

4 Month Plan of Attack to Meet End of Year Objectives

You just walked into the “War Room” where your mission is to meet specific, clear objectives by the end of the next four months. The General has appointed you to detail the plan of attack for this last stretch before the end of the mission. We must meet our objectives within the last 4 months of the year. It is now up to you to create the plan to succeed.

If it was my task to create such a plan, these are the 4 steps I’d take to put my team and myself in position to meet every objective we set. Sometimes, “HOW” you create a plan is vitally important and this is one of those times. Answer all the questions and then choose the one or two objectives to put in the plan in great detail.

Action #1: Clearly define all objectives in as much detail as possible. The Objectives:

1. MDRT, we have X and we need Y to be a member (or ToFT, or CoFT) under path #1, and we need X and Y to be a member under the alternate rules of path #2
2. Gross Rev. Target a specific number for Gross Revenue for the business
3. Number of Cases and types of cases. Target specific numbers for one or two of these, no more
4. Create systems to measure objectives, monitor trends, and report the results regularly to the team

Action #2: Set up to use directive Thinking on Purpose to take advantage of our mind

1. Keep the objectives physically in sight. Use a white board, signs, notes, sticky-notes, reminders
2. Visualization: create clear pictures of what reaching objectives looks like and then see that picture, replay the video recording, at least 3 times a day
3. Clearly define why you want to achieve these objectives. Your “why”, when it is wrapped in passion and fueled with emotion will drive you and your team to find solutions and do the work to reach the objectives in ways you may not even know exist at this point

Action #3: Plan two strategies with the best chance to get to the objective. Two so you can focus. No more. For each strategy create detailed plans for 3 specific areas. This will become your Strategic Action Plan

1. Marketing and Prospecting
 - a. Which marketing events and campaigns will you use and when? Put them on the calendar
 - b. How will you engage with existing clientele?
 - c. Which organizations will you utilize to help you meet new prospects?
2. Sales Systems: What is the sales process and what language will you use at each step?
3. Implementation: What are you going to do and when? Use your calendar to plan.

Action #4: Plan your work and work your plan

1. Create the overall 4 month plan with every event and special activity you will need
2. Break that down each month into the Monthly Plan
3. Use the Monthly Plan to build each week’s plan the weekend before in detail
4. Build a daily plan for each weekday in the coming week
5. Tweak tomorrow’s plan at the end of the day today to be ready for tomorrow