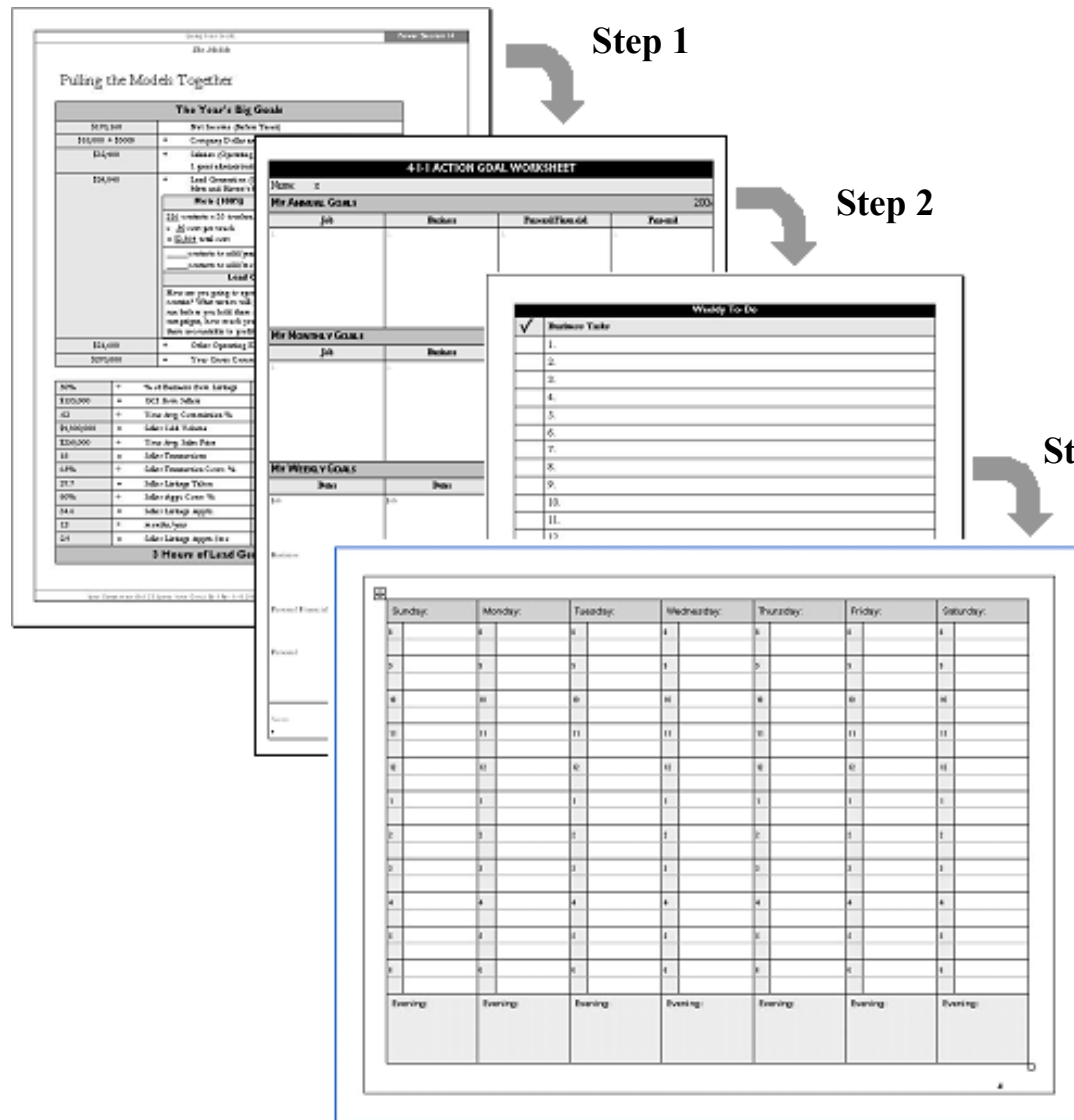
We've defined our yearly goals using the four models, and worked our numbers down to the number of appointments we will make per month.

In three steps we can turn those goals into specific actions:

- **Step 1:** Add the Big Goals from our business planning to the yearly, monthly, and weekly goals of the 4-1-1. We'll stay accountable to these goals throughout the year!
- **Step 2:** Specify weekly actions on Weekly To-Do Lists.
- **Step 3:** Time block to ensure that the actions happen, which means *we reach our goals!*

“Put your foot on the lead generation pedal and tie it there!”

GARY KELLER
COFOUNDER AND
CHAIRMAN OF THE BOARD
KELLER WILLIAMS REALTY
INTL.
AUSTIN, TEXAS



Step 1: Adding Goals to the 4-1-1

“When you set goals, something inside you starts saying, ‘Let’s go, let’s go’ ...”

ZIG ZIGLAR
AUTHOR AND SPEAKER

The image shows a software interface with two main components. On the left is a window titled "Pulling the Models Together" which displays "The Year's Big Goals" as a list of financial targets and percentages. On the right is a "4-1-1 ACTION GOAL WORKSHEET" which is a grid for tracking goals over time.

