

Table 1. Current Sales Numbers

	<b>Salesperson A</b>	<b>Salesperson B</b>
Number of calls per day (productivity)	20	10
Close ratio (performance)	1:20	1:10
Total sales per day	1	1

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Table 2. Before Sales Results

**BEFORE**

	Salesperson A	Salesperson B
Number of calls per day (productivity)	20	10
Close ratio (performance)	1:20	1:10
Total sales per day	1	1

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Table 3. After Sales Results

**AFTER**

	Salesperson A	Salesperson B
Number of calls per day (productivity)	20	20
Close ratio (performance)	1:10	1:10
Total sales per day	2	2
Percentage increase in sales	100%	100%

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Figure 1. Productivity



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Figure 2. Performance



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Figure 3. Performance and productivity

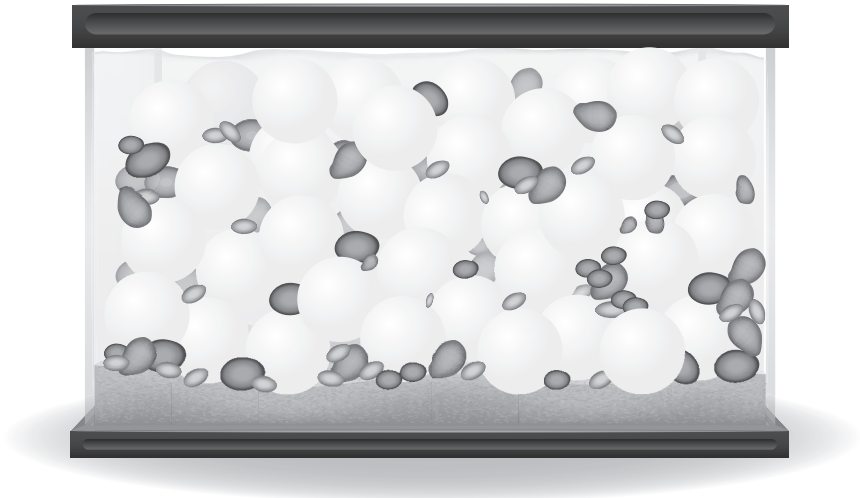


Figure 4. The Do What Matters Most matrix

	URGENT	NOT URGENT
IMPORTANT	<p><b>Q1</b></p> <p><b>DO IT!</b> High stress, high-priority</p> <p><b>EXAMPLES</b> Crises, emergency meetings, client concerns, pressing problems, deadlines, fires, emergencies</p>	<p><b>Q2</b></p> <p><b>FOCUS</b> Low stress, high-priority</p> <p><b>EXAMPLES</b> Roles and goals, pre-week planning, weekly alignment meeting, relationship building, exercise, strategic planning, personal or team development</p>
NOT IMPORTANT	<p><b>Q3</b></p> <p><b>MANAGE</b> Urgent, not important</p> <p><b>EXAMPLES</b> Some email or mail, unnecessary meetings or reports, interruptions, unannounced calls or visits</p>	<p><b>Q4</b></p> <p><b>ELIMINATE</b> Not urgent, not important</p> <p><b>EXAMPLES</b> Some TV, surfing the internet, wasted time, mindless activities</p>

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Figure 5. The full aquarium



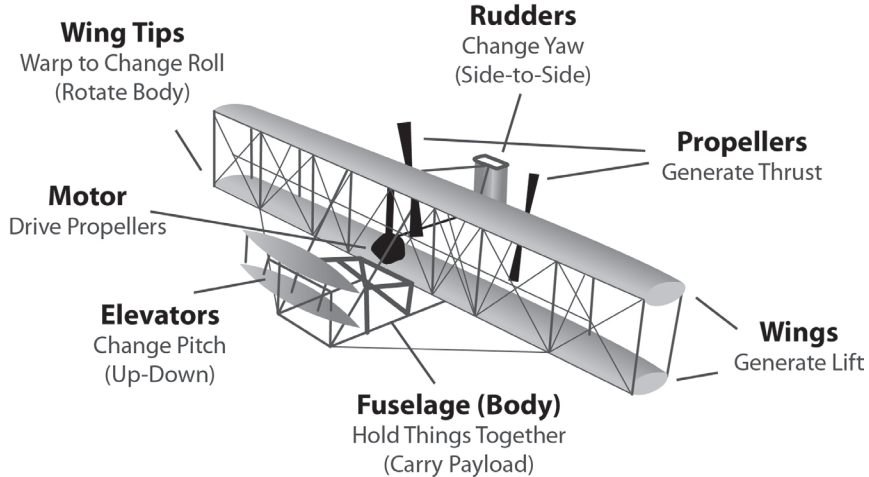
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Figure 6. The aquarium full of water



