

Need a Hand Getting Started?

Goal-Setting Worksheet



Section

Details

1. Strategic Priority

What's the key objective this goal supports? (e.g. Expand to new region, Improve profitability, Launch new product)

2. Financial Goal

Define the specific goal
(e.g. Increase net profit margin to 18% by Q4)

3. Type of Goal

- ☐ Revenue Target
- ☐ Profit Margin
- ☐ Cost/Expense Control
- ☐ Growth Goal (e.g. expansion, hiring, acquisition)

4. Timeframe

Start Date:

Target Date:

5. Key Metrics (KPIs)

What will you measure to track progress?
(e.g. monthly turnover, churn rate, cost per unit)

6. Owner/Team Responsible

Who's accountable for delivery?

7. Progress Review Dates

Set monthly or quarterly review check-ins

8. Notes & Adjustments

Leave space to record outcomes, changes, or next steps