Goal-Setting Worksheet Template

Use this structured worksheet to define goals that are Specific, Measurable, Achievable, Relevant, and Time-bound (SMART)—and aligned with organizational priorities.

Section 1: Employee Information

- Name:

- Job Title:

- Team/Department:

- Manager's Name:

- Review Period:

Section 2: Strategic Context

- **Key Company Goals This Period:**
  (List 2–3 company or departmental priorities to align with)

Section 3: Individual SMART Goals

For each goal, complete the prompts below. Aim for 3–5 goals max.

Goal #1

- **Goal Statement (SMART format):**
  Launch a new marketing campaign to increase product sign-ups by 25% by September 30, 2025.

- **Strategic Alignment:**
  Tied to the company's Q3 growth objective of expanding user acquisition.

- **Key Results or KPIs:**

  - 25% increase in sign-ups compared to Q2

  - Campaign reach of 100,000+ users

- ○ Conversion rate of 5% from ad traffic

- **Target Deadline:**
  September 30, 2025

- **Milestones (Optional):**

  - ○ Finalize campaign strategy by July 15

  - ○ Launch creative assets by August 1

  - ○ Optimize based on performance weekly

- **Dependencies or Risks:**
  Delay in content approvals or ad budget release

- **Support Needed:**
  Design team support, performance analytics, media buying assistance

- **Progress Tracking (to be updated over time):**

  - ○ Start Date: June 1, 2025

  - ○ Status: ☐ Not Started ☐ In Progress ☐ Completed ☐ Blocked

  - ○ Notes:

Goal #2

- **Goal Statement (SMART format):**
  Increase customer satisfaction score (CSAT) by 10% by the end of Q3 by improving response time and resolution quality.

- **Strategic Alignment:**
  Supports the company-wide objective of improving customer retention and brand loyalty.

- **Key Results or KPIs:**

  - ○ CSAT score improvement from 78% to 88%

  - ○ Average first response time reduced to under 1 hour

  - ○ Resolution time decreased to under 24 hours for 90% of tickets

- **Target Deadline:**
  September 30, 2025

- **Milestones (Optional):**

  - Implement training program by July

  - Launch new ticket triage workflow in August

- **Dependencies or Risks:**
  Dependent on successful integration of the new CRM tool and cross-functional collaboration with engineering.

- **Support Needed:**

  - CSAT dashboard setup

  - Weekly coaching sessions

  - CRM automation support

- **Progress Tracking (to be updated over time):**

  - Start Date: June 15, 2025

  - Status: ☐ Not Started ☐ In Progress ☐ Completed ☐ Blocked

  - Notes:

Goal #3

- **Goal Statement (SMART format):**
  Launch a peer mentoring program for new hires to improve onboarding experience and reduce ramp-up time by 20% by November 2025.

- **Strategic Alignment:**
  Aligns with HR's goal to improve talent retention and enable faster productivity from new employees.

- **Key Results or KPIs:**

  - 90% of new hires matched with mentors within first 2 weeks

- - Reduction in average time-to-productivity from 60 to 48 days

  - Positive feedback from 80% of participants in post-onboarding surveys

- **Target Deadline:**
  November 15, 2025

- **Milestones (Optional):**

  - Design program structure by August

  - Pilot with 2 departments in September

  - Full rollout in October

- **Dependencies or Risks:**

  - Requires buy-in from department leads

  - Risk of low mentor participation

- **Support Needed:**

  - Help from L&D team

  - Communication templates and tracking tools

  - Survey setup and analytics

- **Progress Tracking (to be updated over time):**

  - Start Date: July 1, 2025

  - Status: ☐ Not Started ☐ In Progress ☐ Completed ☐ Blocked

  - Notes:

Section 4: Personal Development Focus

- What skills do you want to grow while pursuing these goals?

- Any stretch opportunities you'd like to explore?

Section 5: Manager Comments (To Be Filled During Review)

- *Manager's feedback on goals and alignment*

- *Suggestions for additional support or clarity*