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Figure 7. A diagram of the Wright Flyer





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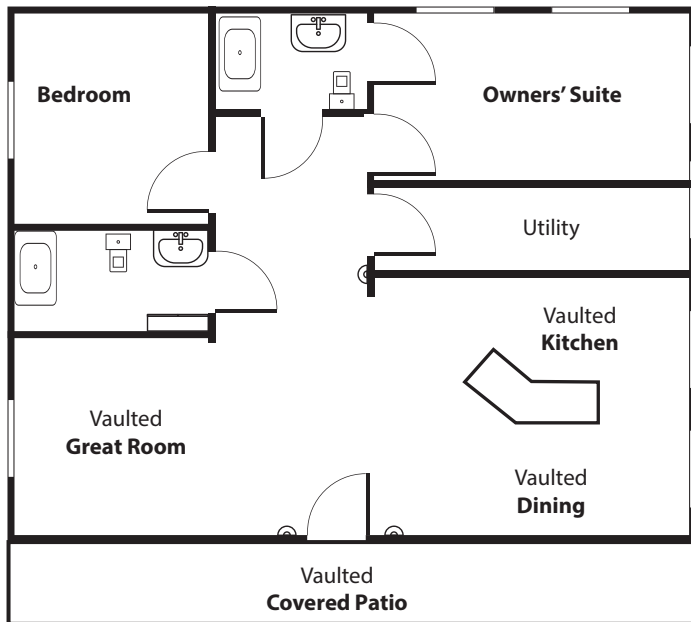
Figure 8. First flight<sup>16</sup>



Figure 9. Flying in formation



Figure 10. Dream home schematic



## VISION AND GOALS FOR 202X

<b>Role:</b>	<b>Personal (Physical, Mental, Emotional, Spiritual)</b>
<b>Vision:</b>	
<b>Annual Goals:</b>	
<b>Role:</b>	<b>Manager</b>
<b>Vision:</b>	
<b>Annual Goals:</b>	1
	2
	3
	4
<b>Role:</b>	<b>Parent</b>
<b>Vision:</b>	
<b>Annual Goals:</b>	1
	2
	3
	4
<b>Role:</b>	<b>Spouse or Partner</b>
<b>Vision:</b>	
<b>Annual Goals:</b>	1
	2
	3
	4

Figure 11. Visions and goals template

Figure 12. Visions and goals in a different format

## My Personal Vision and Goals

**“You will either lead a life by design or live a life by default!”**

Role: Personal (Physical, Mental, Emotional, Spiritual)

Vision: \_\_\_\_\_  
\_\_\_\_\_

Goal(s):

