Goal setting worksheet for one work goal, with a worked example

A goal setting worksheet helps one person turn an intention into a plan: one work goal, a baseline with evidence, a finish line, a first next action, obstacles and support, and three review dates. This kit gives you a blank worksheet, a filled example from a fictional team lead, pair review questions, a review sheet for three check-ins and a 40-minute session to fill it in at the end of a workshop or in a one-to-one. The Excel tracker works out progress from the baseline to the finish line and the days to the next review.

40 minutes | 2–24 participants | Online and adaptable in person

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The outcome

In 40 minutes each participant writes one work goal with a baseline and its evidence, a finish line with a date, a first action to start within two working days, one obstacle with a plan for it, one request for support and three review dates in their calendar.

Before the session

- For trainers and facilitators who close a workshop or a course with 2–24 adult learners, and for team leads who use it with one person in a one-to-one. Each person writes one goal about their own work. For a plan that a whole team shares, with several owners, use the team action plan template instead.
- Print one goal setting worksheet and one goal review sheet per person, or share an editable copy. Keep the filled example ready on screen. Think of two measures that fit your course, so that you can help people who say their goal cannot be counted.
- Say at the start what stays private: the worksheet belongs to the learner, and nobody hands it in. If a sponsor wants a summary, agree with the group what is shared.
- Offer the worksheet on paper and as an editable file that works with a screen reader. People may type, write by hand or dictate. In the pair review anyone can pass or review in writing.

Included in this kit

A facilitator run of show, participant worksheets with real tables, reference tables, debrief questions, adaptation notes and a follow-up plan. Use the editable Word copy to tailor examples and prompts before delivery.

Original material by Superglue. Timings are suggestions; adjust them to your participants. This resource has not been independently evaluated.

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- Filled example: goal review sheet
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Goal setting worksheet

One goal about your own work. Read the prompt in each box and write under it. This sheet is yours: share only what you choose.

Name: _____ Date: _____ Review partner: _____

Part	Write here
1. My goal	One sentence that starts with a verb and says what will be different in your work. One goal only.
Why it matters	Who gains if you reach it, and what it costs if nothing changes.
2. Baseline	Where you are today, as a number or a plain description, and the evidence: where someone could look to check it.
3. Finish line	What you or someone else will be able to see or count, and on which date.
4. First next action	One action you can start within two working days and finish in 30 minutes or less. Write the day and the time.
Two more actions	What comes after the first action. Give each one a date.
5. Obstacles	What is most likely to get in the way. Write each one as “If …, then I will …”.
Support	Who can help, what exactly you will ask for, and by when you will ask.
6. Review dates	Three dates that are in your calendar, and the person you will review with.

Pair review questions

Your partner asks these questions about your worksheet and listens. The partner does not give advice. You decide what you share and what you change.

The partner asks	Listen for
What will be different when you reach this goal?	One change in the person's own work, not a list. If you hear "and", ask which part comes first.
Where are you today, and where could I look to check that?	A number or a plain description of today, and a source such as a calendar, a report or a folder.
What will I be able to see or count on the finish date?	The same measure as the baseline, and a date. "Better" and "more" are not yet a finish line.
What will you do first, and when exactly?	A day and a time within two working days, and an action that takes 30 minutes or less.
What is most likely to stop you, and what will you do then?	A real obstacle from the person's own week, and an "if …, then I will …" answer.
Who will you ask for help, and what will you ask for?	A named role, a specific request and a day to ask. A request can be refused; is there a second option?
When will you look at this again, and with whom?	Three dates that the person writes into a calendar before leaving the room.

The one line I changed after the review

_____

_____

Weak goal, stronger goal

Five fictional examples. Use them when you are stuck on part 1 or part 3 of the worksheet.

Weak goal	What is missing	Stronger version
"Communicate better with my team."	No baseline, no finish line and nothing to count.	"Hold a one-to-one with each of my six team members every two weeks, each with a written next step, by 11 December."
"Be more organised."	It describes a trait, not an action.	"By 30 October every task I accept has a due date in my task list, and I check the list each Friday."
"Reduce meeting time."	No number and no date.	"By 24 November my weekly project meeting takes 45 minutes on average over three meetings, down from 70."
"Finish the onboarding guide."	The finish line is unclear: finished for whom?	"By 27 November all 12 pages are rewritten in plain language, and a new colleague has read them and marked what is unclear."
"Get top ratings for every session."	It depends on other people's ratings more than on your own actions.	"In my next three sessions I end with a five-minute practice task and ask two people what was unclear."

Goal review sheet

Use one column at each review date. Measure the same thing as your baseline each time. Progress = (value today − baseline) ÷ (finish line − baseline). Example: baseline 2, finish line 6, value today 4 gives 2 ÷ 4 = 50%.