Amount	Goal Description
\$10,000	Start Business (Personal Finance)
\$10,000 + 100%	Complete 100% of...
\$11,000	Business (Opening a new business)
\$12,000	Start Personal Life (Write and Publish a Book)
\$13,000	Start Personal Life (Write and Publish a Book)
\$14,000	Start Personal Life (Write and Publish a Book)
\$15,000	Start Personal Life (Write and Publish a Book)
\$16,000	Start Personal Life (Write and Publish a Book)
\$17,000	Start Personal Life (Write and Publish a Book)
\$18,000	Start Personal Life (Write and Publish a Book)
\$19,000	Start Personal Life (Write and Publish a Book)
\$20,000	Start Personal Life (Write and Publish a Book)

4-1-1 ACTION GOAL WORKSHEET				
Name: _____				
My ANNUAL GOALS				2009
Job	Business	Personal Finance	Personal	
My MONTHLY GOALS				Month etc.
Job	Business	Personal Finance	Personal	
My WEEKLY GOALS				
Date	Date	Date	Date	
Job	Job	Job	Job	
Business	Business	Business	Business	
Personal Finance	Personal Finance	Personal Finance	Personal Finance	
Personal	Personal	Personal	Personal	

The 4-1-1 Action Goal Worksheet is formatted to guide an individual through goal setting for 1 year, 1 month, and 4 weeks in the categories of Job, Business, Personal Finance, and Personal life.

On the following page we'll add our business planning goals to the business category for the year, then we'll break those Big Goals into monthly and weekly goals.

Instructor

Note: You could use the job category to detail education goals. List the topics you want to master as your yearly goals, and then break those goals down into the courses that you will attend on a monthly and weekly basis.

4-1-1 ACTION GOAL WORKSHEET

Name:

MY ANNUAL GOALS

YEAR OF XXXX

Job	Business	Personal Financial	Personal
1) 2) Record your personal annual Big Rock goals for your job here.	1) <u>3 hours of lead generation per workday.</u> 2) \$163,160 net income and \$270,000 GCI 3) Hold lead generation budget to \$24,840. 4) Add 502 Mets and 450 Haven't Mets to database. 5) Hold operating expenses to \$21,600. 6) <u>Close 36 transactions.</u> 7) Go on 35 listing appointments and 35 buyer listing appointments. 8) Hold investment in radio spot accountable to a return of 2 deals by May.	1) 2) Record your personal financial goals here.	1) 2) This includes but is not limited to your annual personal education goals here.

MY MONTHLY GOALS

MONTH OF JAN

Job	Business	Personal Financial	Personal
1) 2) Record your personal monthly goals and actions for your job here.	1) <u>3 hours of lead generation per workday.</u> 2) Hold expenses to yearly budget. 3) Add 62 Mets and 450 Haven't Mets. (Ramping Up) 4) <u>Close 3 transactions.</u> 5) Go on 3 listing appointments and 3 buyer listing appointments.	1) 2) Record what you will do each month for your personal finances.	1) 2) This includes but is not limited to your monthly personal education goals and actions. Plan well. You want to burn up, not burn out!

MY WEEKLY GOALS

Dates	Dates	Dates	Dates
Job 1) Business 1) <u>3 hours of lead generation per workday.</u> 2) Hold expenses to budget. 3) Add 16 Mets. 4) Add 150 Haven't Mets. 5) <u>Go on 1 listing appointment.</u> This worksheet is available as a Microsoft Word Document on your Toolkit CD and as a free download on www.kellerwilliamsuniversity.com . Look for 36-12-3 4-1-1.	Job 1) Business 1) <u>3 hours of lead generation per workday.</u> 2) Hold expenses to budget. 3) Add 16 Mets. 4) Add 100 Haven't Mets. 5) <u>Close 1 transaction.</u> 6) Go on 1 listing appointment. 7) Go on 1 buyer appointment.	Job 1) Business 1) <u>3 hours of lead generation per workday.</u> 2) Hold expenses to budget. 3) Add 15 Mets. 4) Add 100 Haven't Mets. 5) <u>Close 1 transaction.</u> 6) Go on 1 listing appointment. 7) Go on 1 buyer appointment.	Job 1) Business 1) <u>3 hours of lead generation per workday.</u> 2) Hold expenses to budget. 3) Add 15 Mets. 4) Add 100 Haven't Mets. 5) <u>Close 1 transaction.</u> Personal Financial 1) Personal

“Like anything in business, you actually do what you measure. If you measure the right activities, you get the desired outputs.”

BRAD PUFFER
THE PUFFER TEAM
ASHEVILLE, NORTH
CAROLINA

Where are the phone calls, events, open houses, etc?



You can add your lead generation activities as actions on your to-do list in the next step, but don't add them as goals on your 4-1-1 now. When you've tracked your numbers for six months to a year, you'll know how many activities it takes for you to get results. When you're there, you can add that activity and your goal number to your 4-1-1.

After his first year in business, Smokey Garrett started tracking his numbers. He found that doing so gave him the tools to make powerful predictions about his business. He explains: “Back then I found that for every 12 cold calls, I got a lead. For every 5 leads that I got, it turned into at least 1 appointment. And for every 3 appointments that I went on in the beginning, I got 1 listing. At that time, the listing numbers were 50 percent of the sale ratio. So then I knew the big number.” When you've tracked your numbers like Smokey and you know them well enough to accurately predict your annual GCI, you can add specific activities to your 4-1-1.

How many calls, events, open houses, etc., should I do?

As many as it takes. Lead generate for 3 hours every workday.

At this point, you're accountable to the daily habit of 3 hours of lead generation per workday. The results will be the appointments, the contracts, and the closed deals. Courtney Yates, successful agent with Team Yates from Murfreesboro, Tennessee, sums it up with, “If you don't prospect, you're not going to get there.” But you, you're going to get there!

How do I get there?

The daily habit of 3 hours.

Staying accountable to your 4-1-1 goals

Accountability is, in the KW experience, the most crucial part of goal achievement. When a person takes the time to report to someone else how and what they did in moving toward their goals, it lends even more focus and motivation to their activities.