Physical: \_\_\_\_\_  
\_\_\_\_\_

Mental: \_\_\_\_\_  
\_\_\_\_\_

Emotional: \_\_\_\_\_  
\_\_\_\_\_

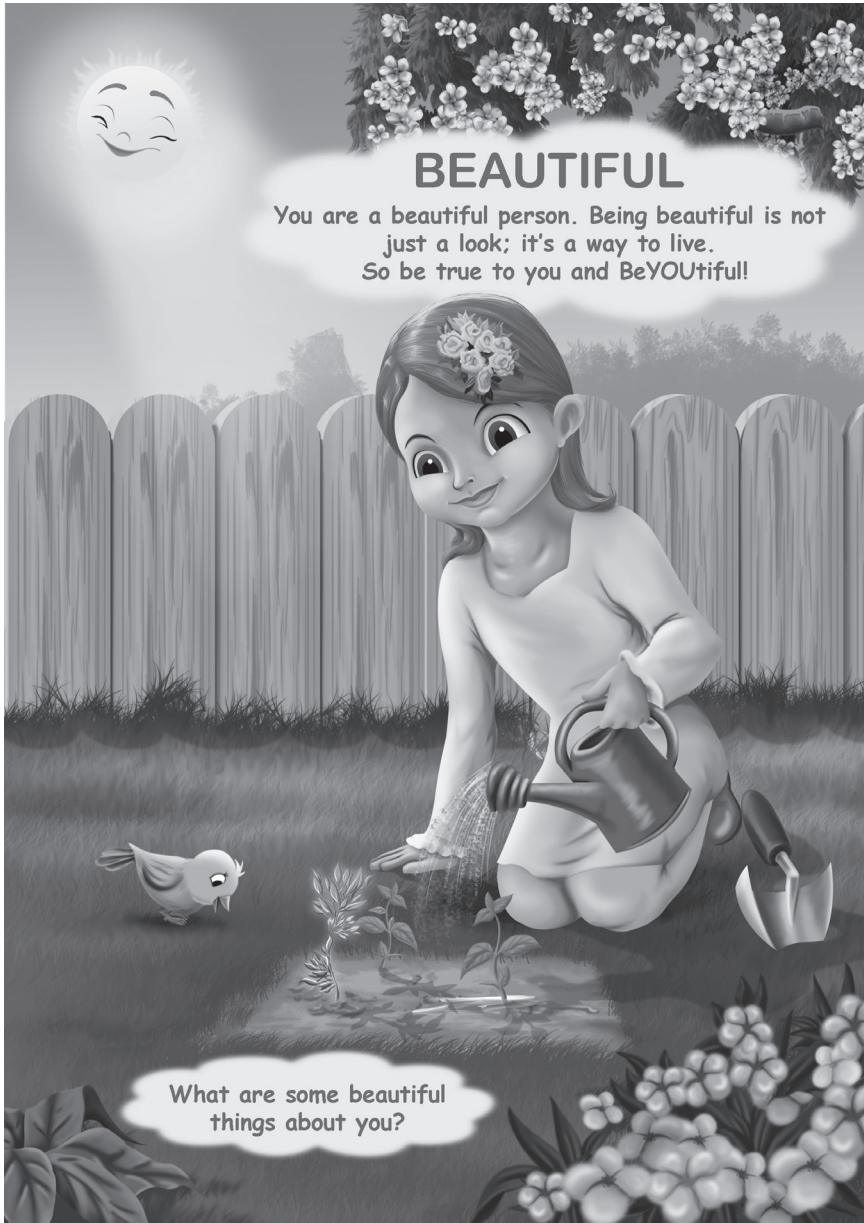
Spiritual: \_\_\_\_\_  
\_\_\_\_\_

Role: \_\_\_\_\_

Vision: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

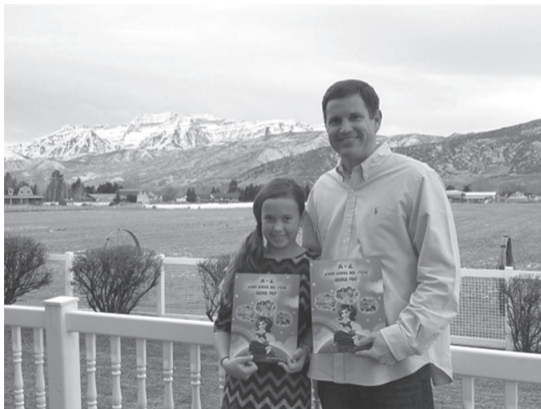
Goal(s): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Figure 13. A page from Bella's book



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Figure 14. Bella's completed book



