

# SMART Goals Worksheet



<b>Name:</b>	<b>Manager Name:</b>	<b>Date:</b>
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**Instructions** If your office requires individual goals to be created, consider using this worksheet to draft your goals and review them with your manager prior to entering them into the PeopleFirst Portal. Your manager will need to approve your goals in the system, however, having “pre-approval” eliminates the need for your manager to edit and send back your goals via the system. They can simply approve what you submit the first time.

NFP does not require that goals be formatted in a specific way, but you are encouraged to create SMART Goals. Click [here](#) to view the “Writing SMART Goals” eLearning module prior to completing this worksheet.

## Goal #1

**Step 1: Write down your goal in as few words as possible.**

My goal is to:

**Step 2: Make your goal detailed and SPECIFIC.** Answer who/what/where/how/when.

How will you reach this goal? List at least 3 action steps you’ll take (be specific):

- 1.
- 2.
- 3.

**Step 3: Make your goal Masurable.** Add details, measurements and tracking details.

I will measure/track my goal by using the following methods:

I will know I’ve reached my goal when:

**Step 4: Make your goal Attainable.** What additional resources do you need for success?

Items I need to achieve this goal :

How I’ll find the time:

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Things I need to learn more about:

People I can talk to for support:

**Step 5: Make your goal Rellevant.** List why you want to reach this goal:

**Step 6: Make your goal Timely.** Put a deadline on your goal and set some benchmarks.

I will reach my goal by: [date]

My halfway measurement will be \_\_\_\_\_ on [date].

Additional dates and milestones I'll aim for:

## Goal #2

**Step 1: Write down your goal in as few words as possible.**

My goal is to:

**Step 2: Make your goal detailed and SPECIFIC.** Answer who/what/where/how/when.

How will you reach this goal? List at least 3 action steps you'll take (be specific):

- 1.
- 2.
- 3.

**Step 3: Make your goal Measurable.** Add details, measurements and tracking details.

I will measure/track my goal by using the following methods:

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I will know I've reached my goal when:

**Step 4: Make your goal Attainable.** What additional resources do you need for success?

Items I need to achieve this goal :

How I'll find the time:

Things I need to learn more about:

People I can talk to for support:

**Step 5: Make your goal Relevant.** List why you want to reach this goal:

**Step 6: Make your goal Timely.** Put a deadline on your goal and set some benchmarks.

I will reach my goal by: [date]

My halfway measurement will be \_\_\_\_\_ on [date].

Additional dates and milestones I'll aim for:

## Goal #3 *(add goals as needed)*

**Step 1: Write down your goal in as few words as possible.**

My goal is to:

**Step 2: Make your goal detailed and SPECIFIC.** Answer who/what/where/how/when.

How will you reach this goal? List at least 3 action steps you'll take (be specific):

- 1.
- 2.
- 3.

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**Step 3: Make your goal Masurable.** Add details, measurements and tracking details.

I will measure/track my goal by using the following methods:

I will know I've reached my goal when:

**Step 4: Make your goal Attainable.** What additional resources do you need for success?

Items I need to achieve this goal :

How I'll find the time:

Things I need to learn more about:

People I can talk to for support:

**Step 5: Make your goal Relevant.** List why you want to reach this goal:

**Step 6: Make your goal Timely.** Put a deadline on your goal and set some benchmarks.

I will reach my goal by: [date]

My halfway measurement will be \_\_\_\_\_ on [date].

Additional dates and milestones I'll aim for:

## Helpful Tips

- Goals should be challenging yet achievable, and should typically reflect a continuous improvement mindset, reaching over and above one's primary responsibilities.
- Your goals should be revisited periodically throughout the year; we recommend using the 2<sup>nd</sup> Check-in of the year to discuss goal progress with your manager.
- Talk with your manager about your personal goals as well as broader business goals to determine the appropriate number of goals to create.

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## Sample Goals

- I will proactively reach out to my clients every time a new client facing training series is announced to encourage on-going industry education.
- Form a study group of internal and external customers to provide on-going feedback on the usability of our websites on a quarterly basis in an effort to improve ease of use.
- Introduce each of my clients to a new product and facilitate educational seminars every quarter.
- Utilize Salesforce to increase my integrated (cross-selling) sales by 10% by year end.
- Attend an industry conference and deliver a lunch and learn to the department to share trends and insights on what I learned by year end.
- Sponsor or participate in a local charity event three times by year end.
- Take intermediate Excel e-learning course by end of Q1 and advanced Excel e-learning course by end of Q3.
- Attend 5 seminars or client meetings with a producer to learn more about the sales process by end of the year.