

SMART GOAL SETTING WORKSHEET TEMPLATE

This template will enable you to test the goals you have been set or have given yourself against the five criteria of the SMART method. Setting goals that are motivational for you personally and that offer sufficient challenge to your team to expand their potential is not easy and requires effort and good judgment. This worksheet has been designed to assist you the process of setting yourself, and others, goals that adhere to the SMART criteria.

- **Specific** (can you provide a concise answer to the 5 'W's' – *What, Why, Who, Where & Which*)
- **Measurable** (is the end result quantifiable – *How many? How much? Is the end clear?*)
- **Attainable** (can I see - achieving it or is it completely overwhelming?)
- **Relevant** (can you answer 3 things – Does it fit in? Is the timing right? Are there enough resources/budget?)
- **Time Bound** (it has an end date – one can plan for, provides focus, sense of urgency vs importance?)

Ensuring your goals meet each of the SMART criteria is only part of what you need to do to be a successful manager, they represent the 'words' of what is needed, but it is how you 'action' the attainment of each goal that will set you apart from others and enable you to realize your aspirations. This worksheet guides your actions for success with a simple method we refer to as 'The 3P's':

- **Plan** (How to achieve goal by breaking it into manageable chunks.)
- **Progress** (Make regular checks of how well your progress matches your plan.)
- **Priority** (After ever progress check evaluate your priorities to ensure it is appropriate.)

The combination of the SMART method and the practical execution using the 3P's will enable you to effectively achieve your goals. The worksheet can be used as part of your own personal development or in conjunction with an annual appraisal form to aid the creation of your next annual goals.

HOW TO USE THIS WORKSHEET

1. Write the goal description down in the top box as indicated.
2. Then test it for each of the SMART criteria.
3. Revise the goal description so that it meets requirements of the SMART method.
4. Then outline how you plan to actually achieve this goal using the 3P's approach.
5. If necessary, revise the goal description so that it meets both the SMART method & 3P's approach.

SMART GOAL SETTING WORKSHEET

Goal 1 Description:

SPECIFIC TEST

Is 'What' identifiable?

Is the 'Why' clear?

Can 'Who' be identified?

'Where' will it be performed?

'Which' resources are needed?

MEASURABLE TEST

Is the end result quantifiable?

'Figure' of Measurement

Has the goal a clear end date/point?

ATTAINABLE TEST			
What is your reaction to goal?	Does it feel realistic?	Is it overwhelming?	Do you find it motivating?
RELEVANT TEST			
Does it fit into the overall team / organization objective?	Taking overall fit is the timing appropriate?	Do you have sufficient resources / budget to succeed?	
TIME BOUND TEST			
Does it have a clear end date/point?	Is the focus clear so you can create an action plan?		Is its position on an Urgency/Importance grid clear?

Revised Goal 1 Description:			
Plan	Progress Checks		Priority Assessment
Manageable Chunks: 1. 2. 3. 4. 5. 6. 7. 8.	How & what is assessed	Date	Does importance/urgency need to changed following a progress check? YES / NO YES / NO YES / NO
Final Goal 1 Description:			
Approved by:	Signature(s):	Date:	

SMART GOAL SETTING WORKSHEET

Goal 2 Description:

SPECIFIC TEST

Is 'What' identifiable?

Is the 'Why' clear?

Can 'Who' be identified?

'Where' will it be performed?

'Which' resources are needed?

MEASURABLE TEST

Is the end result quantifiable?

'Figure' of Measurement

Has the goal a clear end date/point?

ATTAINABLE TEST			
What is your reaction to goal?	Does it feel realistic?	Is it overwhelming?	Do you find it motivating?
RELEVANT TEST			
Does it fit into the overall team / organization objective?	Taking overall fit is the timing appropriate?	Do you have sufficient resources / budget to succeed?	
TIME BOUND TEST			
Does it have a clear end date/point?	Is the focus clear so you can create an action plan?		Is its position on an Urgency/Importance grid clear?

Revised Goal 2 Description:			
Plan	Progress Checks		Priority Assessment
Manageable Chunks: 1. 2. 3. 4. 5. 6. 7. 8.	How & what is assessed	Date	Does importance/urgency need to changed following a progress check? YES / NO YES / NO YES / NO
Final Goal 2 Description:			
Approved by:	Signature(s):	Date:	

SMART GOAL SETTING WORKSHEET

Goal 3 Description:

SPECIFIC TEST

Is 'What' identifiable?

Is the 'Why' clear?

Can 'Who' be identified?

'Where' will it be performed?

'Which' resources are needed?

MEASURABLE TEST

Is the end result quantifiable?

'Figure' of Measurement

Has the goal a clear end date/point?

ATTAINABLE TEST			
What is your reaction to goal?	Does it feel realistic?	Is it overwhelming?	Do you find it motivating?
RELEVANT TEST			
Does it fit into the overall team / organization objective?	Taking overall fit is the timing appropriate?	Do you have sufficient resources / budget to succeed?	
TIME BOUND TEST			
Does it have a clear end date/point?	Is the focus clear so you can create an action plan?		Is its position on an Urgency/Importance grid clear?

Revised Goal 3 Description:

Plan	Progress Checks		Priority Assessment
Manageable Chunks: 1. 2. 3. 4. 5. 6. 7. 8.	How & what is assessed	Date	Does importance/urgency need to changed following a progress check? YES / NO YES / NO YES / NO

Final Goal 3 Description:

Approved by:	Signature(s):	Date:
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