## VISION AND GOALS FOR 202X

<b>Role:</b>	<b>PERSONAL (Physical, Mental, Emotional, Spiritual)</b>
<b>Vision:</b>	I choose to live a balanced, healthy lifestyle and I am in great physical shape. I maintain a high level of spirituality and my relationship with God is of the utmost importance. I am financially free with no debt or financial obligations to anyone. I am disciplined, focused, and put in the effort to do what matters most!
<b>Annual Goals:</b>	Physical: Run a 10k by September 1st. Average 72 BPM by July 1st.
	Mental: Read at least 12 improvement/motivation books before Dec 30th.
	Emotional: Average two yoga sessions per week.
	Spiritual: Read the Old Testament before Dec 30th.
<b>Role:</b>	<b>MANAGER</b>
<b>Vision:</b>	I am a transformational leader who knows the stories of my team members. I invest in whatever resources I can to give my team the best training and help them reach their fullest potential. I'm the type of leader they would support and follow without the title!
<b>Annual Goals:</b>	1 Finalize the strategic plan for our division by February 1st.
	2 Do a Continue-Start-Stop with all employees by April 1st.
	3 Achieve \$1.5M in sales by December 27th.
	4 Acquire 15 new customer contracts by June 1st.
<b>Role:</b>	<b>PARENT</b>
<b>Vision:</b>	I am an example in thought and deed of what a true gentleman looks like. I am the type of person I want my daughters to marry. I am present with my children and we constantly develop great memories together. I help them see their potential and how they can make a difference in the world. I am vulnerable and I empathize with them.
<b>Annual Goals:</b>	1 Average one family weekend trip within five hours of our home every other month.
	2 Take each kid on at least one, one-on-one trip before Dec 30th.
	3 Help each child finish their Roles and Goals by January 10th.
	4 Average one fun daddy/daughter (son) date night per month.
<b>Role:</b>	<b>SPOUSE OR PARTNER</b>
<b>Vision:</b>	I am a kind and caring husband who always helps Tonya feel like a 10. I am totally faithful in thought and action and I constantly strive to compliment her, serve her, and be the husband of her dreams!
<b>Annual Goals:</b>	1 Read Start with the Vision together and go through the Six-Step Process for our relationship by July 1st.
	2 At least two weekend getaway trips together before December 30th.
	3 Average two dates a month without the children.
	4 Finalize a family vision by March 1st.

Figure 15. Example template for vision and goals



Figure 16. The results of pre-week planning for one month

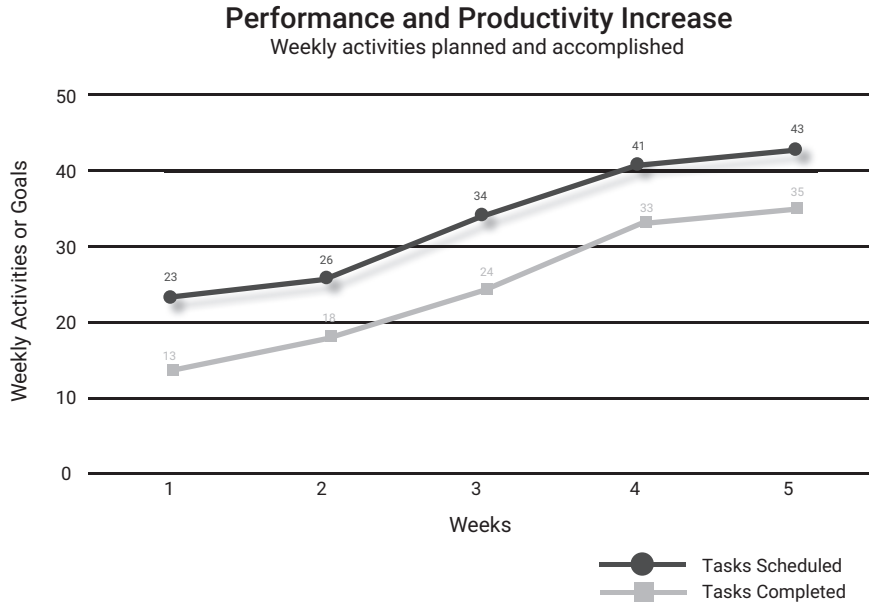


Figure 17. Lana's note

Thanks for the  
nice Note. It made  
me feel so nice.  
In fact it made my  
day. By the way  
I ♡ you to the  
moon and back  
even more than  
all of the Jelly  
Beans in the  
world!

