

The 12-week year: How to plan your next quarter

Free planner
and step-by-step guide

pipedrive

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How to use this ebook

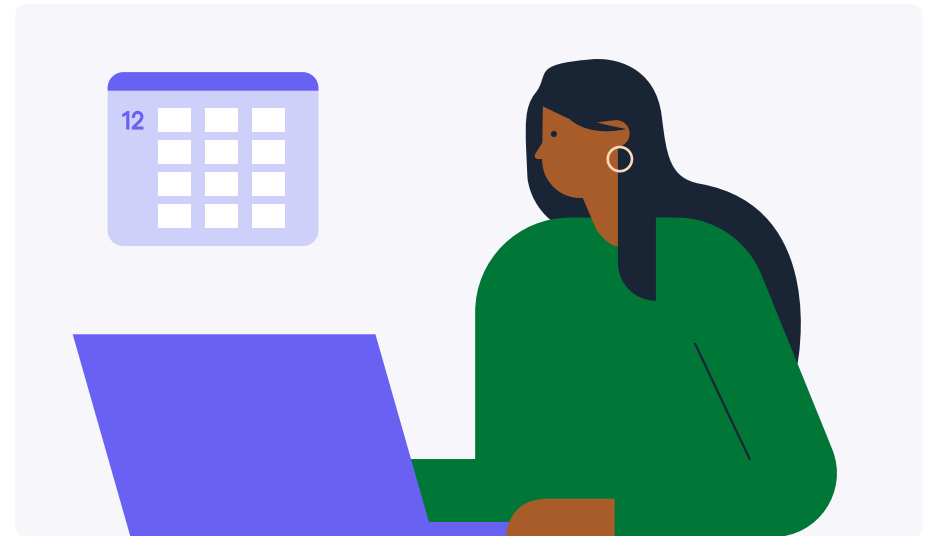
In the fast-paced world of sales and marketing, you need to find ways to maximize productivity and achieve your goals efficiently.

The 12-week year is an approach that revolutionizes strategic planning for organizations and individuals by approaching each year as if it were made up of only 12 weeks. The idea is that treating each quarter as a mini-year creates a sense of urgency, accelerating professional and personal progress.

In this step-by-step guide, we'll provide an intuitive 12-week-year template along with actionable insights you can use to guide your planning process.

You'll learn:

- What steps you need to take to create an effective 12-week year plan
- What to include in your 12-week goals to make them specific, achievable and measurable
- How to track your progress and keep yourself accountable



This ebook is designed to accompany our detailed [12-week year](#) guide. Reference this guide for further insights into how to create the most effective 12-week-year plan.

Step 1:

Create your vision

Your vision is a compelling goal, or set of goals, that you want to achieve in the long term. It links your professional goals to your personal aspirations. It will be the driving force that motivates you to accomplish your smaller goals.

Break your vision down into long-term goals (called 3-year goals). These act as stepping stones to achieve your vision. Then break those into achievable 12-week goals.

For example, say you have the long-term vision to become a top sales executive. Your 3-year goal might be to get promoted to regional manager at your company. Here's what you might record:

Long-term vision

I will become the leading sales executive at the company I work for.

3-year goals

In 3 years, I will achieve a position as regional sales manager for my area.

You can now determine the 12-week goals that will move you toward this first 3-year goal.

Step 2:

Create your 12-week year goals

Now, it's time to break down your long-term goals into achievable actions you'll complete each week.

Example: If your 3-year goal is to become a regional sales manager, your short-term goals might include:

1. Reduce your sales cycle length
2. Taking a sales course
3. Enhancing your product knowledge

Here's an example of the goals you might set:

12-week goals

- 1.** Reduce my sales cycle length by 10% by the end of the quarter
- 2.** Complete one sales certification course by the end of the quarter
- 3.** Become an expert in our core product by the end of the quarter

To ensure you stay focused and make progress on your 12-week goals, use the SMART goal-setting framework.

- **Specific:** Narrow your goal down to one specific thing, like reducing the sales cycle length.
- **Measurable:** Ensure that you can track and measure the goal. For example, you want to speed up the sales cycle by 10%.
- **Achievable:** Analyze your current performance to make sure the goal is realistic and attainable. For example, say you've noticed some inefficiencies in your sales process. Eliminating them will significantly speed up the process, so 10% is a reasonable target.
- **Relevant:** Check that your goal aligns with your 3-year goals and overall vision. Closing deals faster will show company leaders you have the skills to become a manager.
- **Time-based:** Make sure your goal has a due date. For example, you want to achieve this goal by the end of the quarter.