My goal, my baseline and my finish line with its date

_____

_____

What to record	Check-in 1	Check-in 2	Check-in 3
Date of the check-in			
My value today, on the same measure as the baseline			
Progress (see the note above)			
What helped			
What got in the way			
Decision: keep, adapt or stop			
Next action, with a date			

Filled example: goal setting worksheet

A fictional example. A team lead in a customer support team of six fills in the worksheet on Tuesday 6 October 2026, at the end of a one-day workshop on feedback conversations.

Part	What the team lead wrote
1. My goal	Hold a 30-minute one-to-one with each of my six team members every two weeks, and end each one with a written next step.
Why it matters	In September two people told me that they only hear from me when something goes wrong. Small problems reach me late, and then they cost the team more time.
2. Baseline	2 of 6: in the two weeks to Friday 2 October I held two one-to-ones that ended with a written next step. Evidence: my calendar and my notes folder.
3. Finish line	6 of 6: in the two weeks to Friday 11 December, all six people have had a one-to-one with a written next step. My calendar and the six notes show it.
4. First next action	Wednesday 7 October, 09:30, 20 minutes: book a recurring 30-minute slot with each of the six people, starting in the week of 12 October.
Two more actions	By Friday 9 October: write a note template with three questions and a line for the next step. On Monday 12 October: tell the team in the weekly meeting what changes and why.
5. Obstacles	If the support queue peaks and I must cancel a slot, then I will rebook it in the same week before I cancel it. If a conversation runs over, then I will keep the last five minutes for writing the next step together.
Support	My manager: by Thursday 8 October I will ask for cover for escalations on Tuesday and Thursday from 14:00 to 16:00. A colleague from the workshop: a 15-minute call on each review date.
6. Review dates	Tuesday 20 October, Tuesday 10 November and Friday 11 December, each with my workshop colleague.

Filled example: goal review sheet

The same fictional team lead at three check-ins. Baseline 2 of 6, finish line 6 of 6 by Friday 11 December. The goal was not fully reached, and the last decision was to adapt it.

What to record	Check-in 1	Check-in 2	Check-in 3
Date of the check-in	Tue 20 Oct	Tue 10 Nov	Fri 11 Dec
My value today, on the same measure as the baseline	3 of 6	4 of 6	5 of 6
Progress	25%	50%	75%
What helped	The recurring slots in the calendar. The note template kept each conversation to 30 minutes.	My manager took the escalations on Tuesday and Thursday afternoons.	Writing the next step together in the last five minutes.
What got in the way	Two slots fell in the Monday queue peak, and I cancelled both.	One person was on leave. One slot clashed with a client call, and I rebooked it too late.	One part-time colleague is rarely at work on the slot days.
Decision: keep, adapt or stop	Keep. Move every slot away from Monday.	Keep. Rebook on the same day, before I cancel.	Adapt. Every two weeks for five people, and a 45-minute slot once a month for the part-time colleague.
Next action, with a date	Move the Monday slots to Tuesday or Thursday by Wed 21 Oct.	Ask the two people I missed which day suits them, by Thu 12 Nov.	Agree the monthly slot with the part-time colleague by Tue 15 Dec.

Facilitator run of show

1 Open and choose one goal | 5 minutes

Say: “You will leave with one goal for your own work and a first action for this week. The worksheet is yours. You choose what you share.” Show the filled example for one minute. Give three minutes of silent writing for part 1: one sentence that starts with a verb, and why it matters. If someone has three goals, ask: “Which one would you be sorry to drop?” Use the last minute to check that everyone has one sentence.

2 Write the baseline with evidence | 6 minutes

Ask: “Where are you today? Write a number if you can, and where someone could look to check it.” Give four minutes of silent writing. If a goal has no number, ask for a count of recent cases, such as “in my last four meetings, one ended with written actions”, or a plain description of what happens now. Spend the last two minutes on questions. Nobody reads a baseline aloud unless they choose to.

3 Draw the finish line | 6 minutes

Say: “Use the same measure as your baseline. What will you or someone else be able to see or count, and on which date?” Give four minutes of silent writing. Ask people to choose a date between four and twelve weeks

from today, so that three reviews fit. In the last two minutes, read the two lines from the filled example, “2 of 6” and “6 of 6”, to show a baseline and a finish line on one measure.

4 Plan the first next action, obstacles and support | 8 minutes

Three minutes: “Write one action you can start within two working days and finish in 30 minutes or less. Give it a day and a time.” Then add two more actions with dates. Three minutes: “What is most likely to get in the way? Write: if that happens, then I will …” Two minutes: “Who can help, what exactly will you ask for, and by when?” Remind people that a request can be refused, so a second option helps.