LVG ♡ Lana ♡

DEC 28-31; JAN 1-3

PRINCIPLE OF THE WEEK:

Roles:	Personal				
ACTION ITEMS					

<b>TO DO</b>	<b>28 MONDAY</b>	
		1 pm
	6 am	2 pm
	7 am	3 pm
	8 am	4 pm
	9 am	5 pm
	10 am	6 pm
	11 am	7 pm
	NOON	8 pm
	<b>29 TUESDAY</b>	
		1 pm
	6 am	2 pm
	7 am	3 pm
	8 am	4 pm
	9 am	5 pm
	10 am	6 pm
	11 am	7 pm
	NOON	8 pm
	<b>30 WEDNESDAY</b>	
		1 pm
	6 am	2 pm
	7 am	3 pm
	8 am	4 pm
	9 am	5 pm
	10 am	6 pm
	11 am	7 pm
	NOON	8 pm

Pre-Week Planning

1. Review your vision, annual goals, and calendar.
2. Write your roles (Personal, Work, Family, etc.).
3. Set action items for each role.
4. Schedule a time for each action item.

WEEKLY PRODUCTIVITY %


	<b>THURSDAY 31</b> NEW YEAR'S EVE	<b>TO DO</b>
	6 am	1 pm
	7 am	2 pm
	8 am	3 pm
	9 am	4 pm
	10 am	5 pm
	11 am	6 pm
	NOON	7 pm
		8 pm
	<b>FRIDAY 1</b> NEW YEAR'S DAY	
		1 pm
	6 am	2 pm
	7 am	3 pm
	8 am	4 pm
	9 am	5 pm
	10 am	6 pm
	11 am	7 pm
	NOON	8 pm
<b>SATURDAY 2</b>	<b>SUNDAY 3</b>	<b>Motivation for the Week</b>
		"Action expresses priorities." — Mahatma Gandhi

Figure 18. Blank pre-week planning template

Figure 19. A completed pre-week planning example

<b>Roles:</b>	Personal	Spouse	Parent		
<b>ACTION ITEMS</b>	Exercise 5x	Date Night	Send Reunion Email		
	Schedule Doctor Appt	Write Thank you Note	Basketball w/ Sam		
	Read 15 Pages a Day		Dinner with Toni		
	Review Finances				

<b>TO DO</b>					
	<b>5 MONDAY</b>				
	6 am	1 pm			
	7 am	2 pm			
	8 am	3 pm			
	9 am	4 pm			
	10 am	5 pm	Review Finances		
	11 am	6 pm			
	NOON	7 pm			
		8 pm			
	<b>6 TUESDAY</b>				
	6 am	1 pm			
	7 am	2 pm	Send Reunion Email		
	8 am	3 pm			
	9 am	4 pm			
	10 am	5 pm			
	11 am	6 pm			
	NOON	7 pm			
		8 pm			
	<b>7 WEDNESDAY</b>				
	6 am	1 pm			
	7 am	2 pm			
	8 am	3 pm			
	9 am	4 pm			
	10 am	5 pm			
	11 am	6 pm			
	NOON	7 pm			
		8 pm	Dinner with Toni		

<b>THURSDAY 8</b>					
6 am	1 pm				
7 am	2 pm				
8 am	3 pm	Have Division Mtg			
9 am	4 pm				
10 am	5 pm				
11 am	6 pm				
NOON	7 pm				
	8 pm				
<b>FRIDAY 9</b>					
6 am	1 pm				
7 am	2 pm				
8 am	3 pm				
9 am	4 pm				
10 am	5 pm				
11 am	6 pm	Date Night			
NOON	7 pm				
	8 pm				
<b>SATURDAY 10</b>					

<b>TO DO</b>					

<b>Pro-Week Planning</b>	<ol style="list-style-type: none"> <li>1. Review your vision, annual goals, and calendar.</li> <li>2. Write your roles (Personal, Work, Family, etc.).</li> <li>3. Set action items for each role.</li> <li>4. Schedule a time for each action item.</li> </ol>	<b>WEEKLY PRODUCTIVITY %</b>
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<b>Manager</b>	<b>Artist</b>			
Call Joe	Sketch Sunset			
Have Division Mtg				
Submit Tax Report				
App Plan Draft				

<b>Motivation for the Week</b>
<p>"Optimism is the faith that leads to achievement. Nothing can be done without hope and confidence." — Helen Keller</p>