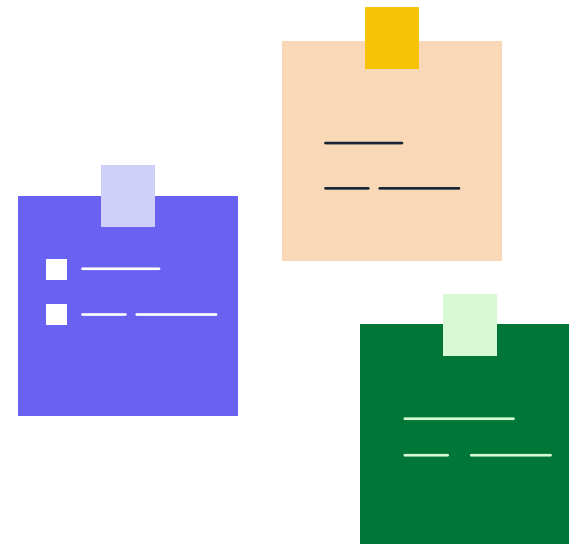
Step 3:

Determine your key tasks and daily activities

Now you have a clear long-term vision and a set of goals to accomplish in the next twelve weeks to make this vision a reality.

The next step is to work out what daily actions you need to take to complete each of these 12-week goals. For each action, specify a due date. This is important for both one-off tasks and daily activities.

Check out the “Week 1 plan” template below for an example of how this works:



Week 1 plan

Goal:	Key tasks and activities	Due date
	Audit the current process to see which tasks I'm repeating frequently and determine which can be automated	9-Sep-24
	Set up automations in the company's customer relationship management (CRM) software to free up time for building relationships and moving sales forward	12-Sep-24
	Set a specific goal for each client call to boost close rates	Daily

Step 4:

Schedule regular planning sessions and weekly reviews

With the 12-week year, you can plan for each quarter as if it's an entire year. Putting so much effort into a shorter period will make you more productive in a quarter than you usually are in an entire year.

Planning only goes so far, though. You'll inevitably face challenges that require you to change your plans on the fly to achieve your goals.

Constantly reviewing your progress will help you make sure you're on track to achieve your goals. It will also enable you to adjust your plans in light of your successes and failures.

We recommend setting a time at the end of each week to review your previous week's progress and schedule any new tasks you need to complete.

Add notes on what went well and what improvements you want to make in the coming week.

Calculate your success rate with the following formula:

$$\text{Tasks completed} / \text{Total tasks} \times 100 = \text{Success rate}$$

Here's an example of what this might look like in practice:

Week 1 review

Notes: Completed 35 sales calls each day, but had a low close rate. Need to tweak goals and sales pitch to address common objections – add to next week's tasks. Also came up with a few ideas to improve the sales process. Schedule a meeting with the sales manager next week to pitch ideas.

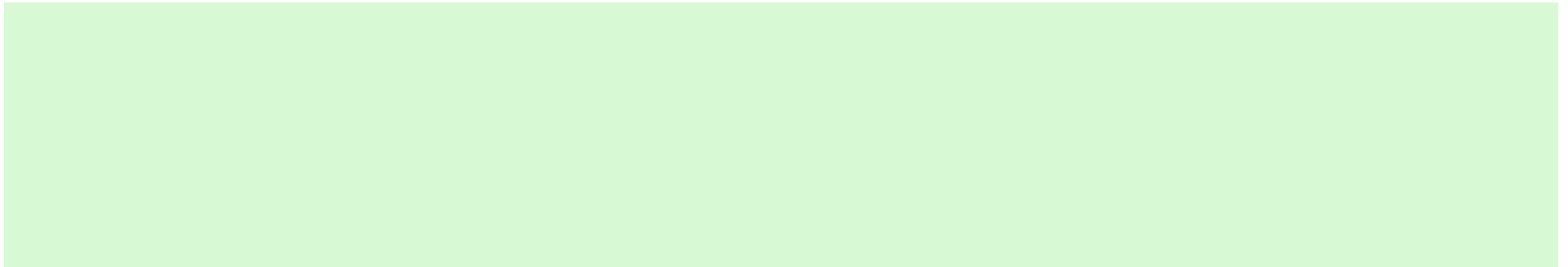
Week 1 scorecard

$$\text{Tasks completed} / \text{Total tasks} \times 100 = \text{Success rate}$$

$$9 \text{ tasks completed} / 12 \text{ total tasks} \times 100 = 75\% \text{ success rate}$$

12-week year planner templates

My long-term vision



My 3-year goals

Goal 1	
Goal 2	
Goal 3	

Week 1 plan

Take 15 minutes to plan your week. Decide on the goal(s) you're going to focus on and what actions you can complete this week to achieve them

<div>Week 1 goal(s):</div> <div></div> <div>What activities will you do this week to accomplish the above?</div>	<div>Key tasks and activities</div> <div></div>	<div>Due date</div> <div></div>
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Week 1 review card

Review how your week went. Consider how successful it was as well as any roadblocks you encountered. Write down any notes or lessons that you can use to improve your planning in the future.