Look to the following to find an accountability partner:

- KW MAPS Institute
- Market Center Productivity Coach
- Team Leader
- Assistant Team Leader
- ALC Members
- Peers

Then, get into a regular accountability schedule with your partner. Ideally, you will meet for weekly, thirty-minute scheduled sessions. In these meetings, you will go through your 4-1-1 and account for which goals you met and what kept you from meeting goals you missed. These sessions are not about blame; they are about getting on and staying on the achievement track.

Nikki Ubaldini, Regional OP at Florida-South, OP of multiple Market Centers, and top agent with the Gary and Nikki Team from Clearwater, Florida, has found that accountability sessions are a positive instrument in propelling success. The effect of accountability, she says, is that “agents come in, and they drive themselves.”



If you miss a goal

If you miss a goal, don't waste time beating yourself up. Instead, take action to get back on track!

1. Examine why you missed the goal. Was the goal itself unrealistic? Did something unexpected happen that caused you to lose focus?
2. Develop a new plan for meeting the goal. Could you improve your skills or change your tactics?



Take a look at where you actually are. Even though you missed the goal, are you still on the board? Are you doing better than you would have without your goal? Gary Keller points out that everybody gets knocked down sooner or later—that's not the issue. "The issue," he says, "is do you know how to get back up?" If you keep going back to the daily habit of 3 hours, then yes, you do know.

Kurt Buehler, top-producing agent with The Buehlers and Associates from Flower Mound, Texas, learned how to sensibly manage goals from one of his coaches, Dave Jenks, the vice president of Research and Development at KWRI.

Kurt says that when they first got into a relationship, Dave held him to a high level of accountability, and Kurt learned to gauge himself on a daily and weekly basis, instead of a monthly basis. For example, Kurt says that if he waited until the third week of the month to examine where he was, he could find that he was "behind the eight ball and it was too late to correct a problem."

At the same time, though, Dave helped him to realize that if he didn't hit a monthly goal, it was still just a monthly goal. "So, brush yourself off," Kurt recalls Dave saying. "Figure out what you did wrong, then come back and fix it."



Step 2: Specify Actions on the Weekly To-Do List

4-1-1 ACTION GOAL WORKSHEET

Name: x

MY ANNUAL GOALS 200x

Job	Business	Personal/Financial	Personal

MY MONTHLY GOALS Month of: x

Job	Business	Personal/Financial	Personal

MY WEEKLY GOALS

Date	Job	Business	Personal/Financial	Personal

Weekly To-Do

Business Tasks
1.
2.
3.
4.
5.
6.
7.
8.
9.
10.
11.
12.
13.
14.
15.
16.
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23.
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26.
27.
28.
29.
30.

*“The transactions
don’t happen
without actions.”*

MIKE MENDOZA
THE MIKE MENDOZA TEAM
PHOENIX, ARIZONA


Once you’ve clarified your goals, specify the actions you will take to meet those goals on the Weekly To-Do List. As Dianna Kokoszka, vice president of the MAPS Institute, says, “All real estate is *is taking action.*”

The actions you specify will depend on the lead generation activities you are undertaking. Think about everything you’ve learned in the previous sessions. If you’re going to Metwork, your actions might involve calling acquaintances from your book club and writing personal follow-up notes. If you’re interested in farming, your actions might involve attending a home owner’s association meeting, following up with phone calls to contacts from the meeting, and visits with community members.

Keep in mind that the actions you specify can complement each other. For example, activities for working open houses could easily cross over with marketing or farming or Metworking!

On the following page, we’ll list activities for the week that will enable us to meet our weekly 4-1-1 goals. In our example, we’ll use Metworking and geographic farming techniques.

Weekly To-Do

	Business Tasks
	1. Attend a local school board meeting.
	2. Put contacts from meeting in database and on 8 x 8.
	3. Meet community merchants in person.
	4. Put merchants in database and on 8 x 8.
	5. Drop off market statistics information to merchants.
	6. Talk to Loan Officer about cohosting a seminar on financial advice through the PTO. Can offer real estate portfolio advice.
	7. Attend PTO meeting.
	8. Talk to PTO chairperson about financial advice seminar.
	9. Call acquaintances from PTO and request business or referrals.
	10. Put acquaintances in database and on 8 x 8.
	11. Write personal follow-up letters to acquaintances from PTO.
	12. Call past clients and request business or referrals.
	13. Walk around neighborhood and knock on doors. Request input for HOA meeting.
	14. Attend HOA meeting.
	15. Put contacts from HOA meeting on 8 x 8.
	16. Call neighborhood contacts with HOA follow-up.
	17.
	18.
	19.
	20.

This worksheet is available as a
Microsoft Word Document on your Toolkit CD and as a free download on www.kellerwilliamsuniversity.com.

Look for 36-12-3 Weekly To-Do.

Step 3: Time Block

Time blocking is how you plan for focus. It's a simple, yet powerful technique.

Steps to Time Blocking

1. Get out your calendar. It doesn't matter if it's a paper calendar or if it's your Microsoft Outlook calendar.
2. Schedule all of your play time first. Do you want to go on vacation to see the fall foliage in New England in October? Great, schedule it in. Is your son on the football team? Wonderful. Find out when those games are and put them on your schedule.
3. Schedule your pay time next. This is where you commit to the daily habit of 3. ***Every single workday should have this time block on it, preferably in the morning.*** Your commitment to this one habit will determine whether or not you hit your goals.

The anatomy of this time will vary, depending on which lead generation techniques you select. Your 3 hours may include

- Preparation activities, like practicing scripts
- Action items, like calling FSBOs
- Maintenance activities, like adding contacts to your database

To make sure that you've got time allotted for each activity on your Weekly To-Do List, just write "Lead Generation" across the first 3 hours of every workday. Then stick to your schedule.