5 Pair review | 10 minutes

Form pairs; with an odd number, make one group of three, where each person gets about two and a half minutes. One minute: hand out the pair review questions and explain that the partner asks and listens and does not give advice. Four minutes for the first person, then four minutes for the second. People share only the parts they choose. In the last minute, everyone changes one line on their own worksheet. Anyone who prefers can swap worksheets and write two questions in the margin, or review alone with the questions.

6 Set the review dates and close | 5 minutes

Give three minutes: each person writes three review dates on the worksheet and puts them in a calendar now, with the name of the person they will review with. Hand out the goal review sheet and show how the progress figure is worked out. In the last two minutes, ask each person to say or type their first next action and its day, or to pass. Say once: “This is a planning aid. It does not guarantee a result, and it is not part of anyone’s appraisal.”

Reference tables

Filled example: goal tracker

Three fictional participants of one workshop agreed to share their numbers with the trainer. The view is from Tuesday 10 November 2026. Progress = (value − baseline) ÷ (finish line − baseline). The second goal has a finish line below its baseline: (55 − 70) ÷ (45 − 70) = 60%. The Excel tracker makes the same calculation.

Goal and measure	Baseline	Finish line	Value on 10 Nov	Progress	Next review	Days to review
Team lead: one-to-ones with a written next step in the last two weeks, out of 6	2	6	4	50%	Fri 11 Dec	31
Project coordinator: average length of the weekly project meeting over the last three meetings, in minutes	70	45	55	60%	Tue 24 Nov	14
Learning designer: pages of the onboarding guide rewritten in plain language, out of 12	0	12	9	75%	Fri 27 Nov	17

Debrief and next steps

Questions for reflection

- Which part of the worksheet was hardest to write, and what made it hard?
- How did writing the baseline change the goal you started with?
- Which question from your partner made you change a line?
- What could stop your first review from happening, and what will you do about that today?

Adapt the session

- In a one-to-one, the team lead asks the pair review questions and the team member writes. Allow 30 minutes. The goal stays the team member’s own; keep targets that the organisation sets in your appraisal process, not on this worksheet.
- For a 20-minute version, send parts 1 and 2 as pre-work, give five minutes each for the finish line and the first next action, five minutes for a short pair review of those two parts, and five minutes for the review dates.
- Online, share the worksheet as an editable file and keep the prompt for each part in the chat. Use breakout rooms of two for the pair review, with cameras optional, and offer a written review in a shared document as an equal choice.
- For quiet participants, or where goals feel personal, make the pair review optional: a person can review alone with the pair review questions, or show the facilitator one line in private. Never ask anyone to read a baseline to the whole group.
- For a course with several sessions, fill in the worksheet at the end of session 1 and open each later session with five minutes on the goal review sheet.

After the session

Within two working days, send one reminder: the first next action is due, and the first review date is in the calendar. At each review date the learner fills in one column of the goal review sheet and decides to keep, adapt or stop. Adapting or stopping a goal is a valid result. If you collect numbers for the tracker, ask first, keep them to the measure and the value, and do not pass them to a manager without the learner’s agreement.

Questions people ask

What should a goal setting worksheet include?

One goal in one sentence, why it matters, a baseline with evidence, a finish line with a date, a first next action and two more, the likely obstacles, the support you will ask for and review dates. This worksheet has those nine boxes on one page, and a separate review sheet for three check-ins.

How do I write a baseline when my goal has no number?

Count recent cases or describe what happens now. “In my last four team meetings, one ended with written actions” is a baseline. So is “Today I answer questions about the new process from memory, and I have no written guide.” Add where someone could look to check it, such as a calendar, a folder or a report.

Is this a SMART goals worksheet?

No. SMART is usually credited to George T. Doran’s article in Management Review in November 1981, and many worksheets are built on it. This one uses its own order: goal, baseline, finish line, next action, obstacles

and support, review. If your organisation uses SMART, the baseline and finish line boxes hold the measurable and time-bound parts.

How is this different from the team action plan template?

The team action plan template is for a team: one shared goal and several actions, each with its own owner. This worksheet is for one person and one goal, with a baseline and a personal review. After a workshop you can use both: the team plan for shared decisions, and this worksheet for what each person will do differently.

Can a manager use this worksheet in a performance review?

It is not designed for that. It is a planning aid that a learner owns and may change or stop at a review. It does not rate a person, and it does not guarantee a result. A team lead can use it in a one-to-one to support someone's own goal, separate from appraisal and pay decisions.

What is included in the free and editable files?

The open PDF has the goal setting worksheet, the pair review questions, the goal review sheet, a table of weak and stronger goals, filled examples of the worksheet and the review sheet, and the 40-minute session plan. Subscribers also receive the editable Word file, an Excel workbook with a goal tracker that calculates progress and days to each review, a review log and filled examples, and a CSV of the worksheet prompts.

Use and sharing

Free to use and adapt in your own training sessions, including paid client work. Do not resell or redistribute the unmodified download as a standalone product. Share the resource page instead.