Notes:

Week 1 scorecard

Score yourself based on how many of your tasks you completed this week.

Tasks completed / Total tasks x 100 = Success rate ÷ x 100 =

Week 2 plan

Take 15 minutes to plan your week. Decide on the goal(s) you're going to focus on and what actions you can complete this week to achieve them

<div>Week 2 goal(s):</div> <div></div> <div>What activities will you do this week to accomplish the above?</div>	<div>Key tasks and activities</div> <div></div>	<div>Due date</div> <div></div>
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Week 2 review card

Review how your week went. Consider how successful it was as well as any roadblocks you encountered. Write down any notes or lessons that you can use to improve your planning in the future.

Notes:

Week 2 scorecard

Score yourself based on how many of your tasks you completed this week.

Tasks completed / Total tasks x 100 = Success rate ÷ x 100 =

Week 3 plan

Take 15 minutes to plan your week. Decide on the goal(s) you're going to focus on and what actions you can complete this week to achieve them

<div>Week 3 goal(s):</div> <div></div> <div>What activities will you do this week to accomplish the above?</div>	<div>Key tasks and activities</div> <div></div>	<div>Due date</div> <div></div>
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Week 3 review card

Review how your week went. Consider how successful it was as well as any roadblocks you encountered. Write down any notes or lessons that you can use to improve your planning in the future.

Notes:

Week 3 scorecard

Score yourself based on how many of your tasks you completed this week.

Tasks completed / Total tasks x 100 = Success rate ÷ x 100 =

Week 4 plan

Take 15 minutes to plan your week. Decide on the goal(s) you're going to focus on and what actions you can complete this week to achieve them

<div>Week 4 goal(s):</div> <div></div> <div>What activities will you do this week to accomplish the above?</div>	<div>Key tasks and activities</div> <div></div>	<div>Due date</div> <div></div>
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Week 4 review card

Review how your week went. Consider how successful it was as well as any roadblocks you encountered. Write down any notes or lessons that you can use to improve your planning in the future.

Notes:

Week 4 scorecard

Score yourself based on how many of your tasks you completed this week.

Tasks completed / Total tasks x 100 = Success rate ÷ x 100 =

Week 5 plan

Take 15 minutes to plan your week. Decide on the goal(s) you're going to focus on and what actions you can complete this week to achieve them

<div>Week 5 goal(s):</div> <div></div> <div>What activities will you do this week to accomplish the above?</div>	<div>Key tasks and activities</div> <div></div>	<div>Due date</div> <div></div>
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Week 5 review card

Review how your week went. Consider how successful it was as well as any roadblocks you encountered. Write down any notes or lessons that you can use to improve your planning in the future.

Notes:

Week 5 scorecard

Score yourself based on how many of your tasks you completed this week.

Tasks completed / Total tasks x 100 = Success rate ÷ x 100 =

Week 6 plan

Take 15 minutes to plan your week. Decide on the goal(s) you're going to focus on and what actions you can complete this week to achieve them

<div>Week 6 goal(s):</div> <div></div> <div>What activities will you do this week to accomplish the above?</div>	<div>Key tasks and activities</div> <div></div>	<div>Due date</div> <div></div>
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Week 6 review card

Review how your week went. Consider how successful it was as well as any roadblocks you encountered. Write down any notes or lessons that you can use to improve your planning in the future.

Notes:

Week 6 scorecard

Score yourself based on how many of your tasks you completed this week.

Tasks completed / Total tasks x 100 = Success rate ÷ x 100 =

Week 7 plan

Take 15 minutes to plan your week. Decide on the goal(s) you're going to focus on and what actions you can complete this week to achieve them

Week 7 goal(s):	Key tasks and activities	Due date
<p>What activities will you do this week to accomplish the above?</p>		

Week 7 review card

Review how your week went. Consider how successful it was as well as any roadblocks you encountered. Write down any notes or lessons that you can use to improve your planning in the future.