If you have activities that must occur outside of your standard lead generation time block, like evening PTO meetings, add those to your calendar as well.

Weekly To-Do

<input checked="" type="checkbox"/>	Business To-Do
<input type="checkbox"/>	1
<input type="checkbox"/>	2
<input type="checkbox"/>	3
<input type="checkbox"/>	4
<input type="checkbox"/>	5
<input type="checkbox"/>	6
<input type="checkbox"/>	7
<input type="checkbox"/>	8

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
9							
10							
11							
12							
1							
2							
3							
4							
5							
6							
7							
8							
Evening:	Evening:	Evening:	Evening:	Evening:	Evening:	Evening:	Evening:

[Lead Generation]

“Say Yes to your ability and No to distractions.”

GARY KELLER
COFOUNDER AND
CHAIRMAN OF THE BOARD
KELLER WILLIAMS REALTY
INTL.
AUSTIN, TEXAS

It doesn't matter which lead generation technique you want to try on a particular day. It does matter that you practice lead generation every single workday.

Keeping this focus every workday makes reaching your yearly goals possible. It makes achieving your Big Why a reality.

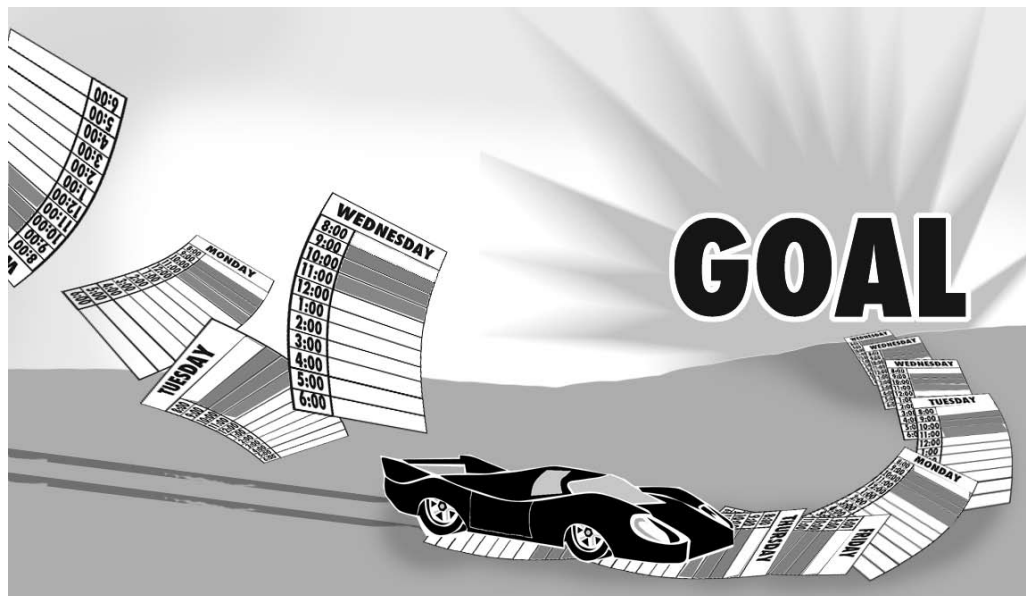
ONE HABIT

**... FOR 3 HOURS EVERY
WORKDAY.**

Am I really going to do this?

Look back to your Big Why and tell yourself, "Yes." You're not hoping that it happens; you're planning for it.

4. Schedule your scheduling time:
 - Block off a day in October for creating your next year's business planning.
 - Block off an hour every month for creating your monthly 4-1-1 goals.
 - Block off thirty minutes per week for creating your weekly 4-1-1 goals and another thirty minutes per week for your accountability sessions.
5. If you have to erase any time block, whether it's play, pay, or scheduling, replace it with another time slot!



Measuring Your Results

Focusing your effort on activities that yield results will amplify your income and establish a career worth having. How do you know which activities yield results? By tracking your numbers! All of them. Consistently. To make effective business decisions, you've simply got to know your numbers on a daily, weekly, monthly, and yearly basis.

Which Numbers?

You'll know where you should focus your effort, when you know

- how many phone calls you've made
- who the phone calls were to
- which marketing action plans have been applied to which contacts
- how many appointments you've been on
- how many contracts you've taken
- how many deals you've closed
- exactly where your business is coming from
- exactly what your expenditures are
- exactly what your return on investment is
- what your conversion rates are
- where you stand in meeting your goals

If you track every element of your business, *in time* you'll be able to precisely predict what you have to do to meet a specific goal.

Bob Andrews, a top agent with Team Andrews from Centreville, Virginia, says that tracking his business gave him the power to plan.

He explains, "I can tell you exactly how many people I need to talk to in order to get a lead, how many leads I need to get an appointment, and how many appointments I need to get a sale. Knowing this, I set a goal every week of how many people I want to talk to based on what my income goals are."



"You have to stay focused and consistent over a period of time for the results to come in. Track every result to know what worked and then stay focused on that."

BRAD MCKISSACK
MCKISSACK REALTY GROUP
DENTON, TEXAS

Tracking all of your results will give you the power to plan too. You'll know what works for you and how to maximize your profit potential. If you miss a goal, you'll know what adjustments you need to make.