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## Figure 20. Write your roles

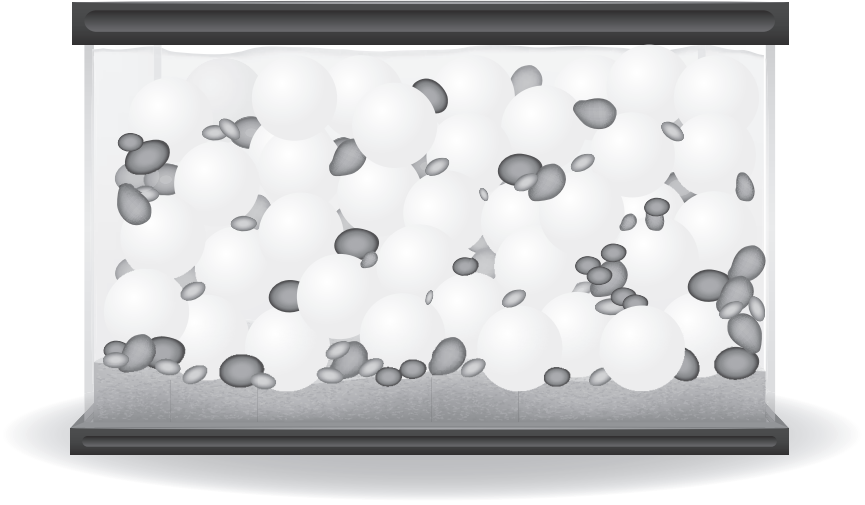
Roles:	Personal		<i>Spouse</i>		Parent		<i>Manager</i>		<i>Artist</i>
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Figure 21. Set action items for each role

Roles:	Personal	Spouse	Parent	Manager	Artist
ACTION ITEMS	Exercise 5x	Date Night	Send Reunion Email	Call Joe	Sketch Sunset
	Schedule Doctor Appt.	Write Thank you Note	Basketball w/ Sam	Have Division Mtg.	
	Read 15 Pages a Day		Dinner with Toni	Submit Tax Report	
	Review Finances			App Plan Draft	

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Figure 22. The ping pong ball example



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Figure 23. The bullseye example



Roles:	Personal	Spouse	Parent
ACTION ITEMS	Exercise 5x	Date Night	Send Reunion Email
	Schedule Doctor Appt.	Write Thank you Note	Basketball w/ Sam
	Read 15 Pages a Day		Dinner with Toni
	Review Finances		

**Pro-Week Planning**

- Review your vision, annual goals, and calendar.
- Write your roles (Personal, Work, Family, etc.)
- Set action items for each role.
- Schedule a time for each action item.

**WEEKLY PRODUCTIVITY %**

Manager	Artist
Call Joe	Sketch Sunset
Have Division Mtg.	
Submit Tax Report	
App Plan Draft	

**TO DO**

**5 MONDAY**

6 am	2 pm
7 am	3 pm
8 am	4 pm
9 am	5 pm
10 am	6 pm
11 am	7 pm
NOON	8 pm

Review Finances

**6 TUESDAY**

6 am	2 pm
7 am	3 pm
8 am	4 pm
9 am	5 pm
10 am	6 pm
11 am	7 pm
NOON	8 pm

Send Reunion Email

**7 WEDNESDAY**

6 am	2 pm
7 am	3 pm
8 am	4 pm
9 am	5 pm
10 am	6 pm
11 am	7 pm
NOON	8 pm

Dinner with Toni

**THURSDAY 8**

6 am	2 pm
7 am	3 pm
8 am	4 pm
9 am	5 pm
10 am	6 pm
11 am	7 pm
NOON	8 pm

Have Division Mtg.

**FRIDAY 9**

6 am	2 pm
7 am	3 pm
8 am	4 pm
9 am	5 pm
10 am	6 pm
11 am	7 pm
NOON	8 pm

Date Night

**SATURDAY 10**

**SUNDAY 11**

**Motivation for the Week**

"Optimism is the faith that leads to achievement. Nothing can be done without hope and confidence."  
— Helen Keller

Figure 24. Schedule a time for each action item.



Figure 25. The Do What Matters Most matrix

