4-1-1

The 4-1-1 is a productivity tool that is designed to help associates set and achieve their goals. It gives agents an instrument by which they can be accountable for their production both to themselves and to a consultant. To set and track your goals, follow the instruction set forth in this manual.

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Introduction

**"If it is now you want to win,
then focus on what, how and when."**

What is the 4-1-1?

4-1-1 stands for 4 weeks, 1 month, 1 year. At Keller Williams, we use the 4-1-1 as a productivity tool to reflect your top priorities—your "Big Rocks." The 4-1-1 tool allows you to define your weekly, monthly, and annual goals. Because your daily activities manifest into your overall results, the goals you set are an effective and crucial accountability function of your business.

The 4-1-1 tool on KW's intranet offers you the ability to manage, update and store your personal goals online. Before you get started with your goal management, you must first select which month and year you want to begin setting your goals. Now you are ready to enter your weekly, monthly and yearly goals. Once your goals are added, you can then:

- ☑ Transfer goals from a previous period,
- ☑ Update the goal status,
- ☑ Change the priority of your list of goals
- ☑ Print your 4-1-1, and
- ☑ Save your 4-1-1 to a file on your computer.

Before you start filling out your 4-1-1, you should focus on the goals that matter most to you. Here are some things to address:

What is it that you want to accomplish?
Start with the end in mind. And be specific about what you want; vague goals will yield inconsistent results.

How are you going to achieve these things?
You should have a clear idea of how you are going to achieve your goals—that is, what strategies and activities will actually cause those goals to be realized. If you are unsure, consult with someone who can help you get clarity.

When are you going to accomplish these things?
Your time frame should be laid out on your calendar. Time blocking is the key to avoiding distraction and focusing your energy.

Getting Started

Goals

Once you have personal clarity, now it is time to put your goals in writing. No matter what your goals are, they will be more empowering if they are **"SMART"**. This is the first step to working smarter not harder.

S	M	A	R	T
Specific	**Measurable**	**Action Oriented**	**Realistic**	**Time Bound**
Be tangible and precise in stating your goals. General goals are not compelling.	Set goals that are quantifiable. You need to able to know if a goal is accomplished.	The best goals drive you to take action and do something concrete.	Make your goals realistic but not pessimistic. The most empowering goals require a stretch to achieve them. Ask yourself what the probability of accomplishing each goal is. A 50/50 chance is best—neither too difficult nor too easy	You must have a clear time limit or deadline for getting goals done.

Annual Goals

You should set aside 1-3 days each year to think about and crystallize these one-year goals.

Get clear on your "Big Rocks", those 5-7 key goals that you must achieve in order to feel that you have had a successful year. These are written in terms of gauges. **Gauges** are those goals that act as measures of your intended results (i.e., "I want to double my last year's production."). Accomplishing this type of goal is the desired end in itself.

Annual goals should reflect each of the key areas of your life. There can be many categories, but we have found the following 4 areas to be most useful:

- o **Job** – What will you do?
- o **Business** – What will your business or team do?
- o **Personal** – What do you desire to have happen personally (health, family, spiritual, educational, etc.)?
- o **Personal Financial** – What improvements do you desire in your net worth (reduced liabilities, increased investments, increased assets, etc.)?

Monthly Goals

You should set aside 1-3 hours each month to rethink and further refine your monthly goals. Focus on your methods of achievement: how will you position yourself in pursuit of your annual goals? Begin by breaking your annual goals down into their monthly increments. In addition, write down the key activity goals that will lead to those monthly results.
When deciding your monthly goals, remember to put first things first. Any goals that other goals hinge on would have higher priority. You should have no more than 5-7 monthly goals. And do not plan any more than one month ahead.

Weekly Goals

You should set aside ½-1 hour each week to form goals for the coming week.
Weekly goals are all levers—actions or activities. Levers are those goals that are the mechanisms or how-to's of achievement (i.e., "I will contact 10 people each day."). These weekly goals are the steps you will take toward your monthly and annual goals. Levers are the means to the ends.
Again, your weekly goals are not a to-do list, but rather a have-to-do list. Decide what you need to do that week to achieve your monthly goals, again remembering to put first things first. And limit your number of weekly goals to 6-8 key, measurable activities.
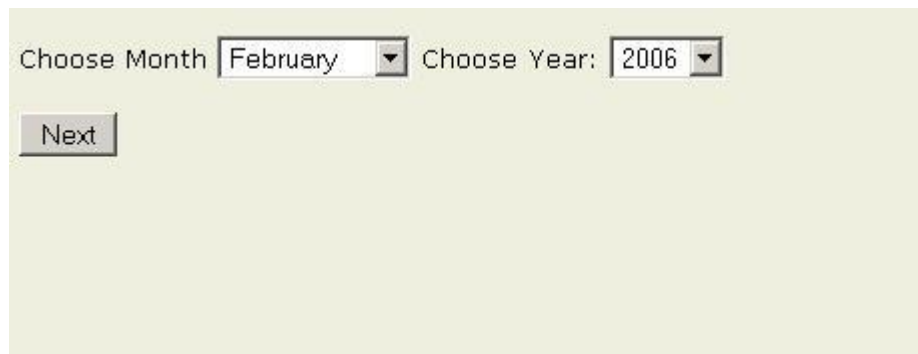
Calendar