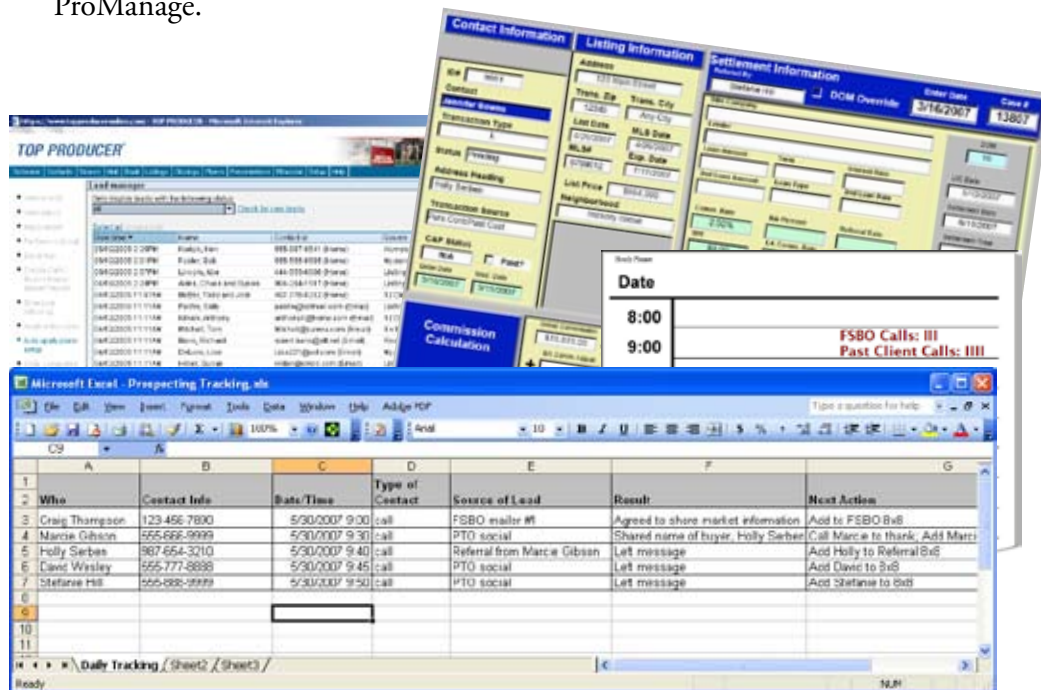
For now, try different lead generation techniques. You don't yet know your potential in every arena. FSBOs could be your undiscovered goldmine. Farming could be the niche that fits you best. By giving different techniques time and by tracking *everything*, you'll eventually know where your effort meets the greatest financial rewards.

“Nothing helps you focus on tracking your numbers like a coach.”

MARY TENNANT
PRESIDENT AND COO
KELLER WILLIAMS REALTY
INTL.
AUSTIN, TEXAS

Tracking Tools

Use any tracking tool you like as long as you can easily pull information from it. Bob Andrews tracks his numbers by making hash marks on a daily planner. He denotes the number and category of every contact. You can manually track your data, or you can select an electronic solution, like Microsoft Excel, 360Agent, Lotus Approach, or TOP PRODUCER, a tool in the suite of KWRI Agent Services called ProManage.

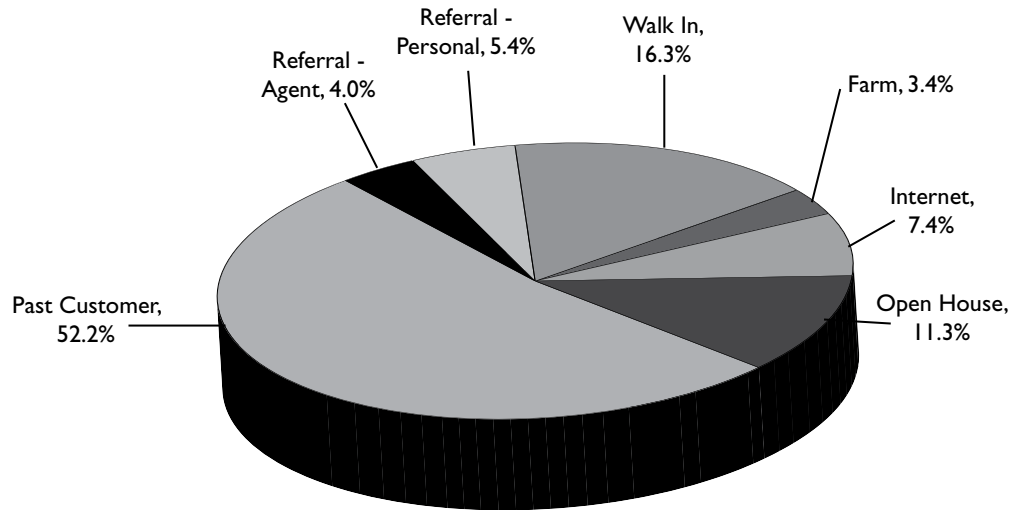


The tool you select should work in conjunction with your contact management system. See *Power Session 4: Leveraging a Powerful Contact Database* for more information on selecting a contact management system. TOP PRODUCER is an excellent choice as it combines a powerful contact management and tracking system, plus automated lead management tools.

Business Decisions

Measuring your results enables you to make astute, evidence-based business decisions.

In Kurt Buehler’s Listings Summary report he can see his listing numbers from 2002 to current. Tracking these numbers gives him the power to project what his business, and his income, will be for the upcoming year.



Mary Charters’ Transactions Source Report allows her to visualize where her business is coming from. Tracking her numbers allows her to pinpoint where she should focus her lead generation activity.