Notes:

Week 7 scorecard

Score yourself based on how many of your tasks you completed this week.

Tasks completed / Total tasks x 100 = Success rate ÷ x 100 =

Week 8 plan

Take 15 minutes to plan your week. Decide on the goal(s) you're going to focus on and what actions you can complete this week to achieve them

<div>Week 8 goal(s):</div> <div></div> <div>What activities will you do this week to accomplish the above?</div>	<div>Key tasks and activities</div> <div></div>	<div>Due date</div> <div></div>
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Week 8 review card

Review how your week went. Consider how successful it was as well as any roadblocks you encountered. Write down any notes or lessons that you can use to improve your planning in the future.

Notes:

Week 8 scorecard

Score yourself based on how many of your tasks you completed this week.

Tasks completed / Total tasks x 100 = Success rate ÷ x 100 =

Week 9 plan

Take 15 minutes to plan your week. Decide on the goal(s) you're going to focus on and what actions you can complete this week to achieve them

<div>Week 9 goal(s):</div> <div></div> <div>What activities will you do this week to accomplish the above?</div>	<div>Key tasks and activities</div> <div></div>	<div>Due date</div> <div></div>
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Week 9 review card

Review how your week went. Consider how successful it was as well as any roadblocks you encountered. Write down any notes or lessons that you can use to improve your planning in the future.

Notes:

Week 9 scorecard

Score yourself based on how many of your tasks you completed this week.

Tasks completed / Total tasks x 100 = Success rate ÷ x 100 =

Week 10 plan

Take 15 minutes to plan your week. Decide on the goal(s) you're going to focus on and what actions you can complete this week to achieve them

<div>Week 10 goal(s):</div> <div></div> <div>What activities will you do this week to accomplish the above?</div>	<div>Key tasks and activities</div> <div></div>	<div>Due date</div> <div></div>
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Week 10 review card

Review how your week went. Consider how successful it was as well as any roadblocks you encountered. Write down any notes or lessons that you can use to improve your planning in the future.

Notes:

Week 10 scorecard

Score yourself based on how many of your tasks you completed this week.

Tasks completed / Total tasks x 100 = Success rate ÷ x 100 =

Week 11 plan

Take 15 minutes to plan your week. Decide on the goal(s) you're going to focus on and what actions you can complete this week to achieve them

<div>Week 11 goal(s):</div> <div></div> <div>What activities will you do this week to accomplish the above?</div>	<div>Key tasks and activities</div> <div></div>	<div>Due date</div> <div></div>
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Week 11 review card

Review how your week went. Consider how successful it was as well as any roadblocks you encountered. Write down any notes or lessons that you can use to improve your planning in the future.

Notes:

Week 11 scorecard

Score yourself based on how many of your tasks you completed this week.

Tasks completed / Total tasks x 100 = Success rate ÷ x 100 =

Week 12 plan

Take 15 minutes to plan your week. Decide on the goal(s) you're going to focus on and what actions you can complete this week to achieve them

<div>Week 12 goal(s):</div> <div></div> <div>What activities will you do this week to accomplish the above?</div>	<div>Key tasks and activities</div> <div></div>	<div>Due date</div> <div></div>
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Week 12 review card

Review how your week went. Consider how successful it was as well as any roadblocks you encountered. Write down any notes or lessons that you can use to improve your planning in the future.

Notes:

Week 12 scorecard

Score yourself based on how many of your tasks you completed this week.

Tasks completed / Total tasks x 100 = Success rate ÷ x 100 =

Achieve your targets with a dedicated CRM platform

Pipedrive is an easy-to-use, effective, scalable CRM that helps sales and marketing teams achieve their goals more efficiently. Use Pipedrive to generate and qualify leads, track customers and create accurate forecasts.

Here's how Pipedrive can empower your team to hit their 12-week goals:

- **Automate repetitive tasks.** Eliminate mundane tasks like manual data entry with easy-to-set-up [workflow automation](#) and triggered events.
- **Generate and engage leads.** Capture high-quality inbound and outbound leads with Pipedrive's [LeadBooster add-on](#). Leverage its 24/7 conversational Chatbot, [Live Chat](#), [Web Forms](#) and a database of over 400 million qualified leads.

- **Track customers and leads.** Monitor your leads and customers as they move through the sales funnel with Pipedrive's [lead tracking software](#).
- **Get insights when you need them.** Pipedrive's [Insights and Reports](#) feature helps you leverage your CRM data and find winning strategies.





Want to learn more about how Pipedrive works?

[Try Pipedrive for free for 14 days](#) and see how we can help your business grow