The next step in the process is to put the activities on your calendar. Time blocking is setting aside pre-planned chunks of time for the purpose of doing the essential activities, and it is the key to goal achievement. This is the power step beyond simply using your calendar to schedule meetings and appointments with others. It is making appointments with yourself to do your key activities (i.e., "9-11 a.m. – Make 30 prospecting contacts.")

Using the 4-1-1 Tool

Each goal has two separate tasks you can manage: Edit Job Tasks and Edit Personal Tasks. Each featured task allows you to create, edit, prioritize, complete, and remove tasks that encompass your goals. The **Edit Job Tasks** feature focuses on what job functions will you do, complete, and what you want to do, etc. The **Edit Personal Tasks** feature focuses on what you desire to have happen personally: health, family, spiritual, educational, financial, etc.

Selecting your Time Frame

Use the drop down list to select the Month and Year of the goals you wish to manage, and then click the **Next** button to go to the 4-1-1 for that time frame.

Choose Month February ▼ Choose Year: 2006 ▼

Next

Creating/Adding Goals

To create/add a task, type the new task into the text box, and then click the **Add** button located below the text box.

Editing Goals

To edit your goals, click the edit icon next to the goal you want to edit. After editing the goal, click the **Edit** button to save your edited goal.

Prioritizing Goals
To prioritize your goals, click the up and down arrows to arrange the goal order according to its priority.

Completing Goals

To complete a goal, click on the ☐ box next to the goal. A **Select goal status** dialog box will appear:

Click on the ○ Check / Uncheck Goal from list option to insert a check mark indicating the goal is complete. A green check mark will appear next to the goal on your goal list to reflect the goal's "complete" status.

Click on the ○ Check / Uncheck Goal from list option to uncheck it indicating the goal is incomplete. The status box next to the goal on your goal list will now appear blank to reflect the goal's "incomplete" status.

Click the **Done** button to close the dialog box and save your changes.

Removing Goals

To remove a goal from your 4-1-1, click on the ☐ box next to the goal. A **Select goal status** dialog box will appear. Click on the ○ Delete Goal number from the list option to delete the goal from your 4-1-1. Click the **Done** button to close the dialog box and save your changes.

NOTE: Removing goals cannot be undone! Make sure that you want to delete the goal before removing it.
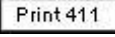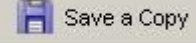
Printing 4-1-1

To print your 4-1-1, click the Print 411 **Print 411** button. A print screen will appear. Choose your print options.

Downloading 4-1-1

To download you 4-1-1, click the Download **Download** button. Another window will appear displaying a .pdf file. Click the 🖫 Save a Copy **Save a Copy** button. A Save a Copy screen will appear. Select where you want to save the file on your computer, and a file name. The File type will be .pdf and the default option. Click the **Save** button

Quick Reference Guide to Online 4-1-1 Features

Task	Description
Creating/Adding Goals	Type the goal into the text box, and then click the **Add** button located below the text box to save and add your goal.
Editing Goals	Click the ✍ edit icon next to the goal you want to edit. After editing your goal, click the **Edit** button to save your edited goal.
Prioritizing Goals	Click the ▲ up and ▼ down arrows to arrange the goal order according to its priority.
Completing Goals	1. Click on the ☐ box next to the goal. A **Select goal status** dialog box will appear. 2. Click on the ○ Check / Uncheck Goal from list option to insert a check mark indicating the goal is complete. 3. Click the **Done** button to close the dialog box and save your changes. To change a goal status back to incomplete: 1. Click on the ☐ box next to the goal. A **Select goal status** dialog box will appear. 2. Click on the ○ Check / Uncheck Goal from list option to uncheck it indicating the goal is incomplete. 3. Click the **Done** button to close the dialog box and save your changes.
Removing Goals	1. Click on the ☐ box next to the goal. A **Select goal status** dialog box will appear. 2. Click on the ○ Delete Goal number from the list option to delete the goal from your 4-1-1. 3. Click the **Done** button to close the dialog box and save your changes. **NOTE: Removing goals cannot be undone! Make sure that you want to delete the goal before removing it.**
Printing 4-1-1	1. Click the [Print 411] **Print 411** button A print screen will appear. 2. Choose your print options.
Downloading 4-1-1	1. Click the [Download] **Download** button Another window will appear displaying a .pdf file. 2. Click the 💾 Save a Copy **Save a Copy** button. A Save a Copy screen will appear. 3. Select where you want to save the file on your computer, and a file name. The File type will be .pdf and the default option. 4. Click the **Save** button