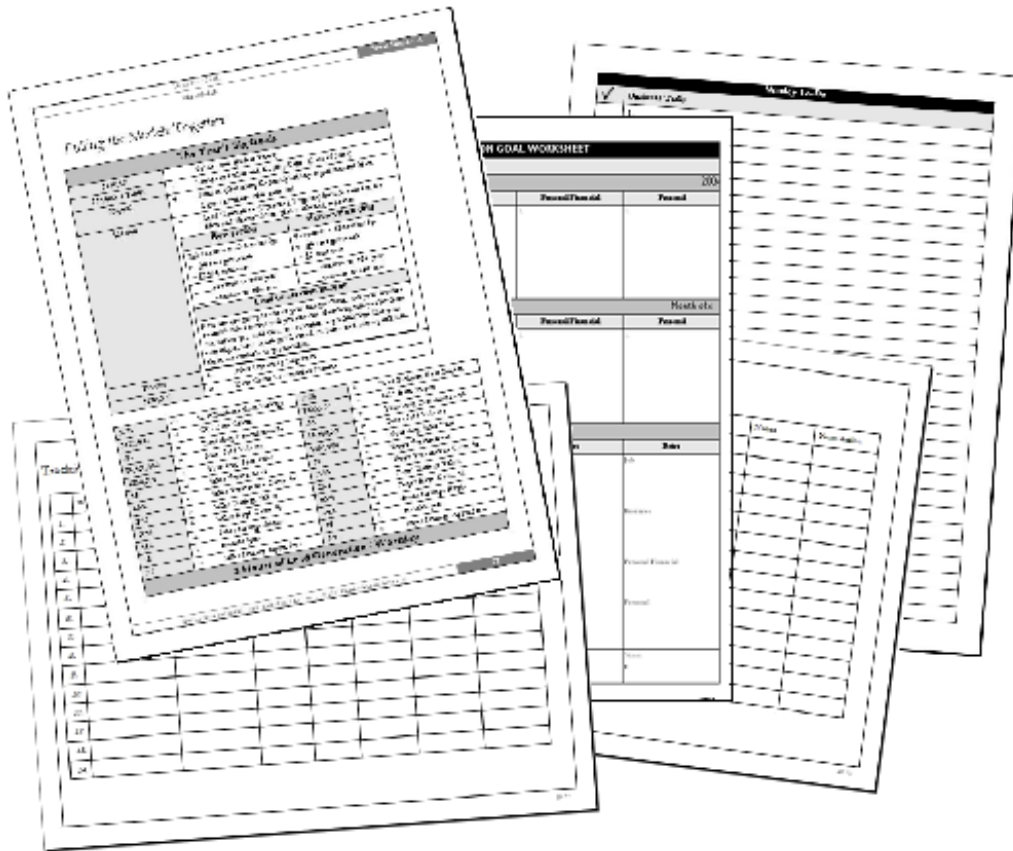


On KWConnect, view Session 4 of the Business Planning course (12:51 minutes) for a panel discussion on how top agents use their business plans.

Notes

Now, You Do It!

Get out your calculators! Your cell phone probably has one in its tools area, if you don't have one handy. Alternately, use the *36-12-3 Business Planning* Microsoft Excel workbook on your Toolkit CD. We'll work through the four models using your data, combine them, create your 4-1-1, develop a Weekly To-Do List and look at examples of sheets that you can use to track your results.



Exercise

Create Your Business Plan

Directions:

1. Work through the following pages to create your business plan for this year.
2. Your instructor will direct you as you move through the models.

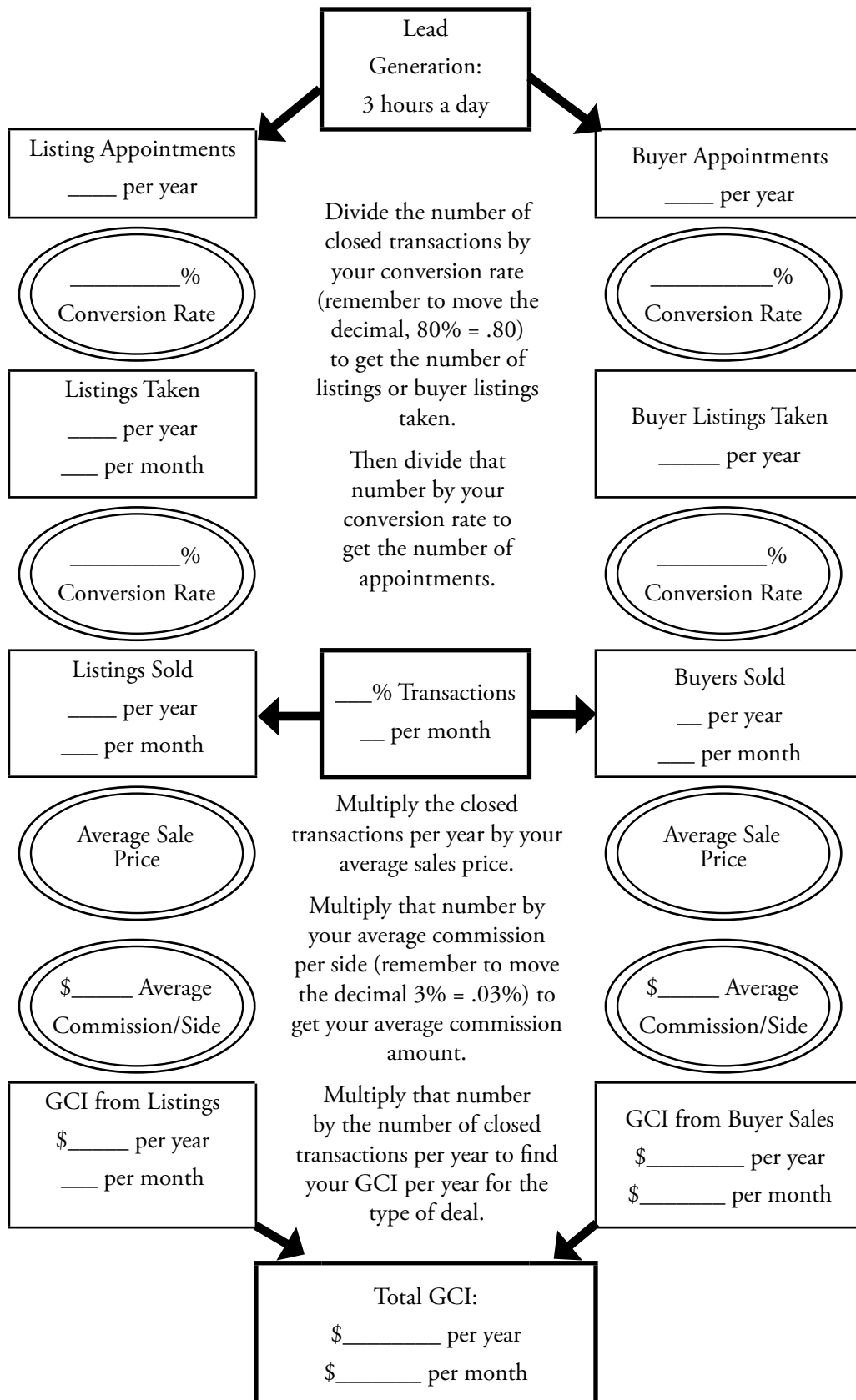
Time: 40 minutes

Notes

Business Plan:

Name: _____

Model 1: Economic Model



Model 2: Lead Generation Model

Lead Generation Model		
	Met	Haven't Met
Business Ratio	12:2	50:1
Contact Numbers	% ____ of business x ____ total yearly transactions x 6 (12:2 ratio) = ____ in database	% ____ of business x ____ total yearly transactions x 50 (50:1 ratio) = ____ in database
Current Number in Database	- _____	- _____
Total Number to Add Right Away	= ____ ÷ ____ weeks = ____ contacts per week	= ____ ÷ ____ weeks = ____ contacts per week
Additional Contacts to Add	= ____ ÷ ____ months = ____ contacts per month ÷ 4 weeks = ____ contacts per week	= ____ ÷ ____ months = ____ contacts per month ÷ 4 weeks = ____ contacts per week
Touches	Initial 8 x 8 Yearly 33 Touch	Yearly 12 Direct
Cost	____ new contacts x 8 initial touches ____ cost per touch = ____ for 8 x 8 ____ total contacts x 33 touches per year x ____ cost per touch = \$____ for 33 Touch = ____ Met total cost	____ total contacts x 12 touches per year x ____ cost per touch = ____ Haven't Met total cost

Model 2: Lead Generation Model, cont.

Lead Generation Model			
Lead Generation Strategy	Cost	Start Date	Accountable Date
1.			
2.			
3.			
Total:	\$		

Model 3: Budget Model

Cost of Sales	
Company Dollar Cap	\$ _____
Royalty Cap	+ \$ _____
Total	= \$ _____

Operating Expenses		
Total GCI = _____	Percentage of Total GCI	Amount
Salaries	12%	
Lead Generation	9.2%	
Occupancy	2.0%	
Technology	1.5%	
Phone	1.0%	
Supplies	1.0%	
Education	1.0%	
Equipment	1.0%	
Auto/Insurance	0.5%	
Total Expenses	29.2%	

Model 4: Organizational Model

New Hires				
Hire	Anticipated Salary	Salary as a Percentage of Total GCI	Anticipated Hire Date	Expectations for Role
I				
Total		12%		

Pulling the Models Together

The Year's Big Goals							
\$	Net Income (Before Taxes)						
\$ + \$	+ Company Dollar and Royalty Caps (Cost of Sales)						
\$	+ Salaries (Operating Expense) list any organizational hires.						
\$	+ Lead Generation (Operating Expense) include touches for Mets and Haven't Mets, plus marketing expenses						
	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #cccccc;"> <th style="width: 50%;">Mets (____%)</th> <th style="width: 50%;">Haven't Mets (____%)</th> </tr> </thead> <tbody> <tr> <td>= \$ _____ total cost</td> <td>= \$ _____ total cost</td> </tr> <tr> <td>_____ contacts to add/year</td> <td>_____ contacts to add/year</td> </tr> </tbody> </table>	Mets (____%)	Haven't Mets (____%)	= \$ _____ total cost	= \$ _____ total cost	_____ contacts to add/year	_____ contacts to add/year
	Mets (____%)	Haven't Mets (____%)					
	= \$ _____ total cost	= \$ _____ total cost					
	_____ contacts to add/year	_____ contacts to add/year					
	Lead Generation Budget						
\$	+ Other Operating Expenses						
\$	= Your Gross Commission Income						

%	x	% of Business from Listings	%	x	% of Business from Buyers
\$	=	GCI from Sellers	\$	=	GCI from Buyers
\$	÷	Your Avg. Commission	\$	÷	Your Avg. Commission
	=	Seller Transactions		=	Buyer Transactions
%	÷	Seller Transaction Conv. %	%	÷	Buyer Transaction Conv. %
	=	Seller Listings Taken		=	Buyer Listings Taken
%	÷	Seller Appt. Conv. %	%	÷	Buyer Appt. Conv. %
	=	Seller Listings Appts.		=	Buyer Listings Appts.
12	÷	months/year	12	÷	months/year
	=	Seller Listings Appts./mo		=	Buyer Listings Appts./mo

3 Hours of Lead Generation / Workday

4-I-I ACTION GOAL WORKSHEET

Name: _____

MY ANNUAL GOALS YEAR OF _____

Job	Business	Personal Financial	Personal
1)	1)	1)	1)
2)	2)	2)	2)
3)	3)	3)	3)
4)	4)	4)	4)
5)	5)	5)	5)

MY MONTHLY GOALS MONTH OF _____

Job	Business	Personal Financial	Personal
1)	1)	1)	1)
2)	2)	2)	2)
3)	3)	3)	3)
4)	4)	4)	4)
5)	5)	5)	5)

MY WEEKLY GOALS

Dates	Dates	Dates	Dates
Job	Job	Job	Job
1)	1)	1)	1)
2)	2)	2)	2)
3)	3)	3)	3)
4)	4)	4)	4)
5)	5)	5)	5)
Business	Business	Business	Business
1)	1)	1)	1)
2)	2)	2)	2)
3)	3)	3)	3)
4)	4)	4)	4)
5)	5)	5)	5)
6)	6)	6)	6)
Personal Financial	Personal Financial	Personal Financial	Personal Financial
1)	1)	1)	1)
2)	2)	2)	2)
3)	3)	3)	3)
4)	4)	4)	4)
5)	5)	5)	5)
Personal	Personal	Personal	Personal
1)	1)	1)	1)
2)	2)	2)	2)
3)	3)	3)	3)
4)	4)	4)	4)
5)	5)	5)	5)

Weekly To-Do

✓	Business Tasks
	1.
	2.
	3.
	4.
	5.
	6.
	7.
	8.
	9.
	10.
	11.
	12.
	13.
	14.
	15.
	16.
	17.
	18.
	19.
	20.

Tracking Leads

	Who	Contact Info	Date/ Time	Type of Contact	Source of Lead	Result	Next Action
1.							
2.							
3.							
4.							
5.							
6.							
7.							
8.							
9.							
10.							
11.							
12.							
13.							
14.							

Tracking Appointments

	Who	What	Date/ Time of Appt.	Source of Lead	Result	Notes	Next Action
1.							
2.							
3.							
4.							
5.							
6.							
7.							
8.							
9.							
10.							
11.							
12.							
13.							
14.							

Keep Your Goals in Front of Your Eyes

To achieve your goals, you must stay focused on them. Maintain that focus by keeping your goals in front of your eyes.

Top agent Mary Charters recalls that her husband helped her stay focused, which helped her attain success. “Every year my husband gave me four postcards with my goals written on them. I had one on my bathroom mirror, one on the door to the laundry room, one on my computer, and one on the dashboard of my car. It did not matter where I was, I saw my goals every day.”

You have the capacity to live your goals. You can experience your Big Why. To get there, keep your goals in front of your eyes, develop the discipline of lead generation, and adopt the habit of 3 hours of lead generation a day.

The Power of One and 36:12:3



Keep your foot on the gas! “You’re a Ferrari. Are you ready to go 200 mph? Are *you?*”

Notes

Putting It All Together

Power Session Aha's

Your Lead Generation Action Plan

Your success in the discipline of lead generation is dependent on your daily habit of action. By focusing your actions, you will propel yourself forward to 36 transactions or more per year.

Use the Action Planning Worksheet on the following page to record numbers from both your current lead generation program and your future goals. Then determine what actions you will take to “close the gap” between your current state and your goals.

These are your focused actions. When specifying them, consider:

- Adopting lead generation activities that complement each other and suit your behavioral style and interests.
- Mastering at least three reliable lead generation activities up front that you will be able to rely on in your business.
- Tracking your results with each activity and continuing to add new activities over time.
- Getting a coach as soon as possible in order to stay focused.

Note next to each activity how often you will conduct it—is it daily, weekly, or monthly?

Lead Generation Action Planning Worksheet

	Current as of _____	Goal by _____	Activities to “Close the Gap”
Annual GCI:			
Annual Closed Transactions:			
Annual Transactions from _____ (lead generation source)			
Annual Transactions from _____ (lead generation source)			
# of Mets in Database:			
# of Mets Added to Database (daily):			
# of Haven’t Mets in Database:			
# of Accountability Sessions:			
I know what my Big Why is.			
My business plan is complete.			
My goals are posted where I can see them.			

The 3-Hour Habit

The Power of One

**Focus on just one thing—lead generation
Develop one habit—3 hours of lead generation every
single workday.**

Of the activities listed on your Lead Generation Action Planning Worksheet, which will you add to your calendar for this week?

By adding items to your calendar, you are time blocking. Time blocking means that you always know what your most important job is every day and that you commit to getting it done. It means that you are going to do what you must do—generate leads. You're going to call and meet people, prepare marketing materials, network, host open houses, and prepare seminars. And it means that whichever of these actions you decide to focus your efforts on, you are going to get really good at them over time.

There are just three simple rules you must follow to put the powerful daily habit to work for you. But beware that these must be adhered to and not taken lightly.

1. Time block 3 hours every workday before noon.
2. No skipping. If you must erase, then you must replace.
3. Allow no interruptions (unless they truly are emergencies).

Time on the task beats talent every time.

And when you follow these three rules, you're making sure you put in the right amount of time on the right task.

Use the calendar on the following page to time block your lead generation activities. What did you learn during today's Power Session that you would like to incorporate into your regular lead generation program? What did you list on your Lead Generation Action Planning Worksheet that you can start doing?

This calendar is your flexible draft. Sketch out how you will handle your time here. Then, add these activities to your real calendaring system—whether it's an electronic calendar, like Microsoft Outlook, or a paper-based calendar.

The Daily Discipline Begins with Time Blocking



	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
8		8	8	8	8	8	8
9		9	9	9	9	9	9
10		10	10	10	10	10	10
11		11	11	11	11	11	11
12		12	12	12	12	12	12
1		1	1	1	1	1	1
2		2	2	2	2	2	2
3		3	3	3	3	3	3
4		4	4	4	4	4	4
5		5	5	5	5	5	5
Evening	Evening	Evening	Evening	Evening	Evening	Evening	Evening